The Developing Status & Transformation Trend of China's Printing Industry

- **Chang Xiaoxia**

Vice President of The Printing Technology Association of China
General Manager of Beijing Keyin Media & Culture Co.,Ltd.

Content

Status of China’ s Printing Industry

Developing Features in Recent Years

Industry Transformation and Exploration

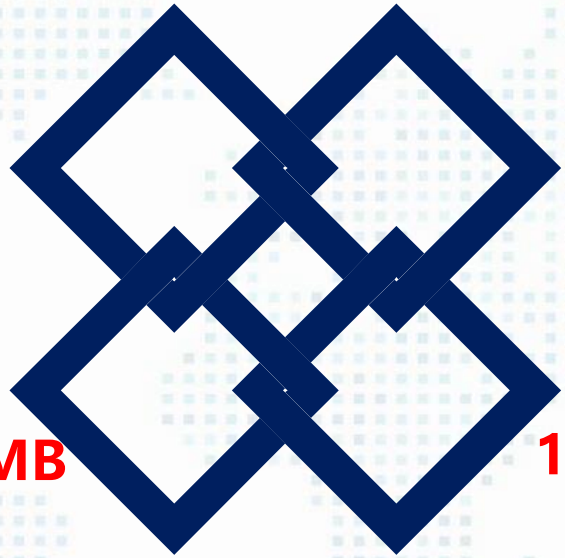
01

Status of China’s Printing Industry

Overall situation

98,000
Printers

2.704 Million
Employees



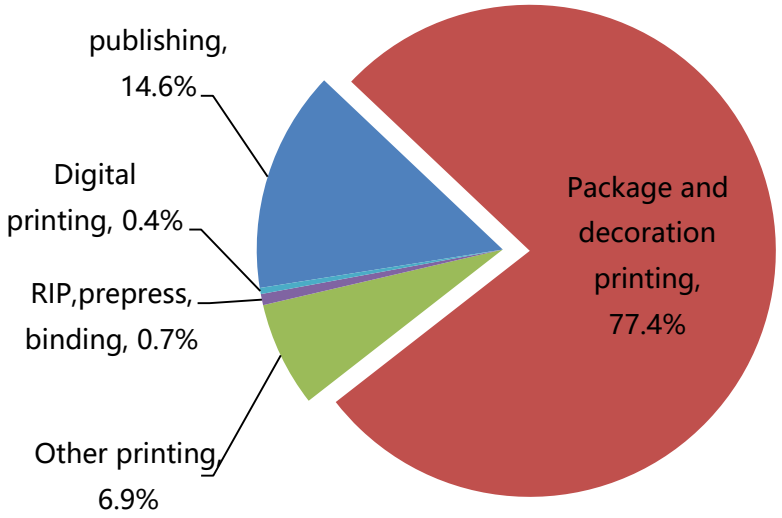
1.27 trillion RMB
Total Printing Output

1.52 trillion RMB
Total Assets

Until the end of 2018

Overall situation

China’s Printing Industry Segments



Overall situation

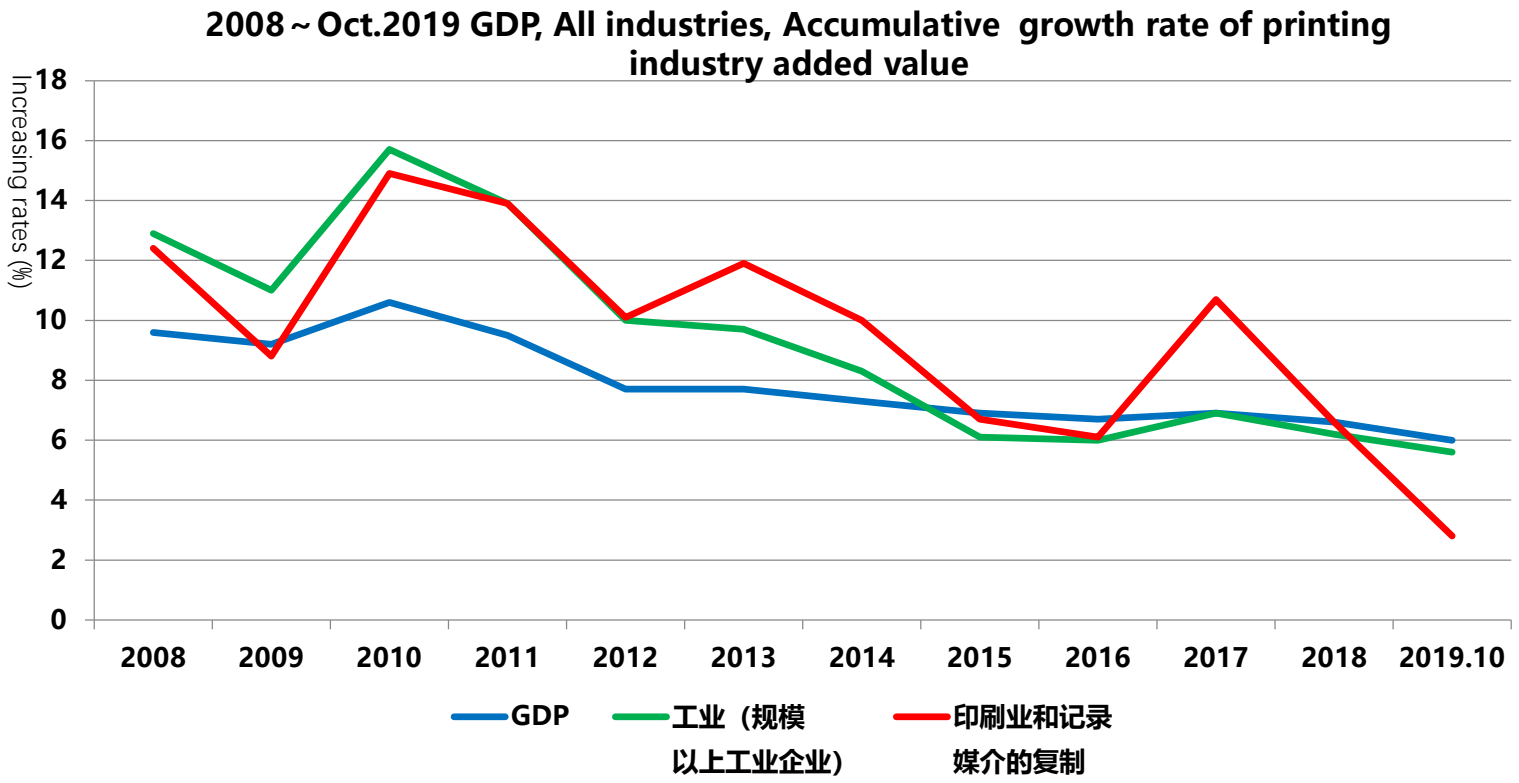
- From the perspective of geography, China’ s printing presents obvious characteristics of the **industrial belt** 。

The Pearl River Delta with Guangdong as the center

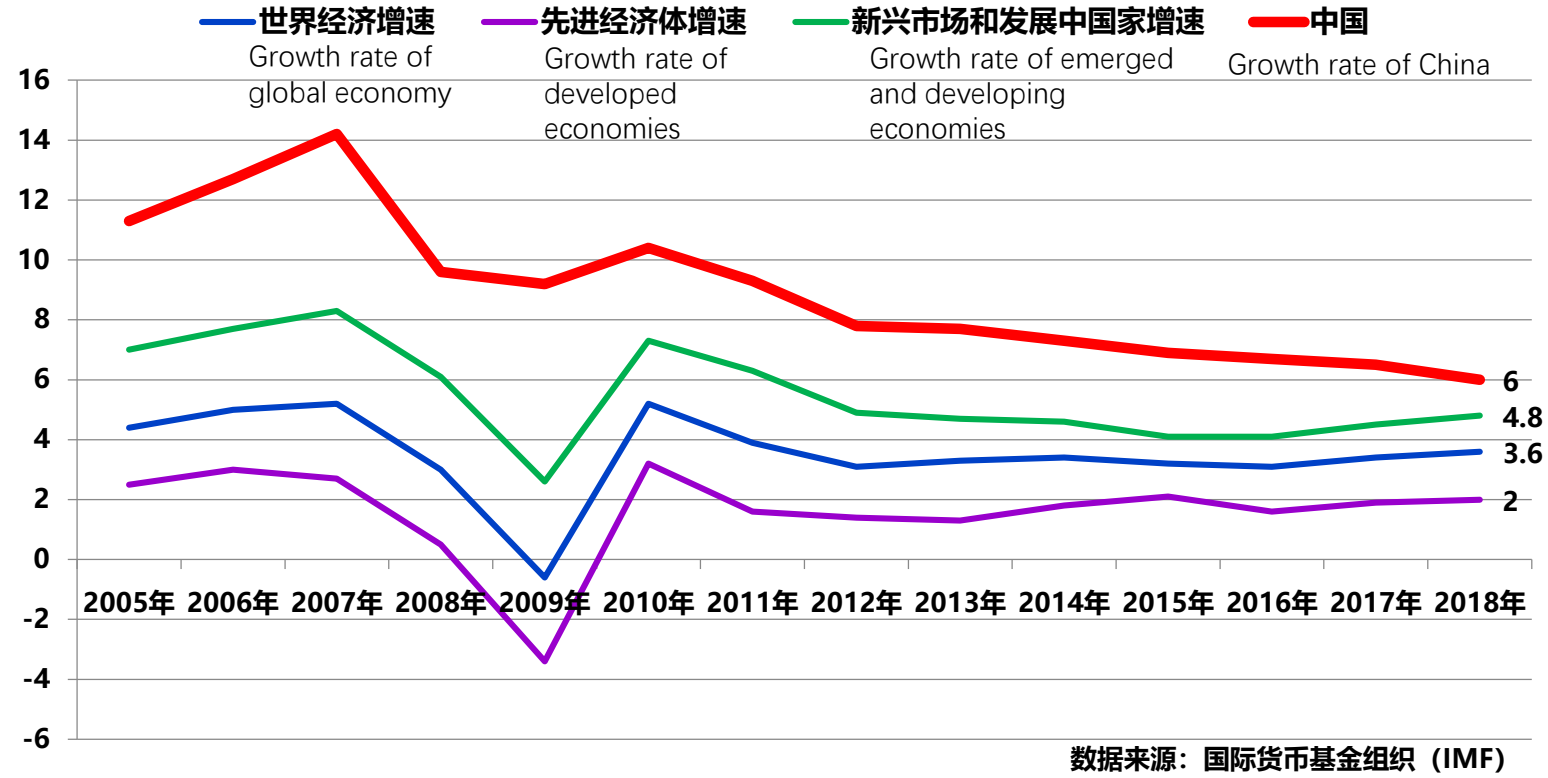
The Yangtze River Delta with Shanghai, Jiangsu and Zhejiang as the center

The Bohai Rim with Beijing and Tianjin as the center

Developing trend in recent 10 years



See China's development from global perspective



02

Developing Features in Recent Years

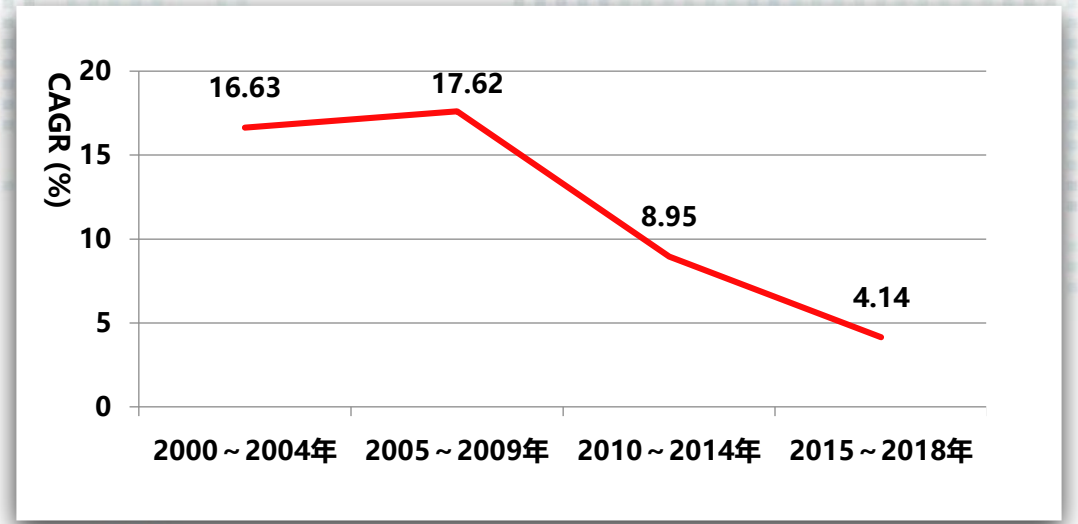
Developing features in recent years

科印传媒® Keyin Media

- Growth rate slows down
- Intensiveness needs improving
- Fierce competition accelerates industry restructuring
- Labor cost rises
- Responsibility for environment protection increases

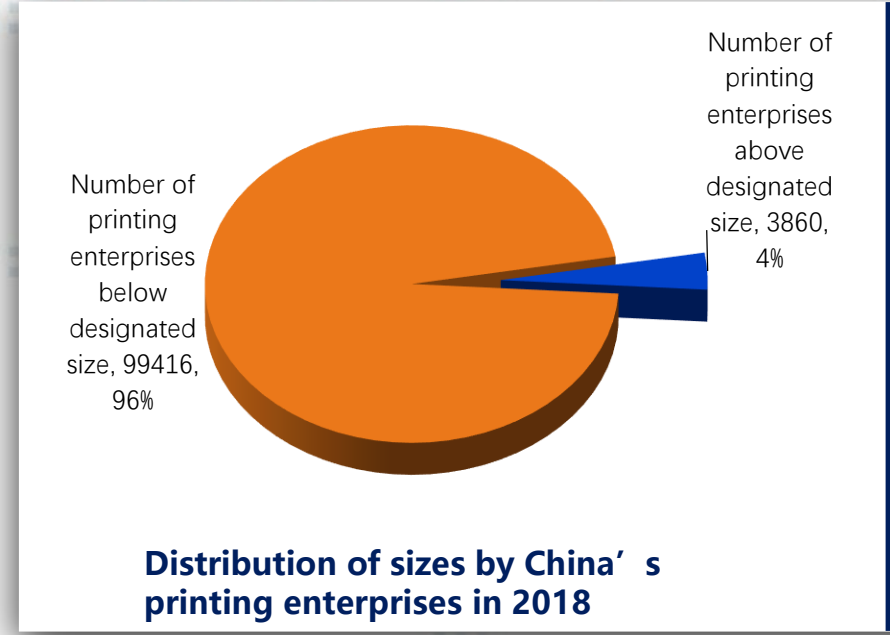
Growth rate slows down

- **First 10 years of this century**: Rapid growth with **double-digit** growth
- **Recent 10 years**: Gradually slowed down, only **4.14%** for last 4 years

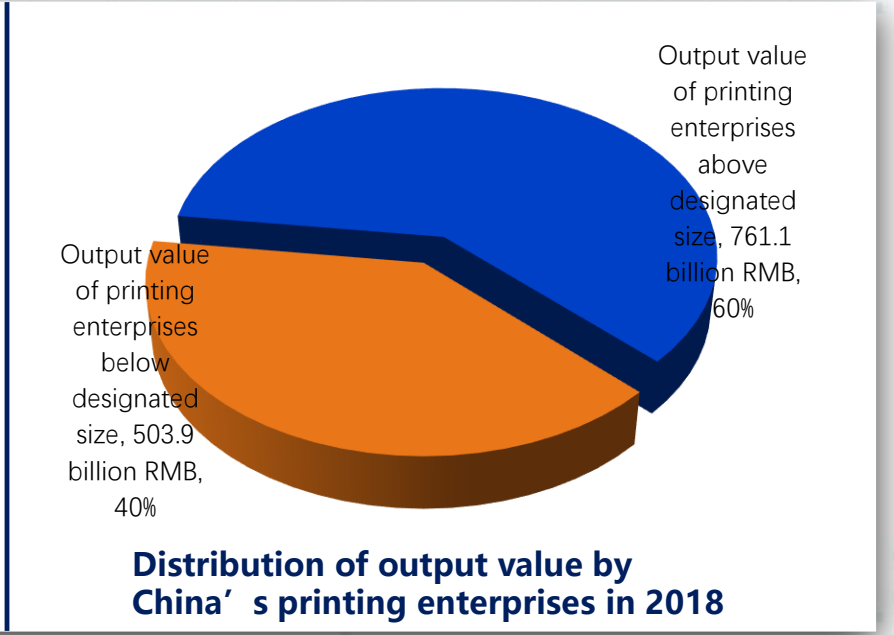


Intensiveness needs improving

- There are many small and medium-sized enterprises in the printing industry in China, and intensification is not high.



Distribution of sizes by China’s printing enterprises in 2018



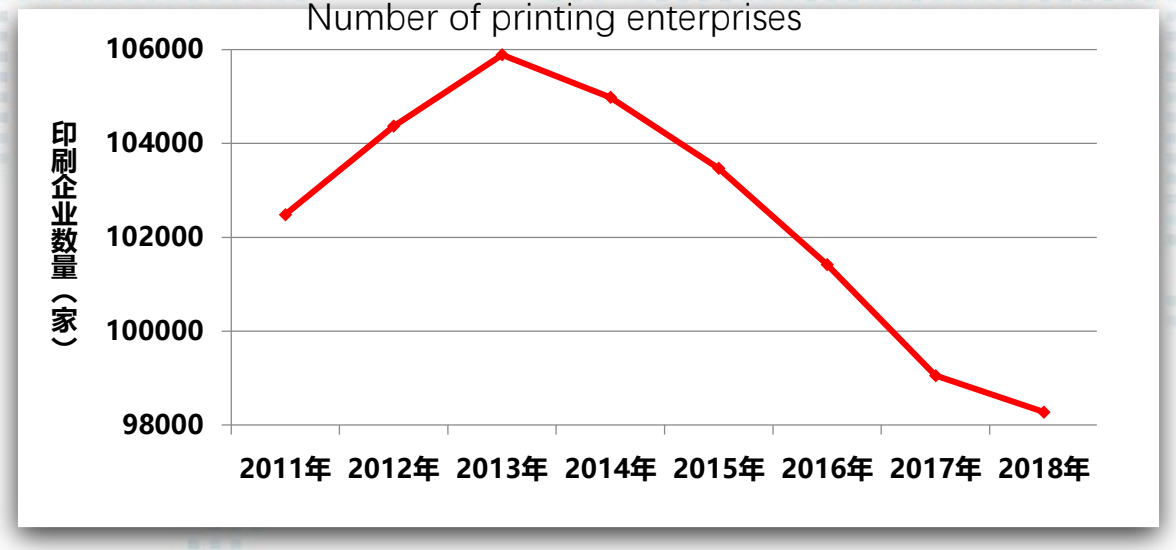
Distribution of output value by China’s printing enterprises in 2018

Intensiveness needs improving

- For the first time ever, individual enterprises have exceeded **10 billion** total output this year. Although compared with the scale of the world's top companies, there is still **a long way to go.**
- There are a number of outstanding printing enterprises with **great growing potential**, such as high quality, fast efficiency, and rapid increasing.

Fierce competition accelerates industry restructuring

- Above **100,000** enterprises → **98,000** enterprises；
- Oversupply, market competition is intensifying, and the industry is facing a reshuffle，especially in **commercial printing** sector.



Labor cost rises

Government pays more attention on employees' salaries, benefits, and social guarantee systems

Improved laws and regulations

Recruitment becomes standardized and scrutinized

Labor cost rises.

Responsibility for environment protection increases

- In recent years, the Chinese government has attached great importance to environmental protection and has issued a series of environmental protection policies and systems. All industries responded positively.

Printing Industry

VOCs is the focus of environmental governance

packaging and printing field is the target of top priority

03

Industry Transformation and Exploration

Industry Transformation and Exploration

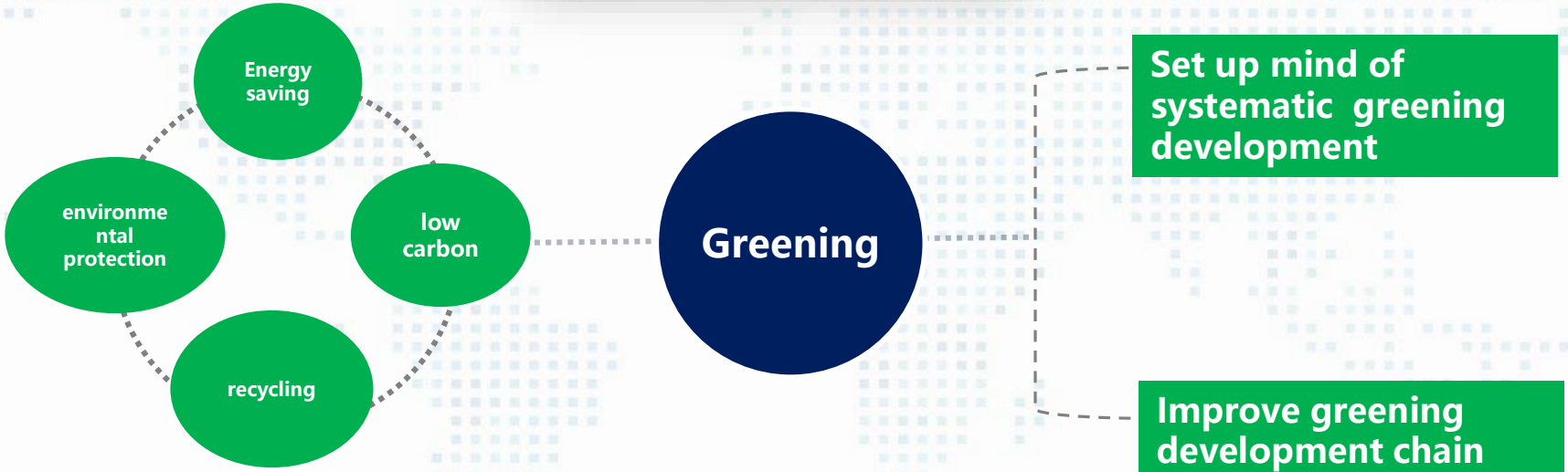
Greening

Guideline of VOCs treatment： Focus on source and process control, with consideration to end treatment.

- More and more printing companies have begun to develop and apply environmentally friendly raw and auxiliary materials and green printing processes, and invests in waste treatment facilities.

Greening

Greening is not only about VOCs



Digitalization

Digital printing

Application: expanding from **fast printing** shops to **traditional printing enterprises**;
Extend to vertical and professional fields further.

01

Publish on demand

- Digital printing **is widely applied**
- Nearly 100 high-speed inkjet production lines have been installed in this segment.

02

commercial printing

- **Photograph printing** increases.
- Digital workshops and vertical e-commerce platforms competes fiercely.

03

Digital packaging

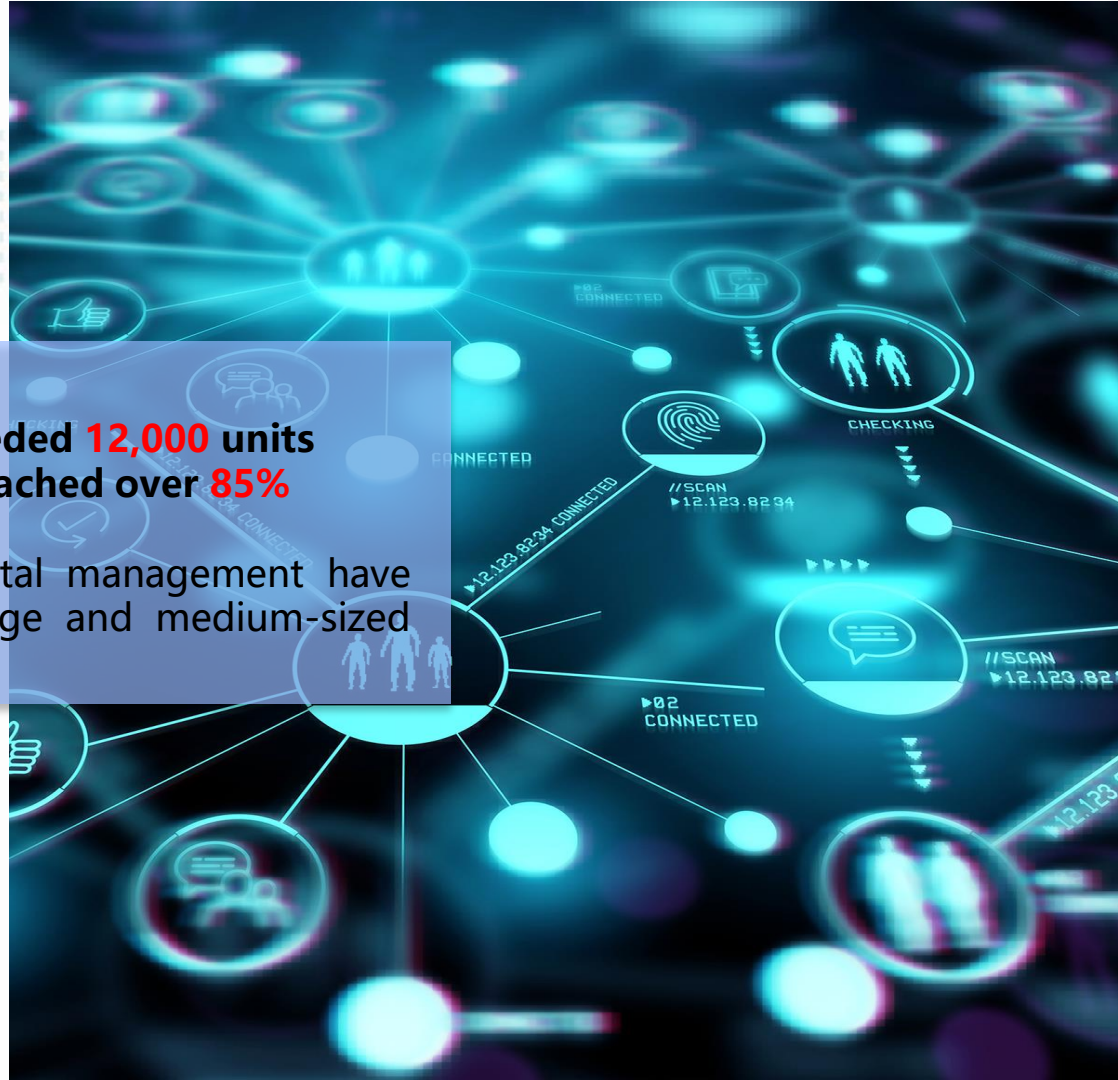
- More and more **popular**
- From prototype to small batch customization
- Pioneers emerges.

Digitalization

printing digitalization

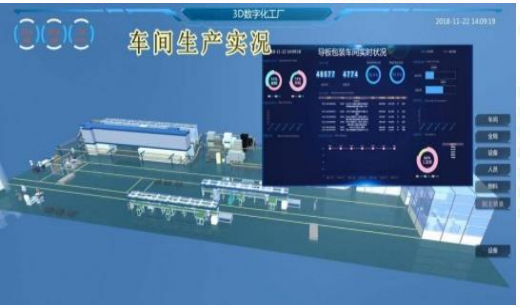
In China,
CTP installation has exceeded 12,000 units
the coverage rate has reached over 85%

digital workflow, CTP and digital management have become the "standard" for large and medium-sized printing enterprises



Intelligence

certain level of automation and digitalization is achieved such as intelligent logistics and warehouse.



Some large and medium-sized printing enterprises have started digitalization work, such as internet construction , ERP, MES, equipment upgrading, which has laid a good foundation for intelligence.

Intelligence development in China’s printing industry just started.

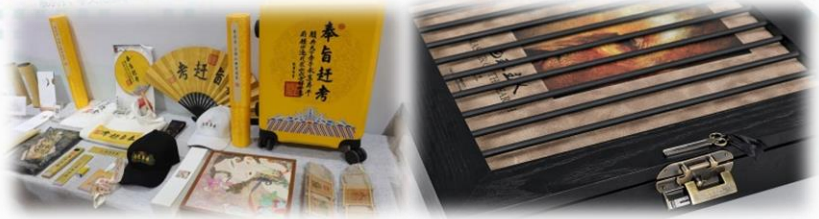
Integration

Internet, IT technology, and digital technology have brought changes to the traditional printing industry

Chinese printing companies are exploring in depth and interpreting new business models, such as smart factories, printing e-commerce, and flexible customized production etc.

Extending integration across industries

Development of printing in the cultural industry;
Value-added services of printing in creative design;
Collaboration of printing in the supply chain



The Printing Technology Association of China

A industry association guiding China’ s printing industry, specialized, non-profit , with many branches and professional committees. Membership includes 2305 enterprises and 705 individuals.

The most well-known Award in China---The Bisheng Printing Technology Award

Secretariat of National Technical Committee of Printing Standardization Administration.
Secretariat of the ISO Printing Technical Committee

Founding member of "the World Print and Communication Forum" and " FAPGA", and has close contact with major international printing associations.

The general election was finished on Dec 20, 2019. The new board members will continuously promote the development of printing industry under government leadership.

The Printing Technology Association of China

Mr. Liu Xiaokai

Director of Printing & Publication Bureau under the Publicity Department of CPC Central Committee
President of the Printing Technology Association of China

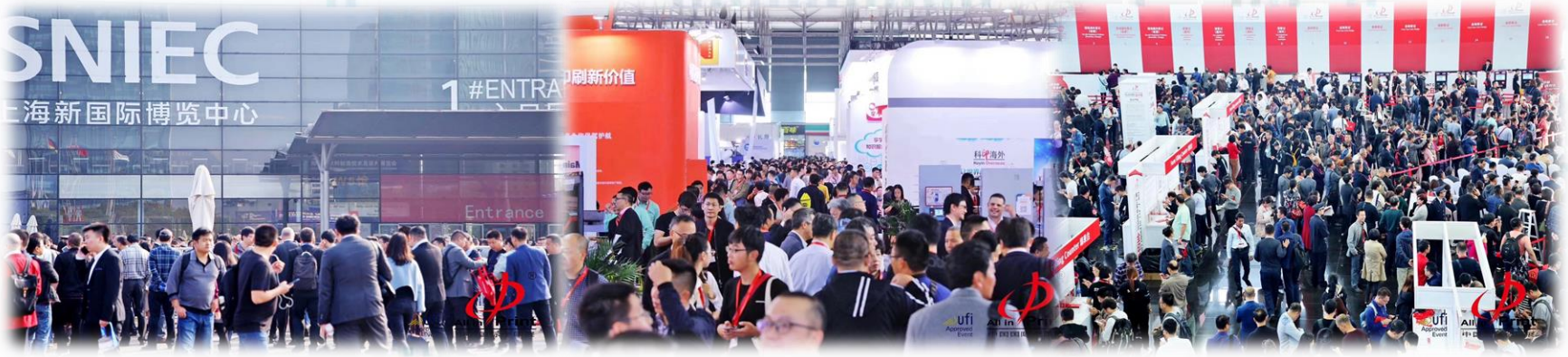
Keyin Media

科印传媒®
Keyin Media

- Vice-chairman unit of The Printing Technology Association of China;
- A comprehensive leading media specialized in printing and packaging industry with high reputation and influence in China;
- A comprehensive, multi-level product and service system supported by paper magazines, training, study tours, and exhibition services.

All in Print China

- Co-organized by The Printing Technology Association of China, China Academy of Printing Technology, Keyin Media, and Messe Düsseldorf Shanghai;
- Since its establishment in 2003, it has successfully held seven sessions;
- The 8th International All in Print China will be held at Shanghai New International Expo Center from October 12th to 16th, 2020. We sincerely invite everyone to visit the exhibition.



新智造
新边界
新动能

New Manufacturing
New Boundary
New Power

THE 8th ALL IN PRINT CHINA

第八届中国国际全印展

中国国际印刷技术及设备器材展

China International Exhibition All about Printing Technology & Equipment

2020.10.12-16

上海新国际博览中心

SNIEC, Shanghai, China

www.allinprint.com

Thank you!