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# **Global Review of the Printing Industry: 1998 – 2008**

**March 2005**

**Hambalt**

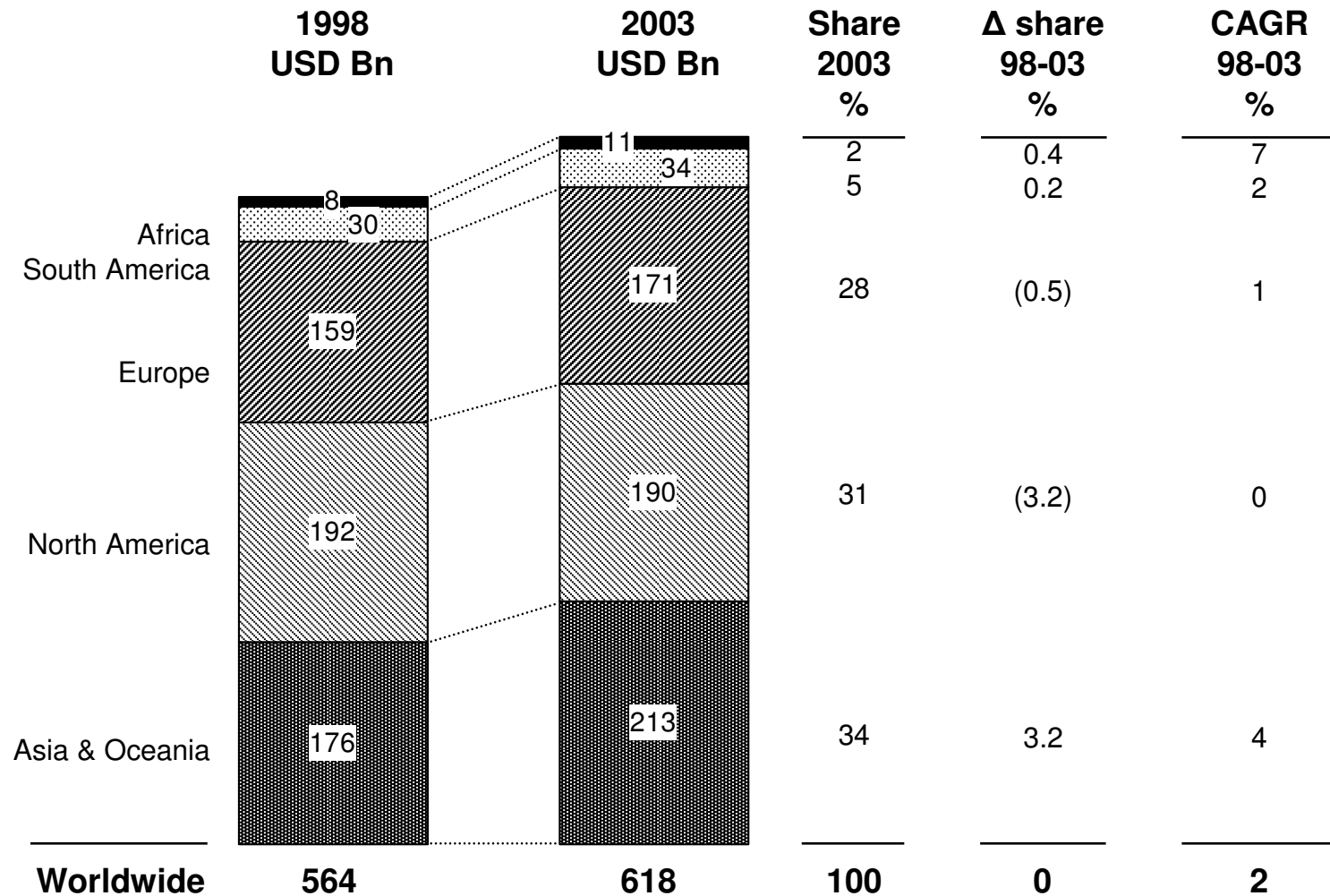
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## Introduction

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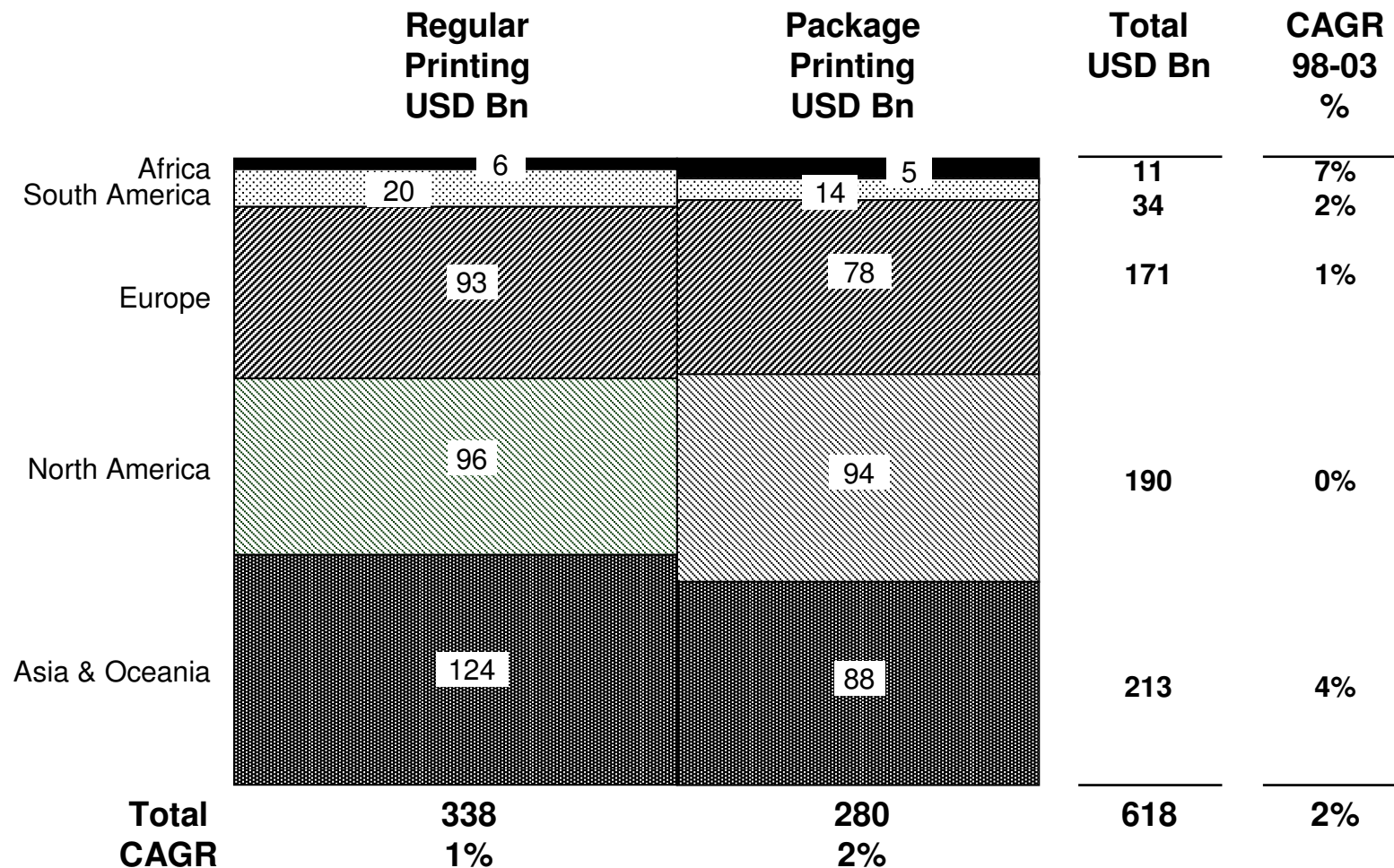
- Hambalt Associates, in conjunction with ProGress Business Consultants of Cairo, were engaged by The Industrial Modernisation Centre in 2004 to conduct an assessment of the current state of the printing industry in Egypt.
- Part of this study involved carrying out a global review of the printing industry. The key findings of the study are summarised in the following slides and include:
  - Global market size 1998-2003:
    - By region
    - Regular printing vs. package printing
  - Consumption of printed matter per capita vs. industry growth by region
  - Projected global market size 2003-2008:
    - By region
    - Regular printing vs. package printing

# Global Total Printing Industry by Region, 1998-2003, USD Bn



**In 2003 the global total printing industry was worth USD618bn...**

## Global Total Printing Industry by Region, 2003, USD Bn



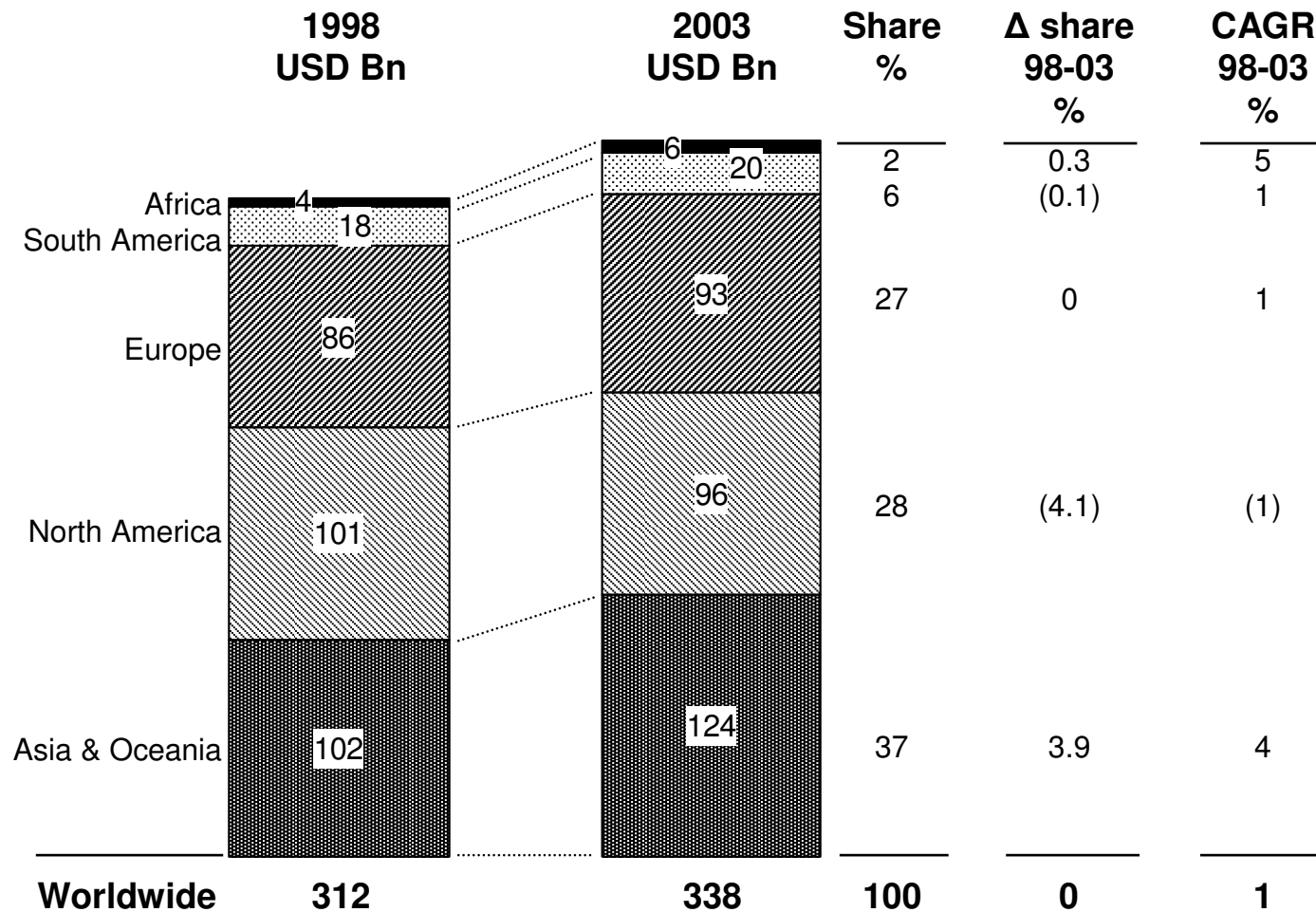
**... of this total figure USD338bn was regular\* and 280bn was package printing**

\* "Regular printing" denotes all printing other than package printing and includes commercial, newspapers & magazines, and book categories

Sources: PIRA International; Pulp & Paper International; Hambalt Associates Analysis

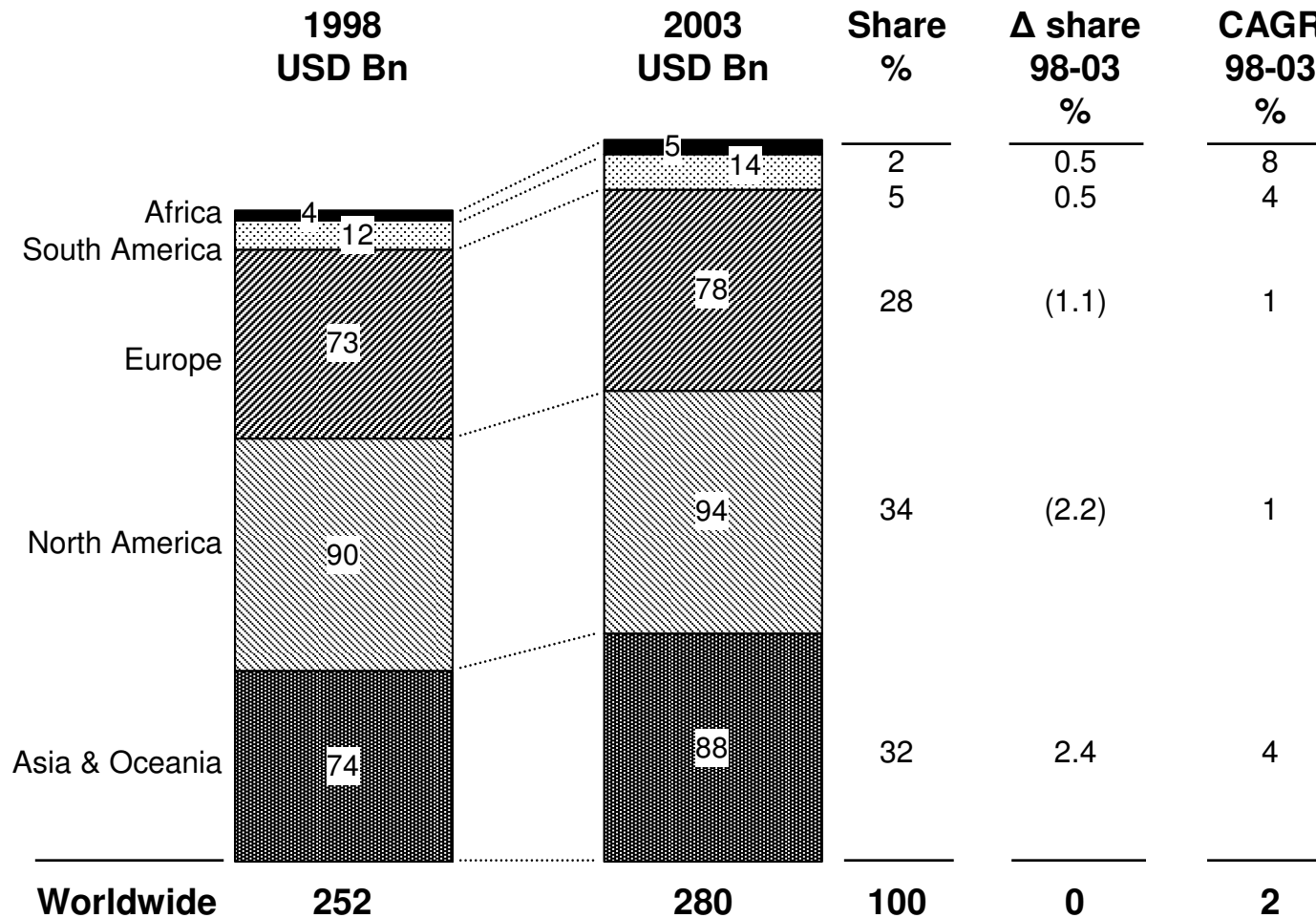
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## Regular Printing Industry by Region, 1998-2003, USD Bn



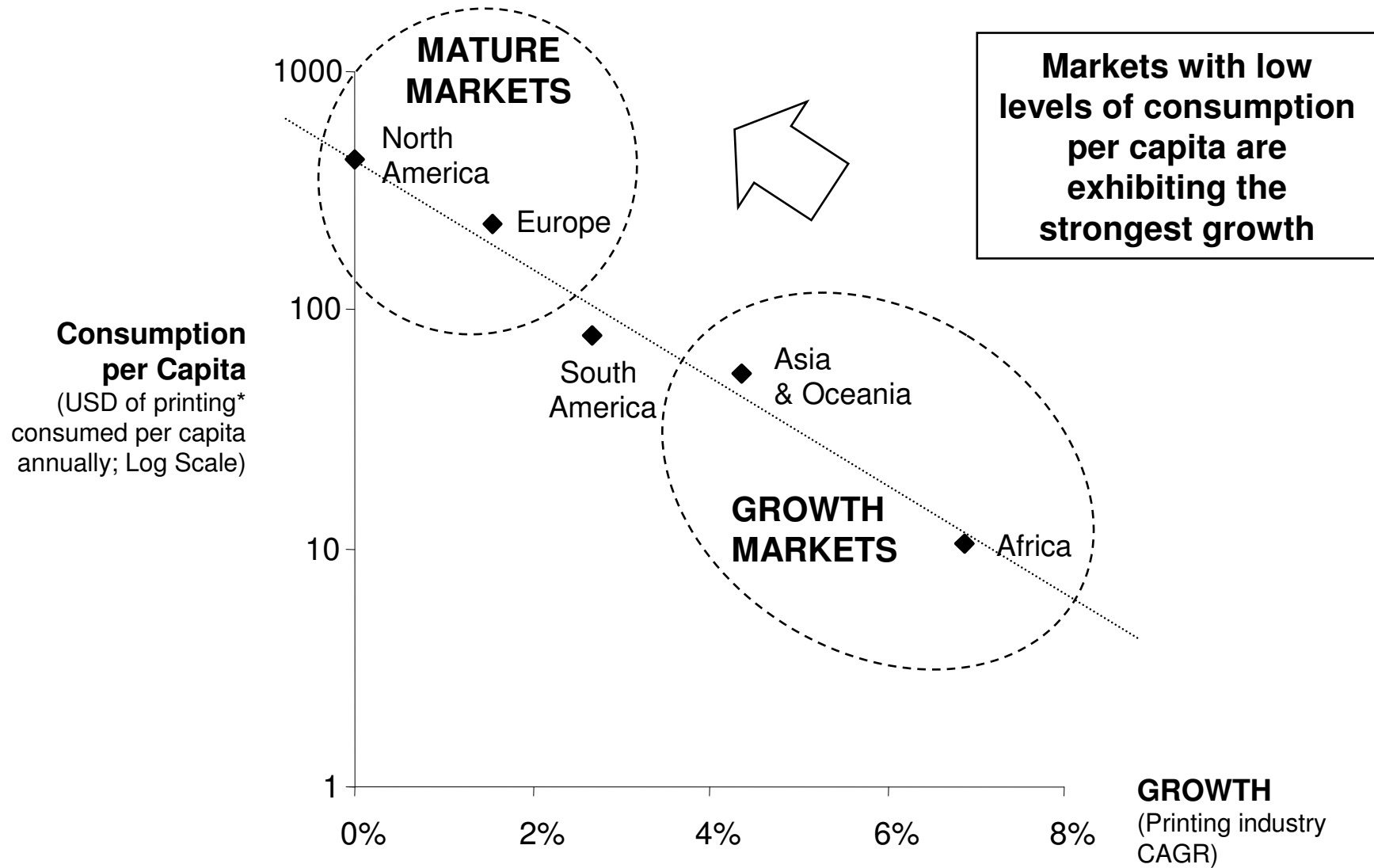
**Growth in the global regular printing industry is coming from Asia & Oceania and Africa...**

## Package Printing Industry by Region, 1998-2003, USD Bn



**...these regions, and South America, also provide the growth in package printing**

# Consumption per Capita against Growth



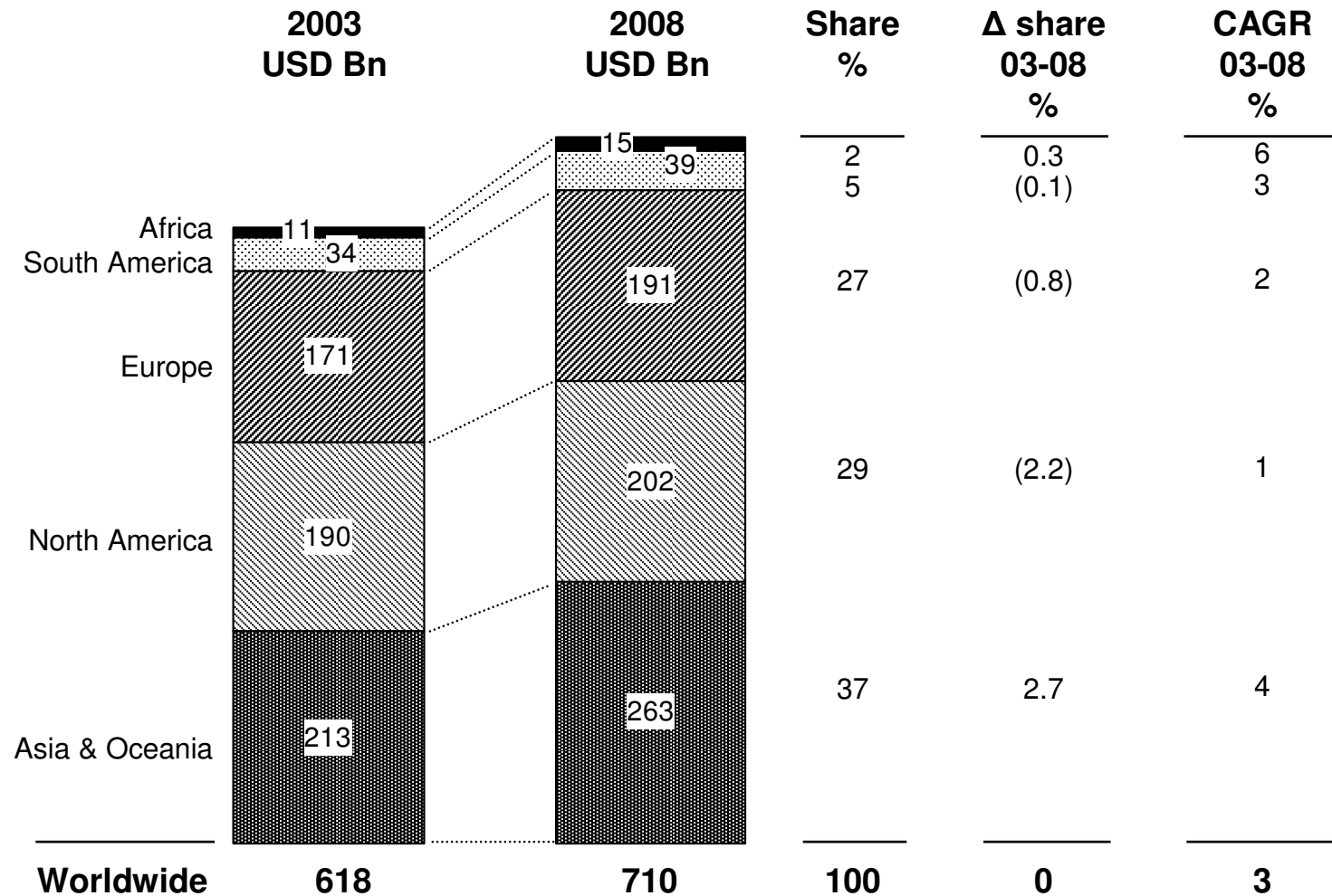
\*Including package printing

NB: This chart illustrates broad trends by region. There are obvious exceptions within each region. For example, Japan has high consumption per capita and low growth, whereas many East European countries have low consumption per capita and high growth

Sources: PIRA International; Pulp & Paper International; Hambalt Associates Analysis

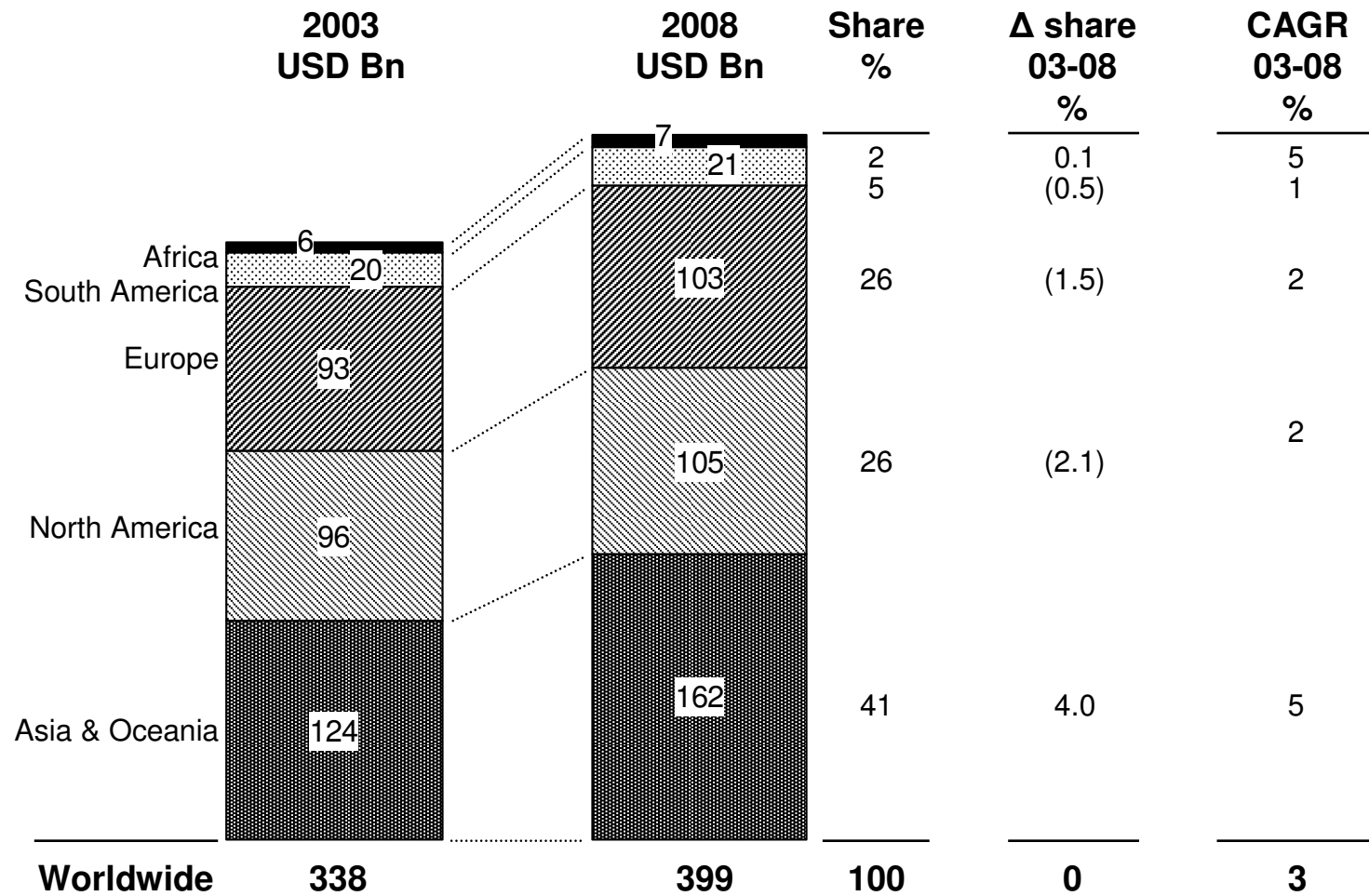
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## Projected Total Printing Industry by Region, 2003-2008, USD Bn

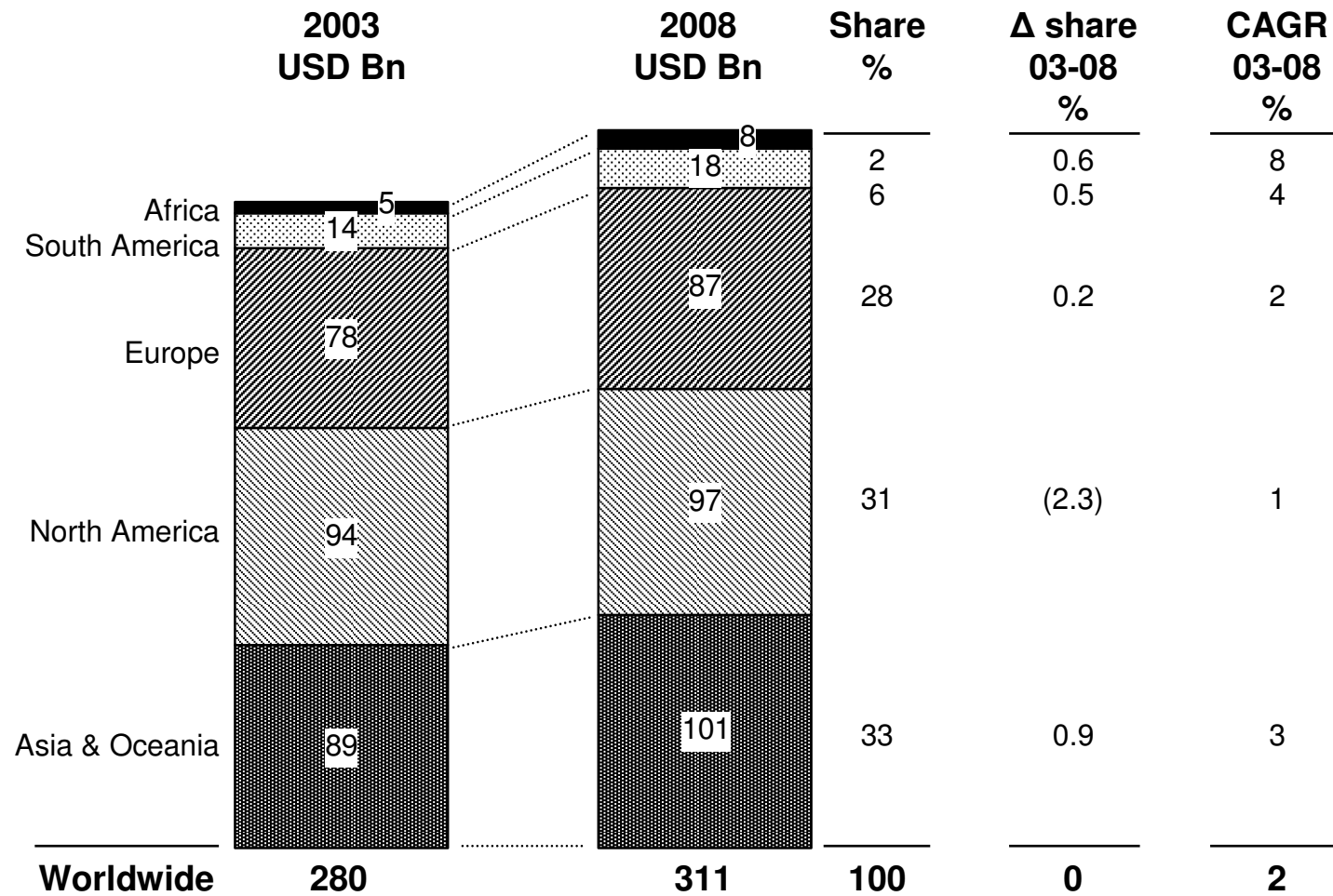


**These regions are projected to continue to drive the growth of global printing industry**

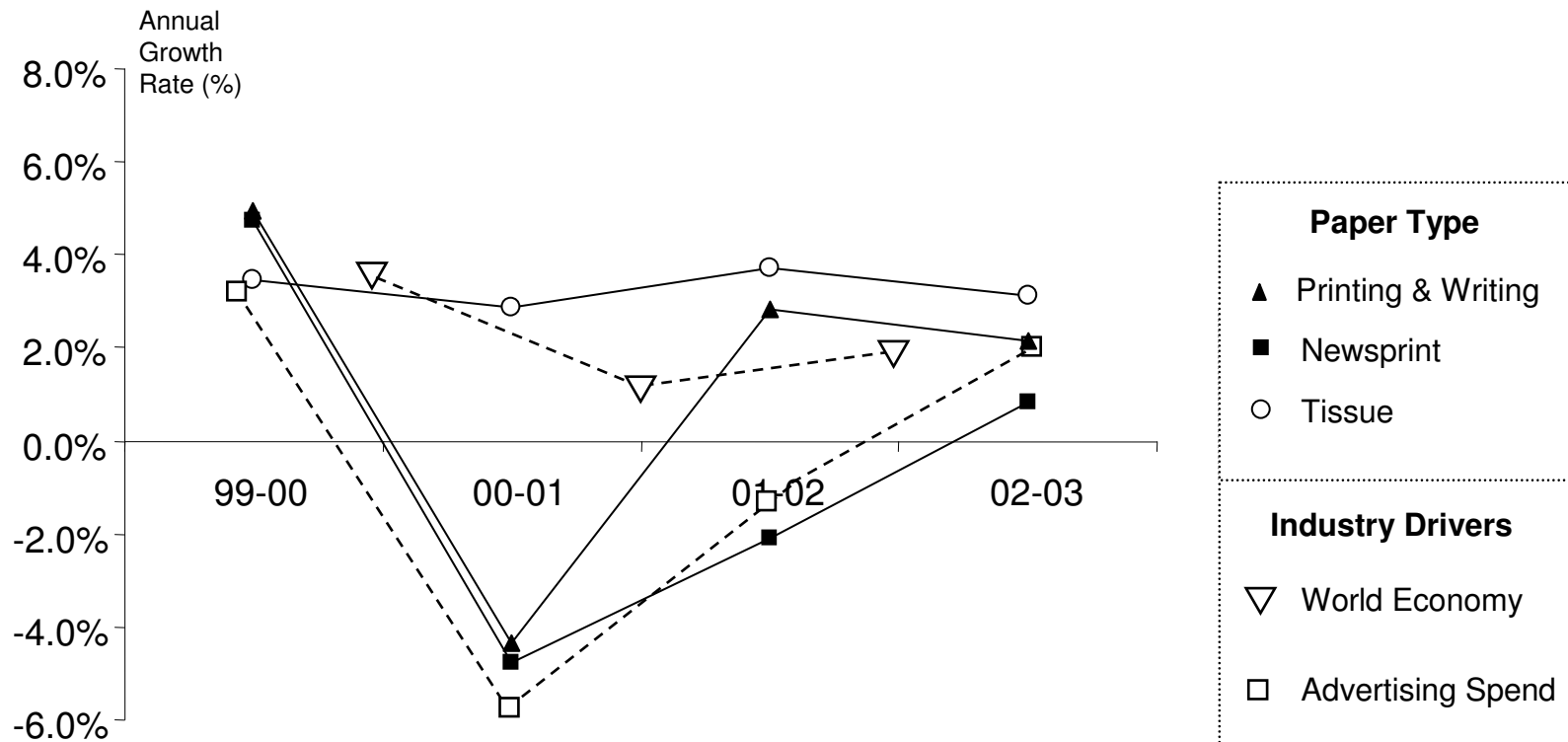
# Projected Regular Printing Industry by Region, 2003-2008, USD Bn



# Projected Package Printing Market by Region, 2003-2008, USD Bn



## Paper Consumption vs. Advertising vs. Economy, Growth Rate (%), 1999-2003



**The published printing industry is strongly linked to the health of the advertising industry, and acts as a bellwether for the economy as a whole**

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Hambalt Associates is a strategy consulting firm with extensive experience in providing private sector companies across Europe with consulting services:

### Hambalt Associates' Consulting Services

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- Business plan to raise finance
- Options appraisal (NPV, ROI, DCF)
- Value chain analysis
- Cost reduction
- Productivity improvement
- Business transformation
- Supply chain management
- Product line rationalisation
- Revenue growth
- Pricing strategy
- Benchmarking and best practice
- Financial modelling
- Cost-benefit analysis
- Strategy development

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