

# Global and China Printing Ink Industry Report, 2012-2015

May 2013

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

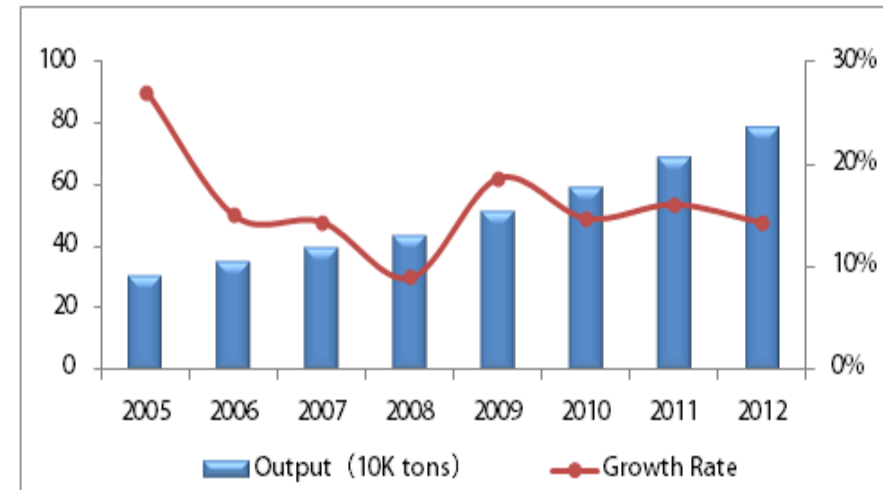
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Driven by the thriving printing industry, recent years have seen upward mobility in global printing ink industry. North America, Japan and Western Europe have kept the position as the world's major printing ink producers and consumers, with the respective consumption in 2012 making up 23%, 19% and 18%. However, Europe and Americas' growing saturated trend in the printing ink market means they are now losing out to Asian regions such as China and India. Presently, many transnational industrial magnates have accelerated their business sprawl in these emerging markets, including DIC, Flint, Toyo Ink, Sataka INX, Siegwark, and Huber which had established branches in China as of late 2012. In 2012, both Sataka INX and DIC announced to build their own new printing ink factories in India.

In recent years, the printing ink industry of China also has seen rapid development. In 2005-2012, its printing ink output witnessed a great surge to 784,700 tons, with the CAGR of 14.59%. Moreover, China printing ink industry has forged three main industrial belts - the Pearl River Delta industrial belt centering on Guangdong, the Yangtze River Delta industrial belt surrounding Shanghai and Zhejiang, and the circum-Bohai-sea industrial belt around Beijing, Tianjin and Liaoning, with the combined output in 2012 standing at 66.76%. Nevertheless, China is yet to become a strong country in the printing ink industry and, foreign brands occupy a lion's share of 70%. There are only a few domestic flagship counterparts, including Guangdong Sky Dragon Printing Ink Group, Letong Chemical Co., Ltd, Suzhou Kingswood Printing Ink, etc.

**China Printing Ink Output, 2005-2012**



Source: NBS; ResearchInChina Global and China Printing Ink Industry Report, 2012-2015

Due to the stagnant economic development worldwide, China printing ink industry has slowed down its advance. However, given the status quo and downstream demand market, the CAGR of output in China printing ink industry is expected to realize around 14% in 2013-2015. And offset printing ink is projected to see the highest demand in China in upcoming three years, despite overall mild development, while package printing ink will still see the greatest growth potential, in particular when it comes to the development of gravure ink. Meanwhile, with lifting environmental protection standard targeting the printing ink industry, the demand for environmental-friendly printing ink, for example flexo printing ink, is growing.

## **The report highlights:**

Status Quo, Competition Pattern and Development Outlook of Global Printing Ink Industry;

Status Quo, Demand & Supply, Import & Export, Influence of Upstream and Downstream Industries and Prediction of China Printing Ink Industry;

Operation, Printing Ink Business and Business in China of 6 Global Printing Ink Enterprises Including DIC and Flink;

Operation, Printing Ink Business and Prediction of 8 Chinese Industrial Players Including Guangdong Sky Dragon Printing Ink Group, Suzhou Kingswood Printing Ink and Letong Chemical Co., Ltd.

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