# Forum-PI 2017 Schedule

May 8<sup>th</sup>, 2017 Zhongjia Palace Hot Spring Hotel, Beijing, China Emcees: Mr. Wang Lijian, Prof. Pu Jialing

Time	Contents	Speaker	Position	Organization
9:00—9:30		Si	gn in	
9:30—9:40	Intrduction to VIPs	Mr. Wang Lijian	Vice Chairman & Secretary General	PEIAC
9:40—9:50	To promote Sustainable Development of Printing Industry with Results of Innovative Work	Mr. Liu Xiaokai	Director	Printing and Distribution Department of State Administration of Press, Publication, Radio, Film and Television of the People's Republic of China
9:50—10:00	Address	Mr. Zhao Chi	Executive Vice President & Secretary General	China Machinery Industry Federation
10:00—10:20	The UK Printing Industry Today	Mr. Robert Flather	Chairman	Printing Industry Confederation
10:20—10:40	Proud to be a Printer	Prof. Kamal Chopra	President	AIFMP
10:40—10:50		Tea	Break	
10:50—11:10	Printing and Packaging Industry	Mr. Marco Calcagni	President	Italian Manufacturers Association of Machinery for the Graphic, Converting and Paper Industry
11:10—11:30	Indonesia Outlook—– Offset Printing Industry in the Digital Society	Mr. Ahmad Mughira Nurhani	President	Indonesian Print and Media Association
11:30—11:50	Status quo and Development Trend of Printing Industry in China	Mr. Xu Jianguo	Chairman	PEIAC
		Lunch: 11:50—1	3:20	
13:20—13:30	Introducing guests participating in the dialogue	Mr. Wang Lijian	Vice Chairman & Secretary General	PEIAC
		Mr. Robert Flather	Chairman	Printing Industry Confederation
		Mr. Lu Chang'an	Vice Chairman	PEIAC
	Dialogue 1 Frontier Technology Market Development	Mr. Marco Calcagni	President	Italian Manufacturers Association of Machinery for the Graphic, Converting and Paper Industry
13:30—14:50	Future Trend	Mr. Masato Atoda	Aaaociate Director	Tokyo Office, Asia Pacific Headquarters, Keypoint Intelligence Asia Pacific
	Emcee : Prof. Pu Jialing (Vice President, Beijing Institute of Graphic Communication)	Mr. Wu Yongqiang	Vice General Manager	Beijing Zhongke Liyan Technology Development Co., Ltd.
	Grapino Gorrina noation,	Mr. Lu Weidong	Vice President	Beijing Founder Electronics Co.,Ltd.
		Ms. Li Yanqiu	Vice Chairman & General Manager	Beijing Shengtong Printing Co., Ltd.
14:50—15:00		Question	and Answer	
15:00—15:10			Break	
		Mr. H V Sheth	President	IPAMA
	Dialogue 2 The Belt and Road	Mr. Ahmad Mughira Nurhani	President	Indonesian Print and Media Association
15:10—16:30	Seeking for opportunities Cooperation for win–win	Mr. Min Han	Chairman	Myanmar Printers & Publisher Association
13.10—10.30	Emcee : Prof. Pu Jialing (Vice President, Beijing Institute of	Mr. Basit M.A. Zaidi	Senior Vice President	Pakistan Association of Printing & Graphic Arts Industry
	Graphic Communication)	Mr.Bobak Abedin	Chairman	Iran Print Industry Exporters Union
		Mr. Nguyen Van Dong	President	Vietnam Printing Association
40.00 :-		Mr. Liu Keli	Chairman	Shanxi Yuncheng Plate Making Group
16:30—16:40		•	and Answer	
16:40—16:50		Awarding Certificate to th		EIAC
16:50—17:00	Closing Address	Mr. Wang Lijian	Vice Chairman & Secretary General	PEIAC
17:00-17:10		Grou	p Photo	



# **Introduction to Leader**

# Mr. Liu Xiaokai

Director of Printing and Distribution Department of State Administration of Press, Publication, Radio, Film and Television of the People's Republic of China

Mr. Liu Xiaokai has held posts of Vice Director of Printing and Publication Management Department, Vice Director of Laws Department, General Administration of Press and Publication; Secretary of Party Leadership Group and Deputy Director of Education and Training Center, General Administration of Press and Publication; Director and Secretary of Party Leadership Group of Information Center (the Internet and Publishing Monitoring Center), General Administration of Press and Publication.

# **Introduction to Leader**

# Mr. Zhao Chi

**Executive Vice President & Secretary General China Machinery Industry Federation** 

Mr. Zhao Chi has successively held posts of Director of Division 1 and Division 2 of Labor and Personnel Department of Ministry of Electric and Machinery, Ministry of Machinery, National Machinery Bureau; Secretary of Commission for Discipline Inspection of the Institute of Mechanical Science; Executive Vice President & Secretary of Commission for Discipline Inspection of China Machinery Industry Federation.





# **Introduction to Emcee**

# Mr. Wang Lijian

Vice Chairman & Secretary General
Printing and Printing Equipment Industries Association
of China

#### Positions took:

2<sup>nd</sup> Regiment, 1st Division of Heilongjiang Production and Construction Corps

Platoon Leader of Repair Company
Staff of Branch of Chinese Communist Youth League
Staff of Department of Propaganda

Cadre of People's Posts and Telecommunications Publishing House

Ministry of Posts and Telecommunications

Cadre of General Office of General Post Administration

Staff of the Comprehensive Research Department of Secretariat of General Office

Ministry of Industry and Information Technology

Deputy Director and Director of the Press Department of the General Office

Deputy Inspector of the General Office

# **Introduction to Emcee**

# Prof. Pu Jialing

Vice President Beijing Institute of Graphic Communication

Prof. Pu Jialing was born in Yaan, Sichuan Province, China, on December 6<sup>th</sup>, 1959. He acquired bachelor degree in Graphic Arts Processes from Beijing Institute of Printing in 1982 and then moved to Japan for his postgraduate studies in 1983. He obtained his Master degree in Printing Engineering from Chiba University in 1986 and Doctor Degree in Information Engineering from Tokyo Institute of Technology in 1989, and then spent another one year conducting research under the title of Associate Research Fellow in the Laboratory of Imaging Science and Engineering, Tokyo Institute of Technology before getting back to his home country.

In 1990 April after 7 years studies in Japan, he returned to China and became a fulltime lecturer in the Department of Printing Technology, Beijing Institute of Graphic Communication and then promoted to Associate Professor the next year and professor in

1997. The same year, he was promoted to the post of vice president in charge of academic affairs.

Prof. Pu has longstanding interests in photo- and electroimaging materials and selforganizing semiconductor materials and their applications in information marking and printing. He has created the discipline of Information Marking Material & Its Application and established a research laboratory under the same name. All of them have grown up well established and are now the most important components of the Beijing Municipal Key Labortory-Printing & Packaging Materials and Technologies, and the Beijing Municipal Key Discipline of Material Physics and Chemistry, respectively. Over 10 of his research projects have received fundings from the Natural Science Foundation of China and Beijing Municipal and Ministerial Governments.



# **Introduction to Speaker**

# Mr. Robert Flather

Chairman Printing Industry Confederation

Robert Flather is Chairman of PICON, the UK association of print related manufacturers and suppliers and has been on the PICON Council since 2008.

Robert has a degree in Mechanical Engineering and a Masters in Management Sciences. He worked in the steel industry before joining the printing industry, where he worked for Clays the book printers and Jarrolds the magazine and catalogue printer. He joined Kolbus UK in 1997 and became Managing Director in 1998 with responsibility for the UK, Ireland, France and Belgium. Kolbus is the global leader in the design and manufacture of industrial book and magazine binding machinery for both traditional and digitally printed products.

He is also a member of the Court of The Stationers' Company, the City of London Livery Company for the Communications and Content Industries, and Chairman of it's charity, the Stationers' Foundation.





# The UK Printing Industry Today Robert Flather, Chairman, PICON Managing Director, Kolbus UK President, Global Print







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#### Quality print is powerful

- Print is far from dead
- The marketing industry is its biggest customer



picon

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#### Analogue-to-digital transition

Conventional Kit



releven

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#### Publishing trends: magazines

#### Magazines



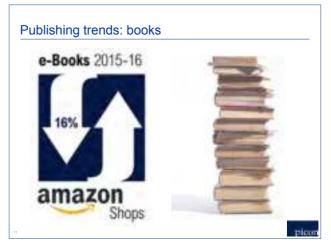


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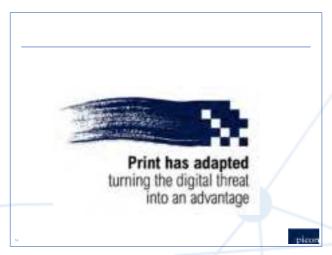


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# **Introduction to Speaker**

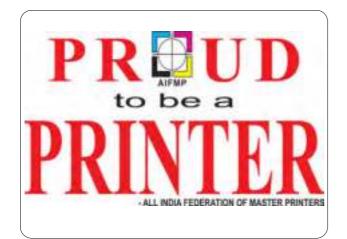
# Prof. Kamal Chopra

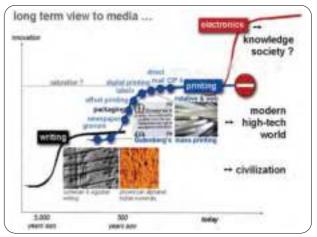
President
All India Federation of Master Printers

Prof. Kamal Chopra is a Gold Medallist in Printing Technology from NRIPT, Allahabad. In the year 1980, the President of India conferred National Award for excellence in Designing on him. In the year 1997, he was nominated for Udyog Rattan Award by Institute of Economic Studies. In the year 1999, He was declared "Man of Achievement" by the International Publishing House. He is recipient of Prof. Puran Singh Dhami Award for the year 2008-09 in the field of Communication, Printing and Print Education. Global Print Leadership Award was presented to him in 2013 at Chicago USA by NPES. Indian Solidarity Council also awarded him 'Man of Excellence' award in the year 2013.

Prof. Kamal Chopra is President of All India Federation of Master Printers (AIFMP); General Secretary of Offset Printers' Association, Ludhiana; NIPA Educational Trust and also General Secretary/ Treasurer of Indian Society of Communication Technology; Honorary Professor of Beijing Institute of Graphic Communication (BIGC), China; Adjunct Professor, M C National University of Journalism and Communication, Bhopal, India; Visiting Professor/fellow Department of Printing, Dr. B R Ambedkar Marathwara University, Aurangabad, India; the member of Academic Council of G J University of Science & Technology, Hisar.







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#### **PRINTING TECHNOLOGY**

PHASE 1 (TRADITIONAL APPROACH )

ADDING INK ON PAPER ( MORE OF HISTORY...STILL CONTINUEING......)

PHASE 2 (CURRENT TREND: FURTHER VALUE ADDITIONS)

FURTHER VALUE ADDITIONS: UV, SPOT, DRIPP-OFF, EXTRA COLOURS, RGB+CMYK, TACTILE ETC..(ON GOING...MARKET STILL STRONG)

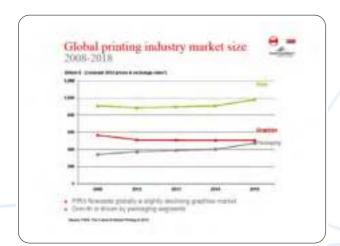
#### PHASE 3 ( FUTURE TREND : MANUFACTURING ENGINEERING)

(PRINT AS A REPLIRPOSED TECHNOLOGY -PURELY FROM THE RESEARCHERS POINT OF VIEW) MANUFACTURING, MEDICAL SCIENCE, CONSTRUCTION, NANO & BIOMETRICS, ELECTRONICS, BIOPRINTING, FOOD PRINTING, MICRO STRUCTURING ETC....ETC...

**Global Print Industry** 

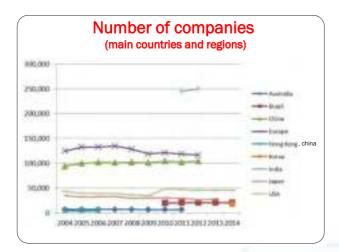


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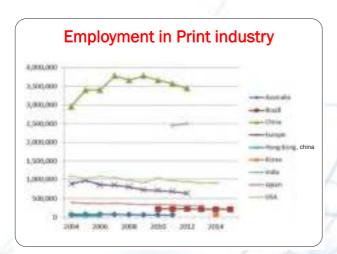




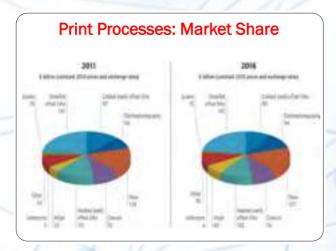
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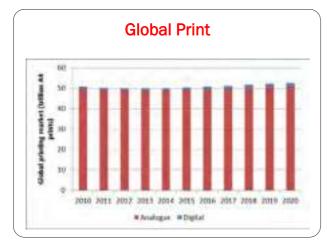
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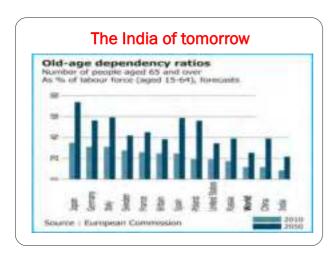
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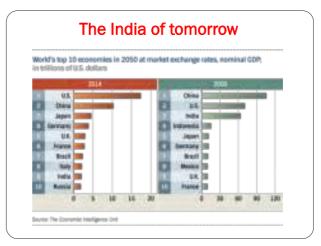




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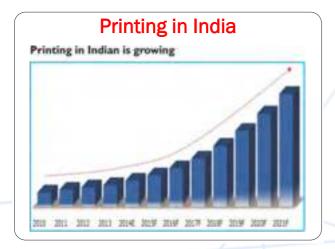
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#### **Printing in India**

- 250,000 Printing Companies
- 2.6 Million Employees
- 36 Printing Institutes
- 3,500 Printing Engineering graduates every year
- 13 per cent compound growth

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# Printing in India Value of the print industry in India from 2007 to 2018 (in billion Indian regions)

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#### **Printing in India**

- Domestic sale of indigenous machinery doubled from USD 1 billion in 2009 to USD 2 billion 2015
- Export of Indian Machinery doubled from USD 10 to USD 20 billion in the same period.
- 813 Paper Mills
- Estimated turnover USD 8 billion
- Employment to 0.5 million directly and 1,5 million indirectly
- ☐ The Printing Industry in India with its allied industries like Printing Machinery Manufacturers, Packaging industries, Paper manufacturing, Ink manufacturing and manufacturers of raw materials and consumables put together ranks second in the world in growth and supplies.

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#### **Printing in India**

- Annual turnover USD 8 billion
- Indian books, journals and printing jobs exported to 120 countries
- USD 300 million Export during 2014-15

Note

#### **Indian Print Publishing Sector**



#### **Indian Print Publishing Sector**

- India has a healthy consumption of books. The book demand in India is propelled by
  - The GDP growth,
  - The reading habits of the burgeoning Indian middle class
  - Increase in literacy rates and
  - A young and knowledge hungry population.
- Publishers forecast that India will become the biggest English language book-buying market in the world.
   Today, it is the third largest after USA and UK.
- The good news is, India is poised on the cusp of a great educational revolution.

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#### **Indian Print Publishing Sector**

- Increasingly, global publishers are looking to India due to the country's advantages of
  - English language,
  - Digital and IT competence and
  - Better copyright protection environment.
- Global publishers are eyeing India.
  - Besides print, they are also looking at India as a market for their content.
- Therefore can India become an outsourcing hub for publishing services?
- The Indian book printer firms have an opportunity, but we need to think big and think collective.

#### Printing Presses in 2015

- 71 New sheet-fed installations 340+ printing units
- 590+ Pre-owned units i.e. 2350+ printing units
- It has been observed that Indian printers prefer imported printing presses compared to their domestic counterparts.

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# Printing (Future Trends) Where printing research is heading today?

- ☐ Cross Media Linking with Augmented Reality(AR) (to retain conventional print). (Example: Lego Toys)
- ☐ Intelligent applications like IR based security
- ☐ Printed speakers
- ☐ Printed Batteries, Photovoltaic Cells, Solar Cells
- ☐ Connecting luxury brands with touch code technology
- ☐ Low power printed electronics for Humans
- ☐ Smart skin-MC10
- ☐ Printed Implantable devices
- ☐ Printed organs

#### Where printing research is heading.....?

- ☐ Scientists develop new nanomaterials that steers current in multiple dimensions (Could a computer one day get rewired by printing?)
- □ Developments in functional Electronic Inks, Conductive, Semi conductive and Dielectric inks.
- ☐ Scalable printed CMOS memory (by Thinfilm company)
- ☐ Tiny printed artificial muscles (University of Wollongong, Australia)
- ☐ Electro Luminescence , Push Buttons, Printed Technical Textiles
- ☐ Printed Leaves...?

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#### PRINTING TECHNOLOGY & ITS FUTURE

- Printing will be a part and parcel of all modern innovations.
- It will be an integral part of medical science.
- Certainly be a major contributor in mechanical manufacturing.
- It will play a crucial role in electronics : "SMART" is coming!
- Printing of electronic functions will become an added value.
- Traditional printing technologies like, Offset, Screen, Flexo & Gravure will continue in a more important way.
- Digital printing will become an additional production support and that too will grow in its own domain!

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#### Beyond graphics: Industrial Print

- Textiles
- Décor and laminate
- Ceramics
- Electronics
- Glass
- Automotive
- Bio-medical
- Promotional/miscellaneous
- 3D Printing



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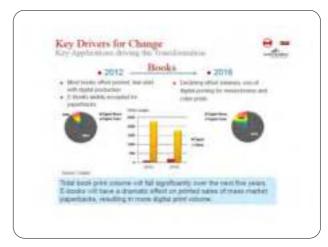


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#### **About Us**



- Apex body of 250,000 printers of India
- PRINTINGTIMES
  - Bimonthly house journal and best source of information for Indian printers.
- PAMEX
  - India's oldest and truly international exhibition for printing and allied machines and materials. Next PAMEX at Mumbai on 18-21 December, 2017



#### **About Us**



- NAEP
  - National Awards for the Excellence in Printing, considered to be the Oscars of printing in India.
- Collaboration with BIGC for Print Education
- The first batch of Indian Print Professionals will be getting 3 month training at BIGC from 15<sup>th</sup> Mat to 11<sup>th</sup> August, 2017.

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**Prof. Kamal Chopra**President
All India Federation of Master Printers

# **Introduction to Speaker**

### Mr. Marco Calcagni

**President** 

Italian Manufacturers Association of Machinery for the Graphic, Converting and Paper Industry



In 1985 obtained a diploma as mechanical technician. In the 90's evening English and German language courses at Istituto Europa; "Corporate strategy and business development" course at CESMA. In the 2000s "Strategy and success for entrepreneurs and managers" course at WONDERFUL; courses held by Ambrosetti dealing with corporate communication, leadership, corporate strategy and business development. Other courses dealing with controlling, accounting and sales contracts. Certified Trainer Manager.

#### Work Experience:

Acquired professional experience at OMET Srl: from 1987 to 1991 worked as installation technician on travelling assignments; up to 1993 post-sales director; from 1993 to today sales and marketing director; since 2000 Vice-President of OMET China and since 2012 Vice-

President of OMET Americas, Inc.

#### Current Roles in Trade Associations:

Since 2013 President of A.C.I.M.G.A., Milan (Italian Manufacturers Association of Machinery for the Graphic, Converting and Paper Industry); Board Member of A.T.I.F. Milan (Italian Technical Association for the Development of Flexography) and FEDERMACCHINE. President of C.P.A. (a holding of A.C.I.M.G.A. Promotional Center) and Board Member of the "CLUB TECNOLOGIA e PASSIONE" group.

#### **Professional Skills:**

10+ year experience in corporate business in the industry of printing machinery for converting, packaging as well as for napkins and related products. Strong relational skills, both within the group with a decision-making and strategic role and on the market

with negotiation and marketing activities. Positivity, passion for work, curiosity, resourcefulness are some of the qualities that enable me to carry out activities by involving my coworkers in achieving efficiency and effectiveness objectives.





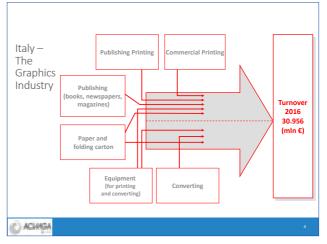
# PRINTING AND PACKAGING INDUSTRY

ITALY

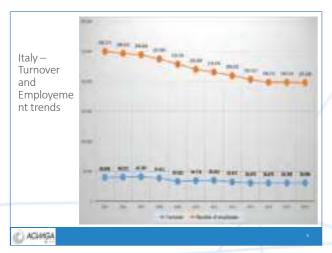
Italian Economy and Graphics Industry

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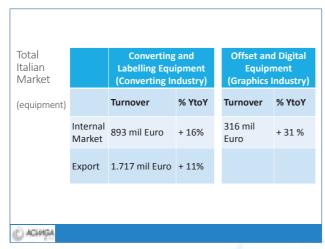


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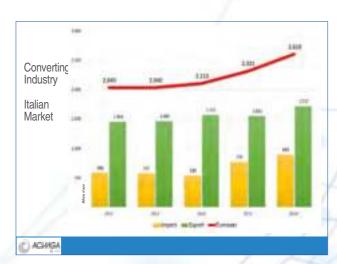




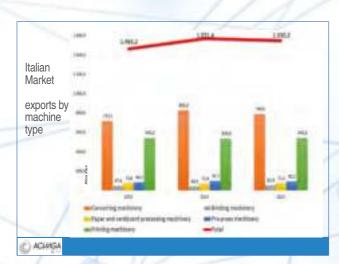
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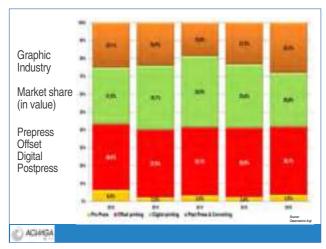
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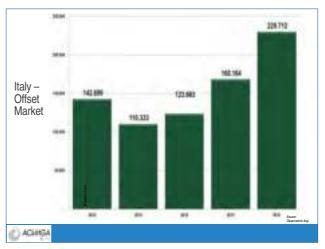


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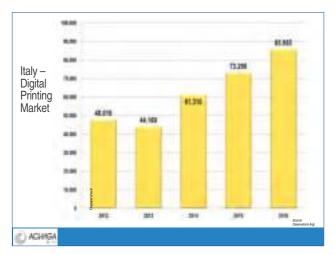


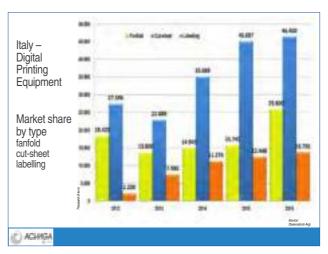
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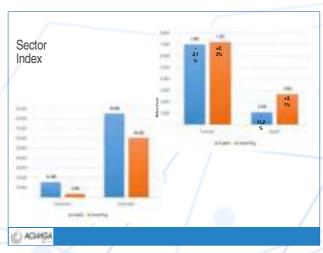
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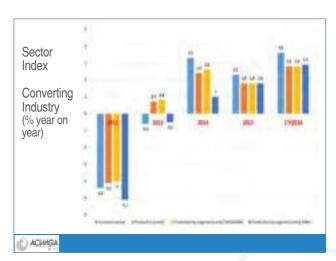


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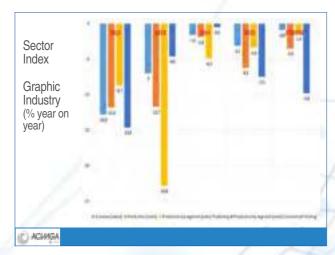
The printing offering in Italy (market trends)



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Note



#### THE GRAPHICS MARKET

- The average run lengh of Publishing and Commercial printing continues to decrease (giving way to digital printing)
- The traditional undercapitalization of graphic companies has led to the disappearance of many of them and the merge into groups with a higher consolidated turnover (this has given way to the renewal of equipment, as it can be seen in the offset data from the second quarter 2014 onwards)
- · Government economical/financial initiatives such as easy credit terms and hyper-amortizations (industry 4.0) address new investments



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#### INDUSTRIAL and WIDE FORMAT **MARKET**

- Digital Technology continues to grow in the industrial
- Italy, which has a great presence in the industrial districts of Textile, Ceramics and Furnitures, is widely using digital technologies (the switch has already happened in the ceramics sector)
- Luxury brands are showing an opposing trend. Their choice to increase quality pushes them to go back to the use of screen/analogue technologies (decorative market, luxury market)

E) ACHIGA

**MARKET** 

# Grazie

MARCO CALCAGNI - INFO@ACIMGA.IT

THE PACKAGING and LABELLING

End customers' demand is moving to more sofisticated products, with special and enhancing effects (and the answer lies with the increasing availability of analogue-digital hybrid equipment in the

Personalisation plays a role in big brands' choices (think of the recent campaigns by Nutella in Italy and Cola Cola in Italy and in the world)

The use of sophisticated counterfeiting systems and the interaction online-offline is having an impact on printing and converting companies which are building new software departments to manage data collected both from production lines and distribution chains.

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# **Introduction to Speaker**

# Mr. Ahmad Mughira Nurhani

President Indonesia Print Media Association

Dob: Jakarta 17 January 1970

**Education:** Bachelor of science, Class 1992, Dept. of Economics, College of Liberal Art, Oregon State University, Corvallis, Oreon, USA

#### Position:

- 1. President of Indonesia Print Media Association (PPGI) 2016-2021
- 2. President Director, PT INTERMASA Printing and Publishing
- 3. President Director, PT. Mandegani Nandangi Ardhi, Office Furnitures Industry
- 4. Chairman of Print@Indonesia Magazine





intro duc tion Population of 256 Million ■ Size of country: 1.90 million skm Consist of 17600 island. 13.000 inhabitats ■ More than 400 languages and ethnic tribes. ■ 5th populated country in the world, 1st in south Asia ■ Largest Democratic Nation in Asia. President elected directly by people

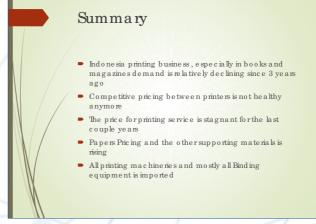
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#### Indone sia Printing industries Estimated Number of Offset Printing for Books and Magazines: 100 Big Company (more than 100 employees) ■ Thousands of Small and Medium Printing Shop for regular and daily administratives paper needs and printing in demands, spreading in all over Indonesia Mainly in Java Island Digital Printing is a growing market in Indonesia and very competitive pricing Offset Printing is not growing

The Demand of Books Printing in Indonesia ■ Government provides most text books from elementary level up to High School. ■ The Government spending in Text Books Budget in 2016 is a round US\$ 200 millions 2017 budget for printing text books is rise about US\$ 250 millions ■ All the books purchased by School through the National Online Store running by Government Institution

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# Indone sia Economic s Brief ■ 2016 Growth is 5.0 %. Claimed to be one of the most growing country in the region ■ 2017 Growth expected 5,1 % Direct foreign investment in Indonesia 2016: around US \$ 30 billions Investment in paper, papers goods and printing 2016: ■ Trade Balance Surplus 2016: US \$ 8,8 billions



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# **Introduction to Speaker**

Mr. Xu Jianguo

Chairman
Printing and Printing Equipment Industries Association
of China

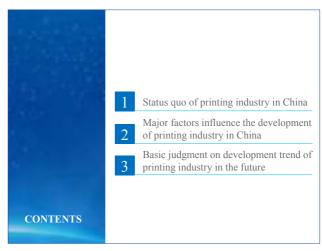
Mr. Xu Jianguo has successively held posts of Assistant Director, Deputy Director, Secretary of the Party Committee of Shanghai Light Industry Bureau; Deputy Secretary of the Party Committee of Shanghai Industry Bureau; Deputy Director of Shanghai Municipal Economic Commission; Deputy Secretary of the District Committee and Director of Baoshan District, Shanghai; Deputy Secretary of the District Committee and Director of Huangpu District, Shanghai; Deputy Secretary-General of Shanghai Municipal People's Government; Secretary of Party Leadership Group and Director of Shanghai Municipal Economic Commission; Secretary of the Party Committee and Chairman of Shanghai Electric (Group) Corp., ; Secretary of the Party Committee and Chairman of Shanghai Electric Group Company Limited; Chairman of the 6th Council of Printing and Printing Equipment Industries Association of China.



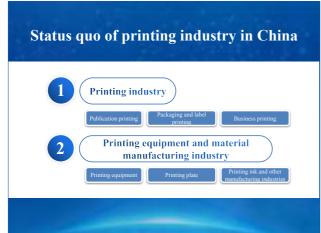








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#### 1.1 Status quo of printing industry in China

-	Number of saturation	Tred waste provy sen million	Make business intentio (CNY 1800 publishe)	AS MEDITORS (SCORE)
2008	12,600	3,957	1,477	114
2011	66,833	7,200	£138	291
2015	34517	8,671	22,548	208
Household growth ser (M-11)	5%	- 25%	38%	3%
Non-street protection ( IV-17)	4%	30N	11%	2%

It can be known by observing the development track of the industry in recent years that, 2013 is the turning point of the development of printing industry in the Mainland China. With the macroeconomic structural adjustment, the growth rate of printing industry in Mainland China began to slow down.

# 1.1 Status quo of printing industry in China

billion (USD \$166.1 billion\*) and 2.08 million of employees.  $^{\circ}$  In 2015, mean exchange rate of CNY to USD is USD 100 = CNY 622.84

240 % 15,000 39,000 people CNY 364.3 billion

From 2008 to 2013, annual income of main business of the printing industry in Mainland China had grown at a mean rate of 19%, increasing from original CNY 347.7 billion to CNY 833.8 billion. Five years of growth rate is up to 240%; Over the same term, the number of new printing enterprises increased 15,000, employees increased 390,000 and industry assets increased CNY 364.3 billion.

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#### 1.1 Status quo of printing industry in China



From 2013 to 2015, annual mean growth rate of main business income of printing industry had increased 11%, declined 8% than that of previous five years. Over the same term, the growth rate of industry employees and industry assets also showed the same trend. The growth rate of employees declined from 5% in previous five years to 3%, and the growth rate of industry assets declined from 15% to 10%.

- 7 -

#### 1.1 Status quo of printing industry in China



What are the characteristics of current printing industry?

In view of the limitation of statistical data, printing enterprises above designated size become the sample for us to observe and analyze the printing industry in China.

- 8 -

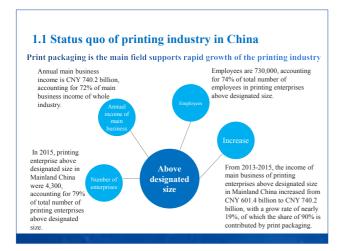
#### 1.1 Status quo of printing industry in China

Annual main business income is CNY 740.2 billion, accounting for 72% of main business income of whole industry.	E	The number of employees is 980,000 accounting for 47% o total number of employees of whole industry
In 2015, printing enterprises above designated size in China was 5,451. Accounting for 7% of enterprises in whole industry.	Above designated size	Industry assets of CNY 552,9 billion, accounting for 64% of total assets of whole industry.

# Note



# The 4<sup>th</sup> International Forum for the Development of Printing Industries



# 1.1 Status quo of printing industry in China Distribution of printing industry cluster based On manufacturing base According to the different sum totals of main business incomes of enterprises in all regions, the distribution of printing enterprises above designated size in Mainland China can be divided into four levels: (1) There are three regions with main business income exceeding CNY 60 billion (Guangdong, Shandong, Jiangsu); (2) There are eight regions with main business income ranging from CNY 30 billion to 60 billion (Henan, Anhui, Zhejiang, Sichuan, Hunan, Hubet, Jiangxi, Hebel); (3) There are six regions with main business income ranging from CNY 10 billion to 30 billion (Beijing, Tianjin, Shanghai, Fujian, Shaanxi, Guangxi); (4) There are 13 regions with main business income lower than CNY 10 billion (taloning, Jilin, etc.); The distribution above of printing enterprises above designated size is highly consistent with hot spot regions of manufacturing bases formed since the reform and opening up in Mainland on manufacturing base

hot spot regions of manufacturing bases formed since the reform and opening up in Mainland China. The computer, communication and other electronic equipment manufacturing industry, farm and sideline food processing industry, textile and garment, shoes and hat manufacturing industry, food manufacturing industry, wine and beverage manufacturing industry and modern logistics industry in rapid development raise the huge market demand for the development of printing industry in China.

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#### 1.1 Status quo of printing industry in China

Direct or indirect export accounts for a small proportion of overall business, so the printing industry mainly serves domestic market

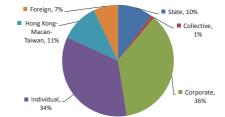


The proportion of export business (direct and indirect) in main business of printing enterprises will not exceed 20%. Therefore, the printing industry in Mainland China is mainly based on serving the domestic market.

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#### 1.1 Status quo of printing industry in China

Diversified investment and relatively high opening up



This is an industry composed of diversified investment entities. From 2013-2015, new capital of printing enterprises above designated size in Mainland China was CNY 28.8 billion, new capital, of which the individual capital accounted for 61% and corporate capital accounted for 33%.

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- 13 -

#### 1.2 Status quo of printing and equipment and apparatus manufacturing industry in China - Equipment

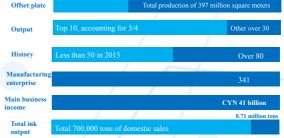
(1) Printing equipment manufacturing industry in China



Local printing equipment manufacturing enterprises of China have become major suppliers of printing industry in Mainland in prepress plate making equipment, gravure equipment, screen printing equipment, wide format spray printing equipment, post-press mould-cutting equipment and post-press bookbinding equipment, etc.



(1) Printing apparatus manufacturing industry in China



Ink export volume was 28,700 tons, from 2013, the export amount began to exceed import amount for three consecutive years

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# Major factors influence the development of printing industry in China in the future

- 2.1 Domestic macroeconomic growth trend
- 2.2 Pressure of environmental protection control
- 2.3 Influence of government industry access policy
- 2.4 Influence of Internet on domestic consumption demand

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#### 2.1 Domestic macroeconomic growth trend

Since 2015, economic trend in China fell back, single-quarter GDP year-on-year growth rate ran mostly in the lowest range since 2009, downward pressure of the economy continues to increase. In the past, the economic growth model of China was driven by factors, that is, it relied on increasing the input of factors (labor, land and capital) to maintain economic growth. Nowadays, the efficiency of factor input significantly decreased progressively. The crux causing the decreasing progressively of the efficiency of macroeconomic factor input is industrial structure.

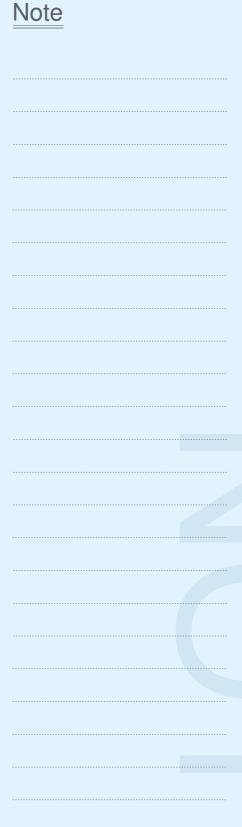
The economy of China is undergoing structural adjustment. This is a gradual process. From 2016-2020, the mean annual growth rate of GDP set in National Economic and Social Development Plan of China is 6.5%.



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#### 2.2 Pressure of environmental protection control

In recent years, the emergence of extreme weather and more and more serious haze in Mainland China is illustrating that the development mode to trade the GDP growth by sacrificing the environment has come to an end In June 2015, the Ministry of Finance, National Development and Reform Commission and the Ministry of Environmental Protection jointly promulgated the "Pilot measures for charging pollution discharge of volatile organic pollutants", decided to charge for pollutants discharging from pilot industry enterprises for discharging VOCs to atmosphere directly from October 1, 2015. Two industries of print packaging and petrochemical industry had been included in pilot industries to be levied for the VOCs pollutants discharging. At present, 17 local governments of provinces and municipalities in China have promulgated the local charge criterion for VOCs pollutants discharging. Some local governments even have extend fields of implementing the charge from print packaging to other fields of printing.





#### The 4th International Forum for the Development of Printing Industries

#### 2.3 Influence of government industry access policy

Mainland China executes the printing business license system. The "Regulations on the Administration of Printing Industry" (Revised Edition on February 6, 2016) issued by relevant government departments has been implemented. There are two important changes in the revised version of the Regulations:

The scope covered by the printing business license system is extended from the establishment of printing enterprises to being engaged in printing business activities, namely, the operational typesetting, plate making, printing, binding, printing-photocopying, printing and other activities;

the field in which the individual invests printing business activities is expanded from the publication printing to the publication printing and printing of package and decoration.

Printed material of package and decoration: It includes trademark sign, advertising and propaganda materials and the paper, metal, plastic and other printed matter used as product packaging and decoration. It covers all of printing of packaging and trademark and most If business printing. This means that the new regulations basically blocks new individual investors out of the traditional print field.



According to data provided in the "2016-07 Statistical report on development status of the Internet in China", up to the end of June 2016, the number of netizen of China had reached 710 million (Internet penetration rate was 51.7%).

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#### 2.4 Influence of Internet on domestic consumption demand



The influence of the Internet on consumption behavior of the younger generation is potential and profound

Basic judgment on development trend of printing industry in China in the future

> On one hand, it is the demand fluctuation caused due to low speed running of the economy in processes of domestic macroeconomic structural adjustment and growth mode transformation;

On the other hand, it is the cost increase of enterprise operation and the increase of the uncertainty of forward development caused due to environmental protection control and the change of industry access threshold.

- 3.1 Development trend of printing industry
- 3.2 Development trend of printing equipment and equipment and apparatus manufacturing industry

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#### 3.1 Development trend of printing industry

#### (1) Slow growth in the industry

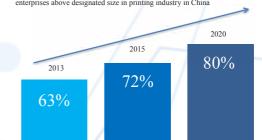
The mean annual growth rate of GDP set in National Economic and Social Development Plan of China (2016-2020) is 6.5%.Referred to the relevance of



#### 3.1 Development trend of printing industry

(2) Industry concentration enhances

The change of the proportion of main business income of printing enterprises above designated size in printing industry in China



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#### 3.1 Development trend of printing industry

(2) Industry concentration enhances

Publication printing will be the field with the fastest industry concentration growing. Over 90% of publications will be printed by publication printing enterprises (740) above designated size, and it is difficult for printing enterprises below designated size to survive in this field. Offset printing is still the main production means in this field.

Changes of government environmental protection policy and industry access policy will accelerate the capacity integration and layout adjustment among print packaging enterprises, to promote the industry to development towards largescale and professional direction.

**Publication printing** 

Government, policy

- 25 -

#### 3.1 Development trend of printing industry

(3) The role of Internet platform on the market integration appears gradually

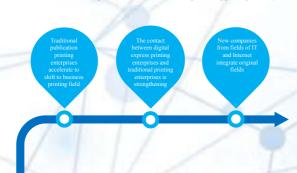


Business printing is one of the most active and most promising fields in printing industry in China. It is the key for future development of business printing enterprises to achieve the business mode transformation from the printing manufacturer to marketing service provider. And the Internet has created a platform and provided technical support for the integration of traditional printing mode and production mode of on-demand printing and communication production enterprises with consumer groups.

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#### 3.1 Development trend of printing industry

(3) The role of Internet platform on the market integration appears gradually





#### 3.2 Development trend of printing equipment and material manufacturing industry

How to seize opportunities provided by the economic transformation and technical progress in China, to play the advantage of local manufacturing industry being close to the market and understanding demands and adhere to the technical innovation on the basis of professional and being dedicated, will become the principal character of the future development of printing equipment and apparatus manufacturing in China

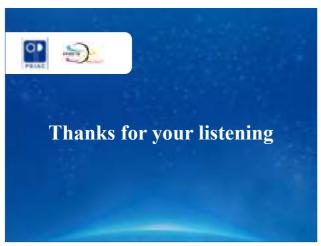
#### (1) Printing equipment manufacturing industry

Intelligent post-press system, inkjet printing equipment, environmental protection gravure equipment will become hot spots in the future development. And the professional and being dedicated to take full advantage of opportunities provided by the huge domestic printing market, be good at finding certain "pain spot" in industry processing chain and to concentrate resources to go all out to solve the "pain spot" will be effective path of the transformation and upgrading of local printing equipment manufacturing enterprises



3.2 Development trend of printing equipment and material manufacturing industry (2) Printing material manufacturing industry Main trend of printing material manufacturing industry in the future: Adapt to the demand of print packaging market to adjust further product structure. Printing plate manufacturing industry Printing ink manufacturing industry

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# Dialogue 1

Frontier Technology • Market Development • Future Trend

# Dialogue 1

Frontier Technology
Market Development
Future Trend



# **Introduction to Honored Guest**

# Mr. Robert Flather

**Chairman Printing Industry Confederation** 

Robert Flather is Chairman of PICON, the UK association of print related manufacturers and suppliers and has been on the PICON Council since 2008.

Robert has a degree in Mechanical Engineering and a Masters in Management Sciences. He worked in the steel industry before joining the printing industry, where he worked for Clays the book printers and Jarrolds the magazine and catalogue printer. He joined Kolbus UK in 1997 and became Managing Director in 1998 with responsibility for the UK, Ireland, France and Belgium. Kolbus is the global leader in the design and manufacture of industrial book and magazine binding machinery for both traditional and digitally printed products.

He is also a member of the Court of The Stationers' Company, the City of London Livery Company for the Communications and Content Industries, and Chairman of it's charity, the Stationers' Foundation.

# Mr. Lu Chang'an

Vice Chairman

Printing and Printing Equipment Industries Association of China

Mr. Lu Chang'an has successively held posts of Technician of Foundry Shop and Director of Enterprise Management Department, Beijing People's Machinery Factory; Chief Economist and Deputy General Manager of BeiRen Group; General Manager of BeiRen Printing Machinery Holdings Ltd.; General Manager of BeiRen Group; Vice President and Secretary General of the 6<sup>th</sup> Council of Printing and Printing Equipment Industries Association of China.





## Mr. Marco Calcagni

**President** 

Italian Manufacturers Association of Machinery for the Graphic, Converting and Paper Industry

entrepreneurs and managers" course at WONDERFUL; courses held by Ambrosetti dealing with corporate communication, leadership, corporate strategy and business development. Other courses dealing with controlling, accounting and sales contracts. Certified Trainer Manager.

#### Work Experience:

Acquired professional experience at OMET Srl: from 1987 to 1991 worked as installation technician on travelling assignments; up to 1993 post-sales director; from 1993 to today sales and marketing director; since 2000 Vice-President of OMET China and since 2012 Vice-President of OMET Americas, Inc.

#### Current Roles in Trade Associations:

Since 2013 President of A.C.I.M.G.A., Milan (Italian Manufacturers Association of Machinery for the Graphic,

Converting and Paper Industry); Board Member of A.T.I.F. Milan (Italian Technical Association for the Development of Flexography) and FEDERMACCHINE. President of C.P.A. (a holding of A.C.I.M.G.A. Promotional Center) and Board Member of the "CLUB TECNOLOGIA e PASSIONE" group.

#### **Professional Skills:**

10+ year experience in corporate business in the industry of printing machinery for converting, packaging as well as for napkins and related products. Strong relational skills, both within the group with a decision-making and strategic role and on the market with negotiation and marketing activities. Positivity, passion for work, curiosity, resourcefulness are some of the qualities that enable me to carry out activities by involving my coworkers in achieving efficiency and effectiveness objectives.

#### Studies:

In 1985 obtained a diploma as mechanical technician. In the 90's evening English and German language courses at Istituto Europa; "Corporate strategy and business development" course at CESMA. In the 2000s "Strategy and success for

# Mr. Masato Atoda

**Associate Director** 

Tokyo office, Asia Pacific Headquarters of Keypiont Intelligence

Mr. Masato Atoda is an Associate Director in the Tokyo office, Asia Pacific Headquarters of Keypiont Intelligence. Since joining InfoTrends in 1999, he has conducted numerous studies on the Japanese POD market including POD hardware, POD software, wide format devices, color proofer, print image quality evaluation, printing cost analysis, and ink jet head application. Mr. Atoda has also conducted projects in other digital imaging area such as document image scanner market analysis, MFP end user needs analysis, digital still camera market sizing, long term strategy development consultation for an imaging manufacturer, etc. during more than 10 years in InfoTrends.

Before joining InfoTrends, Mr. Atoda worked for a trading company of electronic devices for audio equipments and an American page printer manufacturer. In the page printer manufacturer, Mr. Atoda engaged in the product/communication marketing as a manager.

Mr. Atoda holds a B.A. degree from Meiji University, Tokyo.





# Mr. Wu Yongqiang

Vice General Manager Beijing Zhongke Liyan Technology Development Co., Ltd.

#### **Major Education:**

Mr. Wu Yongqiang has majored in further education of printing technology course in Shanghai Publishing and Printing Junior College, and studied in the Leadership Development Course of the Continuing Education College of Tsinghua University.

#### Work Experience:

In February 1975, Mr. Wu Yongqiang entered the printing industry, worked in former Guangdong, Foshan Color Printing Plant, which is now the central enterprise Huaxin (Foshan) Color Printing Co., Ltd. with shares held by China Paper Group, and he has been working in printing and packaging industry for 42 years.

He now holds Vice General Manager of Beijing Zhongke Liyan Technology Development Co., Ltd., to be directly involved in the industry-wide development application project of water-based printing ink for plastic film gravure printing, having now made the major technological breakthrough and entering the mass production phase.

# Mr. Lu Weidong

Vice President, Beijing Founder Electronics Co., Ltd. General Manager, Beijing Founder Easiprint Co., Ltd.

#### Education:

1991-1995, Bachelor degree of Beijing Institute of Graphic Communication, printing machine design and manufacturing.

#### Work Experience:

2002-2012, Vice General Sales Manager of North China, CTP Product Manager of graphic arts department, Vice General Manager of commercial sales in electronic publishing department, general manager of digital printing business department in Beijing Founder Electronics Co., Ltd.

2013, Assistant President of Beijing Founder Electronics Co., Ltd. and General Manager of Beijing Founder Easiprint Co., Ltd.

2014 - now, Vice President of Beijing Founder Electronics Co., Ltd. and General Manager of Beijing Founder Easiprint Co., Ltd.





# Ms. Li Yanqiu

Vice Chairman & General Manager Beijing Shengtong Printing Co., Ltd.

Ms. Li Yanqiu is one of founders of Beijing Shengtong Printing Co., Ltd., currently serving as Vice Chairman and General Manager of the Company. Founded in November 2000, Shengtong Share is a listed company dominated by the publication, and there are six wholly-owned subsidiaries serving under its banner, of which the business involves publication printing, package printing, quality education, supply chain management and other fields.

Since her managing the Company, by virtue of her rich knowledge and management experience in printing industry, strong appeal and unique personal charm, she has nurtured and led the progress of Shengtong team. Just a few years, under her leadership, Shengtong has developed steadily and rapidly, and its total assets scale has developed rapidly from CNY 200

million in 2007 to over 1.16 billion and over CNY 800 million of output value, annual profits and taxes paid have reached over CNY 60 million. At Present, Shengtong ranked in the front of domestic books and periodicals printing enterprise ranking list. Shentong obtained three consecutive sessions of "China Government Prize for Publish", the first batch of "National Demonstration Enterprise of Printing and Duplication" and other qualifications and honorary titles.

In 2013, Ms. Li Yanqiu was granted the "The 12<sup>th</sup> Prize for Bisheng Print Outstanding Newcomer" by China Printing Technology Association; In 2016, she was granted the "Beijing Leading Talent of Press, Publication, Radio, Film and Television" by Beijing Municipal Bureau of Press, Publication, Radio, Film and Television.

# Dialogue 2

The Belt and Road • Seeking for Opportunities • Cooperation for win-win

# Dialogue 2

The Belt and Road
Seeking for Opportunities
Cooperation for win-win



## Mr. H V Sheth

President IPAMA

Mr. H V Sheth is managing director of Sheth Printograph Pvt Ltd., is a well renowned personality of Indian and International Printing, Packaging and Graphic Arts industry. He started his own business in 1963, DAYA PRINTOGRAPH, with his elder brother to manufacture steel composing furniture equipment, melting furnace, dampening, roller washing and later progressed to Laminating, Finishing & Paper converting machines. Brand DAYA PRINTOGRAPH was an established brand name to recognise in India with offices in all four corners. The dynamism of Mr Sheth's management, his far-sighted acumen of business and vision has put his organisation on a global map.

In his struggle, however, Sheth has not forgotten his fellow industry players. He is the man who sowed the seed to form association called IPAMA in 1988 whose objective is to uplift the Indian print industry with respect to its manufacturing capability and enhance brand "India" on international platform.

#### Mr Sheth has served IPAMA as:

- Founder member and 1<sup>st</sup> honorary General Secretary 1988-1990
- General Secretary 1990-1993
- President 2006-2008 and Present President, term 2016 18
- Governing Council Member 1998-2017

With experience and dedication of serving this industry for 50 years, Mr Sheth has witnessed all Four genres of this Printing- Litho, Letter Press, Offset, Digital and forthcoming Nano technology.

# Mr. Ahmad Mughira Nurhani

President Indonesia Print Media Association

Dob: Jakarta 17 January 1970

**Education:** Bachelor of science, Class 1992, Dept. of Economics, College of Liberal Art, Oregon State University, Corvallis, Oreon, USA

#### Position:

- 1. President of Indonesia Print Media Association (PPGI) 2016-2021
- 2. President Director, PT INTERMASA Printing and Publishing
- 3. President Director, PT. Mandegani Nandangi Ardhi, Office Furnitures Industry
- 4. Chairman of Print@Indonesia Magazine





# Mr. Min Han

Chairman

**Myanmar Printers & Publisher Association** 

#### **Areas of Expertise**

Printing Industry

Publication industry

Packing industry

Advertising industry

#### **Professional Experience**

1989-present, Proprietor of MGT Printing & Packaging Co., Ltd.

2015-presen, Chairman of Myanmar Print & Pack Public Co., Ltd.

#### **Social Activities**

2014-present, Chairman of Myanmar Printers & Publisher Association (MPPA)

2016-present, Treasurer of Myanmar Press Council

2009-2013, Treasurer of MPPA

2015-present, Executive committee member of UMFCCI

#### Education

Bachelor of Engineering (Stastistics), Yangon Institute of Economics

## Basit M.A. Zaidi

Senior Vice Chairman Pakistan Association of printing & Graphic Arts Industry

#### SINCE 1981, MIGHTY DEALS, Propreitor

Started a small printing company, today a major supplier to exclusive government and private organizations.

#### For the year 2016-17, Elected Senior Vice Chairman for PAPGAI

Member of Exhibition Council Printpak 2017

Organized multiple vocational programs for skilled labor and management of print industry

Printing industry survey conducted and published industry wide

#### 2013 and 2015, Elected Vice Chairman

Member of Exhibition Council Printpak 2015

Member of FPCCI (Federation of Pakistan Chamber of Commerce and Industry) liaison committee for printing industry

Member KCCI (Karachi Chamber of Commerce and Industry)

Represented Pakistan and PAPGAI in Asia print in 2013, 2015, and 2016





## Mr. Bobak Abedin

Chairman

Iran Print Industry Exporters Union

#### **Professional Profile:**

Iran Print Industry Exporters Union (IPIEU):

Chairman, 2010 to present

Vice Chairman, 2007-2010

Treasurer, 2003-2007

Tehran Printers Association:

Secretary General, 2014 to present

Expert mediating panel, 2004 to 2012

Association of Official Experts:

Official Expert in Printing and Packaging Industry, 2012 to present

Iran Chamber of Commerce, Industry, Mines and Agriculture:

Board of Representatives, 2005 to present

Vice Chair of IT Commission

Head of Media Economics

Cyan Iman Group: Chairman 2002 to present

Safa Print Co.: President 1994 to present

Cybak Publishing Co.: President 2004 to present

Tehran Printers Cooperative: Board of directors 2009 to 2012

#### **Education:**

1989-1993 Montclair State University, New Jersey, BS

1993-1994 Montclair State University, New Jersey, MS

2013-2014 Baden-Wuerttemberg Cooperative State University

EMD (Event Management Degree)

# Mr. Nguyen Van Dong

President Vietnam Printing Association

#### **Education:**

Bachelor's degree, The Moscow State University of Graphic Arts (MSUPA)

#### **Experience:**

1975 - 1987: Department of Publishing, Printing and Book distribution

1987 - 2012: CEO, Tran Phu Printing Company

2012 - 2017: CEO, BMO, Minh Phuc Print & Pack Co.

2001 - 2006: Vice President, Vietnam Association of Publishers,

Printers & Book distributors

2005 - 2006: Vice President, ASEAN Book Publishers Association (ABPA)

2006 - 2017: President, Vietnam Printing Association (VPA)

2016 - 2017: Vice Chairman, ASEAN Printing Association (AP)





## Mr. Liu Keli

**Chairman Shanxi Yuncheng Plate Making Group** 

Chairman of Shanxi Yuncheng Plate Making Group; member of CPPCC National Committee; National May 1 Model Worker, National Model Worker in Light Industry System, and National Excellent Operation Manager; Shanxi Excellent Entrepreneur, Model Worker of Shanxi, and Executive Director of Shanxi Entrepreneurs Association; won the Decennial Outstanding Contribution for Gravure Printing Industry; Senior Economist.

Yuncheng Plate Making Group is the world's largest gravure manufacturing enterprise, has 114 subsidiaries in the world, which is one of national Top-500 economic benefit enterprises and national Top-200 in light industry system, granted the "Provincial and Prefectural Advanced Enterprise" "Star Enterprise" "National High-tech Enterprise" "AAAA Level Credit Enterprise" "Leading Tax Payment Enterprise" and other honorary titles for successive years.



# Report on Indian Printing And Packaging Industry

by H V Sheth/President, IPAMA

#### Indian GDP & PPP

The Indian economy is fast moving under the new leadership of the country. The Indian economy advanced 7 percent year-on-year in the last three months of 2016, slowing from an upwardly revised 7.4 percent rise in the previous quarter but beating expectations of a 6.4 percent growth. The expansion was mainly driven by a surge public spending and agriculture. The GDP is expected to grow 7.1 percent in the fiscal year ending in March 2017.

The World Bank had announced in a report that India overtook Japan as the world's third largest economy in terms of purchasing power parity (PPP) while USA and China are/were holding first and second positions respectively in ranking. According to International Comparison Program (ICP) data of the World Bank, India had 6.4 per cent share of global GDP on a PPP basis. There are strong and positive indications that the GDP of India will further improve during 2017-18 in comparison to previous years. The economic growth has been driven by the expansion of services that are growing consistently faster than other sectors.



GDP Growth by Country 2016

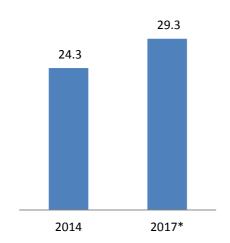
> 7%

■5%~7% ■3%~5%

2%~3%

#### Indian Printing Industry

As far as the Indian Printing industry is concerned, it is on the right track. It is one of the biggest and fastest growing sectors in India. It is estimated that more



Size of Indian Printing Industry (Unit: Billion US\$)
Remarks: \*Estimated

than 2, 50,000 printing presses of small, medium and large sizes exist in India with a capital investment of over US\$ 2 Billion. Giving an optimistic outlook of the industry, the packaged printing industry is growing at an annual rate of 17%, commercial printing at an annual rate of 10-12% and digital printing at a robust growth rate of 30%.

The size of the Indian Printing Industry is estimated at USD 29.3 billion in 2017 up from USD 24.3 billion in 2014. The total print products industry will continue to grow at an annual rate of 6.8% over the year 2017.

The two sectors of the Indian Printing Industry which are projected to grow the most in India are Packaged Printing and Published Printing. Packaged printing will grow more rapidly at a rate of 7.8% in 2017. The market size of the packaged printing sector will increase from USD 10.2 billion in 2014 to USD

12.7 billion in 2017, and will comprise of 43% of the total print product sales in 2017. The growth of packaged printing will be driven by an increasing demand for non-commodity consumer goods in developedcountries in the Asia-Pacific region that are slowly shifting from producer countries to consumer countries(especially China).

Published Printing's market size will grow from USD 3.9 billion in 2014 to USD 4.5 billion in 2017. This growth is primarily due to increase in population, higher rate of literacy and a growing economy. Countries like UK, USA and Japan outsource printing jobs to India because of the low cost of labour, English language proficiency, design capabilities, talent pool, technology and communication costs. India's geographical location adds to its advantage in order to do business with the east or the west.

Print packaging globally will continue to grow at an average annual rate of 5.2% in 2016-20, just below the 5.3% rate over 2011-2015, reaching USD 286 billion by 2020. The highest growth in 2016-20 will come from countries in Asia-Pacific, owing to India, Indonesia and Vietnam. At the moment, Asia-Pacific is the largest regional market for print packaging, accounting for over 42% of revenues in this study, and will be the second fastest-growing region, expanding 6.7% in 2016-20.

India is quickly rising in the ranks of the print packaging industry and has climbed from the eighth largest market in 2011 to fifth in 2016. As per Thayer Long's Presentation, president, NPES, "By 2020, India will become the fourth largest market, ahead of Germany, and at this rate, shortly after the 2020, India will surpass Japan, becoming the third largest market."

The flexible print packaging market in India is much larger than the folding carton market. However, the folding carton segment in India is still sizable because of exports, particularly in luxury goods and cigarettes.

# Printing and Packaging Machine Industry

At one point of time, printing and packaging machines used to be imported from different countries. However, as on date, a very large number of companies are now engaged in manufacturing different types of

printing, packaging and allied machinery and are exporting to different countries, even though India still import different types of machinery to meet the domestic requirements.

The domestic and export of Indian Printing and Packaging Machine Industry is USD 2.57 billion during 2015 -16.

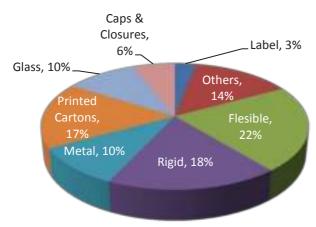
# Make in India by NDA Government

India has already marked its presence as one of the fastest growing economies of the world and is also one of the top 3 attractive destinations for inbound investments. Now with more emphasis on 'Make in India', the nation aspires to increase the share of manufacturing in the country's GDP from 16% to 25% by 2022. Make in India is one of the ambitious projects of the Government of India which has been designed to facilitate investment, foster innovation, enhance skill development, protect



Turnover of Printing & Packaging Machine Industry (Unit: Billion US\$)





Indian Packaging Industry

intellectual property and build best-inclass manufacturing infrastructure. The Government of India has also opened up some more critical sectors like Defense, Railways etc for FDI.

#### Indian Packaging Industry

The Indian packaging industry itself is growing at 14-15% annually. This growth rate is expected to double in the next two years.

According to the Indian Packaging Institute, Indian Packaging industry is USD 14 billion and growing at more than 15% p.a. These figures indicate towards a change in the industrial and consumer set up.

The growth in the packaging industry in India is mainly driven by the food and the pharmaceutical packaging sectors. The large and growing Indian middle class, along with the growth in organized retailing in the country are fueling growth

in the packaging industry. Another factor, which has provided substantial stimulus to the packaging machinery industry is the rapid growth of exports, which requires superior packaging standards for the international market. With this the need for adopting better packaging methods, materials and machinery to ensure quality has become very important for Indian businesses.

The Indian packaging industry is dominated by plastic flexible packaging. The traditional rigid packaging users have also been seen to shift to flexible packaging in recent times. According to industry sources, the main reason for this is that flexible packages are found aesthetically attractive, cost-effective and sturdy. Consumer preference for the use of convenient packaging and packaged products in affordable quantities in laminates is also one of the main reasons that have contributed to the growth of flexible packaging in India.

The food-processing sector is the largest user of flexible packaging, accounting for more than 50 percent of the total demand. The flexible packaging segment is estimated to be growing at over 35 percent annually. Major players in the flexible packaging sector are Paper Products Ltd. and Flex Industries.

# IPAMA's Contribution to Indian Printing Industry

IPAMA is an Apex body of manufacturers of Printing, Packaging and allied Machinery and represents 80% of the all India industry. It is an active member of the Committee for Indian Standards for Printing Industry under the aegis of Bureau of Indian Standards. IPAMA plays a vital role in formulating policies for printing & packaging industry to Government of India.

As IPAMA is the spokesman of the Indian Printing & Packaging Machinery Industry, the Association is absolutely and totally dedicated to one point program: Promotion of the Indian Graphic Arts industry. Apart from functioning as a dependable data bank and centre for dissemination of information on latest market perspectives, technology and equipment, the Association acts as a big

Show Window.

Besides the various activities of the Associations, IPAMA is the organizer of biggest exhibition in Graphic Art Industry in India, i.e PRINTPACK INDIA. This is a Biannual event happens mostly in the month of February. The exhibitors of PPI know very well that their products will be checked and evaluated by potential customers. Serious visitors to PPI come as a rule with concrete problems in their minds and precise expectations. It is for this reason PPI has established itself as a launching pad for new technologies and services.

The 14<sup>th</sup> edition of PRINTPACK INDIA series, PRINTPACK INDIA 2019, an international event, is slated for 14th to 20th February, 2019\* at India Expo Centre & Mart, Grater Noida, NCR Delhi, India.

To promote the Industry, IPAMA has also been jointly organizing international exhibitions PRINTPACK ARABIA in Sharjah, U.A.E, in collaboration with Sharjah Chamber of Commerce & Industry, with a view to exploring the possibilities of exports for the Indian Printing machinery in UAE, CIS & neighboring African countries.





# Report on Printing and Packaging Industry of Pakistan

by Basit M.A. Zaidi/Senior Vice Chairman, PAPGAI

#### **Economy of Pakistan**

The economy of Pakistan is the 25<sup>th</sup> largest in the world in terms of purchasing power parity (PPP), and 43<sup>th</sup> largest in terms of nominal gross domestic product. Pakistan has a population of over 200 million (the world's 6<sup>th</sup>-largest), giving it a nominal GDP per capita of \$1,429. Pakistan is a developing country and is one of the Next Eleven, the eleven countries that, along with the BRICS, have a potential to become one of the world's large economies in the 21st century. The economy is semi-industrialized, with centres of growth along the Indus River. Primary export commodities include textiles, leather goods, sports goods, chemicals and carpets/rugs.

The World Bank predicts that by 2018, Pakistan's economic growth will increase to a "robust" 5.4% due to greater inflow of foreign investment, namely from the China-Pakistan Economic Corridor. According to the World Bank, poverty in

Pakistan fell from 64.3% in 2002 to 29.5% in 2014. Pakistan's fiscal position continues to improve as the budget deficit has fallen from 6.4% in 2013 to 4.3% in 2016.

# Insight on Pakistan Printing Industry & Trade Exhibitions

Pakistan is a developing country, thus, the requirement of Printing & Packaging is increasing accordingly. Due to its best geographic position, Pakistan has a lot of potential of exports. PAPGAI (Pakistan Association for Printing and Graphic Arts Industry) are looking for an easy access for our products to the Central Asian markets to double our growth. We are setting standards for our Industry so that it can cope up easily with International practices. We always keep an eye on technological aspects of printing so that we can compete in the global market. Pakistan has skilled human resource and we see a bright future in the Printing & Packaging Industry of Pakistan. We believe with the passage of time and with consistent increase in per capital income the consumption of packaging material in Pakistan will improve, leading printing industry along with other industries to boom.

Printing industry is based mostly in the big cities of Karachi, Lahore, Islamabad and Faisalabad. The printing presses however are spread all across the country. In Karachi alone there are more than 3000 small, medium & large printing units. All over the country there are altogether 15,000 registered units which

include offset, flexo, gravure, digital printing and screen printing.

Pakistan mostly imports Printing and Packaging machines from abroad. However, few companies are now engaging in manufacturing corrugated, paper cutting, die cutting, perfect binding and graver printing machines which have gain popularity among printers.

Pakistan Association of Printing & Graphic Arts Industry (PAPGAI) is making continuous effort in promoting awareness about the industry and valuable services that are provided by the industry to its clients, with respect to the contribution it does to the economy of the country. This contribution to the economy is in the form of taxes, provision of employment opportunities, to both skilled and unskilled, and skill development of people associated with the industry. This is achieved by collaborating with reputable institutes of high standards.

#### Pakistan Association of Printing & Graphic Arts Industry (PAPGAI) Exhibitions by the name of PrintPak

PAPGAI organized 9th edition of printing and packaging exhibition at Lahore. PrintPak 2014 was held on 28th to 30th November 2014 in Expo Centre Lahore. PrintPak 2014 attracted 25,000 visitors and led to agreements that were made between suppliers and printers. The

exhibition draws attention to both local and foreign companies and their representatives. The response encouraged exhibitors for announcing their participation in the PrintPak 2015.

Last year, PAPGAI organized 10th edition of printing and packaging Glimpse of PrintPak 2015 exhibition in Karachi. PrintPak 2015 which was a very successful event held at expo centre Karachi from 21-23 November 2015 in halls 1, 2 & 3 the PrintPak 2015 was an event which will be remembered. The exhibition saw participation and attendance from printers all over Pakistan and abroad. There were 130 National & International principals/exhibitors represented their organizations. Leading sectors participated: Printing, Graphic Arts, Industrial Automation, Paper, Ink, Packaging & Technical Education Sectors. More than 30,000 visitors visited at Expo Centre Karachi. High profile dignitaries including Commercial Attachés, Council Generals, Government Officials, CEOs, Consultants and other top decision makers from the industry visited as Guest of Honors. The event had 22 professional seminars. Almost all exhibitors were encouraged to announce their presentation in the next event.

The 11th edition of PrintPak 2017 will be held on 18 to 20 November 2017 at











Expo Centre Karachi. Website www. printpakexpo.com.

The 12<sup>th</sup> edition of PrintPak is scheduled be held in 2019 at Lahore expo center, exact dates will be announced later.

# Salient Features of Printing & Packaging Industry of Pakistan

Printing & Packaging Industry of Pakistan can be classifed into following main catagories:1.Folding Cartons on Coated Duplex Boards and Folding Box Board etc; 2.Printing / Publishing / POS Materials etc. on Writing Printing Paper and Art Paper / Card etc.;3. Corrugated Cartons Making Industry; 4.Flexible Packaging Industry.

Some Salient Features of Printing & Packaging Industry of Pakistan			
Population of Pakistan	200 Million		
Consumption of Paper & Paperboard Products	1.6 Million Tons / Annum		
Per Capita Consumption of Paper & Paperboard products	8 kgs		
Consumption of Flexible Packaging	0.6 Million Tons / Annum		
Per Capita Consumption of Flexibles	3 kgs		
Growth Trends			
Printing Packaging on Paperboard & Corrugated Cartons	9%		
Flexible Packaging	12%		

Turnover of the Printing and Packaging Industry	PKR (Millions)	US\$ (Millions)
Domestic Paper & Paper Board Production	89,000	848
Imports of Paper & Paperboard Products	55,000	524
Total	144,000	1,371
Value Addition by Printing & Packaging Industry	58,000	552
Turn Over of Printing & Packaging Industry (Paper & Paperboard)	202,000	1,924
Turn Over of Flexible Packaging Industry	252,000	2,400
Total Turn Over of Printing & Packaging Industry of Pakistan	454,000	4,324

Consumption of Various Grades of Paper & Paperboard			
Product Category	Total	Domestic Supply	Imports
One Side Coated Packaging Board	360,000	270,000	90,000
Writing & Printing Paper	255,000	177,000	78,000
Container Board	490,000	431,000	59,000
Art Paper & Art Card	72,000	_	72,000
Newsprint	92,000	+ 1	92,000
Tissue Paper	17,000	15,000	2,000
Liquid Packaging	49,000	17,000	32,000
Others	265,000	140,000	125,000
Total	1,600,000	1,050,000	550,000



# **Overview Of Vietnam Printing Industry**

by Nguyen Van Dong/President, Vietnam Printing Association

As of today, Vietnam printing industry is a sum of more than 3,000 enterprises with the annual revenue of 3 billion USD (2016), mostly from domestic production. Export is very limited that covers only 1-2% of total revenue. The annual growth is 5-10%. Labor in printing is around 50,000 people. Printing capacity mostly concentrates on 2 biggest cities Hanoi (20%) and Hochiminh City (60%). The remaining 20% is shared among other regions.

Ownership structure of Vietnam printing industry consists of private sector (80%), government-owned (10%) and foreignowned (10%).

#### **Product Diversification Includes:**

- 1. Books: contributes 8% to total printing capacity. Vietnam now has 64 publishers with 32,000 titles a year. Printed books are being seriously competed by digital and online products which results in a reducing in demand even though digital books are yet very popular in Vietnam.
- 2. Newspapers and magazines (periodical publication): covers 12% of total printing capacity. This area is being

under strong attack and serious affected by the Internet and online readings. At the moment, the market is offering nearly 1,000 different titles but the circulation of many of these has declined sharply by 30-50% since the last decade.

- 3. Label and packaging printing: shares 70% of total printing capacity. This is the fastest growing sector in Vietnam at the moment due to strong increase in goods production, especially domestic, food and electronic industry.
- 4. Others: holds 10% of total in printing capacity.

#### **Technology Trend:**

Offset printing: makes up 75% how Vietnamese printers operate but this printing method is slowly reducing in popularity.

Rotogravure: mainly used in label and packaging printing, including soft and hard packaging. The popularity of this technology is about 15%.

Flexography: this method is now widely used in label printing due to high demand in quality improvement of commercial products.

Digital printing: digital printing in Vietnam now is still not as developed as other countries but expected to develop very strong in the near future.

Investment trend: yearly investment for printing industry in Vietnam is believed to be about 130-200 million USD. Today, Vietnam has shifted the focus from buying refurbished technology to new and latest technology.