

Redefinition of the digital printer.

INSIGHT REPORT
EXECUTIVE SUMMARY

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Canon

Report Background

In 2008 at DRUPA, Canon launched their seminal Insight report, in conjunction with Professor Frank Romano. This report looked at meaningful trends that, intelligently interpreted, could help customers make informed and better decisions to improve future performance.

As we emerge from a global recession, our industry continues to undergo huge change, influenced by external market forces, social trends and changes in technology. To help support our customers into Ipex 2010 and beyond, Canon have completed some further and extensive interview based research, once more under the independent guidance of Professor Frank Romano.

This Executive Summary provides a quick snapshot of the findings.
For a copy of the full report contact your local Canon representative.

Key findings

- Digital printing looked set to lead the market by 2020, suiting the trend to shortruns and print-on-demand
- Small print businesses would benefit from advances in workflow and web-to print technologies
- Easy-to-operate machinery, IT infrastructure and hybrid workflow would revolutionise print
- Continued efficiency gains would not be enough to guarantee profitability.

Methodology

Professor Romano's team has interviewed a total of 840 printers and industry commentators – the largest sample to date - with 65.5% based in Western Europe. This not only gives us a meaningful temperature reading of our industry as we emerge from recession, but also provides helpful pointers towards the longer term concerns and aspirations of those businesses looking to set a prosperous route forwards.

There were 840 completed interviews. The majority (65.5 percent) were in Western Europe, but there were a sufficient number in other geographic areas to compare activity. Of the 2008 companies interviewed, 11.2 percent merged with other printers, 6.3 percent went out of business completely, and 20.7 percent acquired digital printing. Of all interviews, 15.1 percent were start-ups and most had only digital printing.

Digital Printing Update: Trends & Opportunities

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Take a quick look at the key areas covered in the report by simply clicking on the box of your choice.

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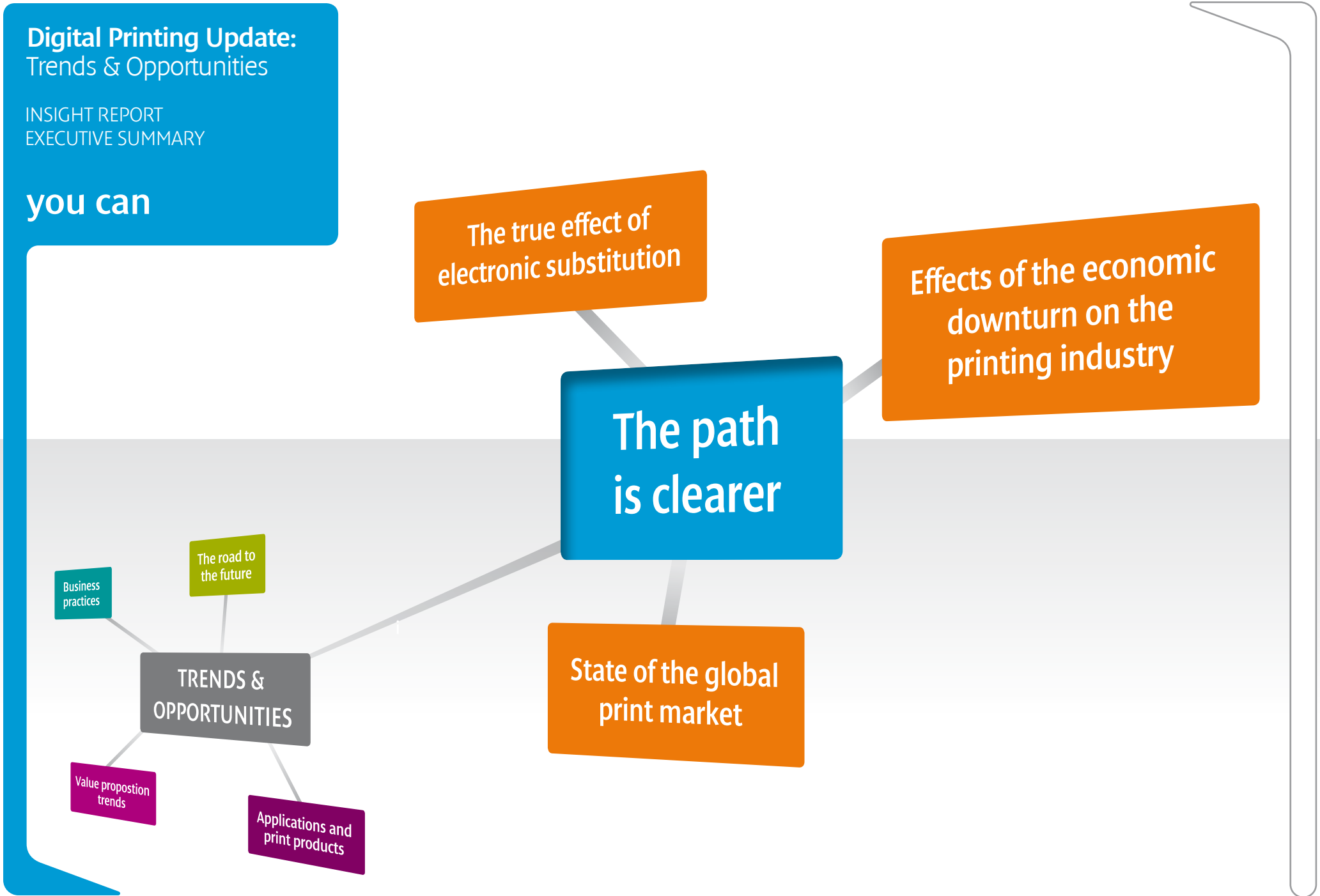
Applications and
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The true effect of
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Effects of the economic
downturn on the
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State of the global
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Effects of the economic downturn on the printing industry

The report shows the impacts on print volumes and the upturn in digital printing.

The true effect of electronic substitution

Effects of the economic downturn on the printing industry

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State of the global print market

The report outlines
the variable trends
across different
geographic regions.

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The true effect of electronic substitution

The report shows revenue and profit impacts of printers with and without digital printing.

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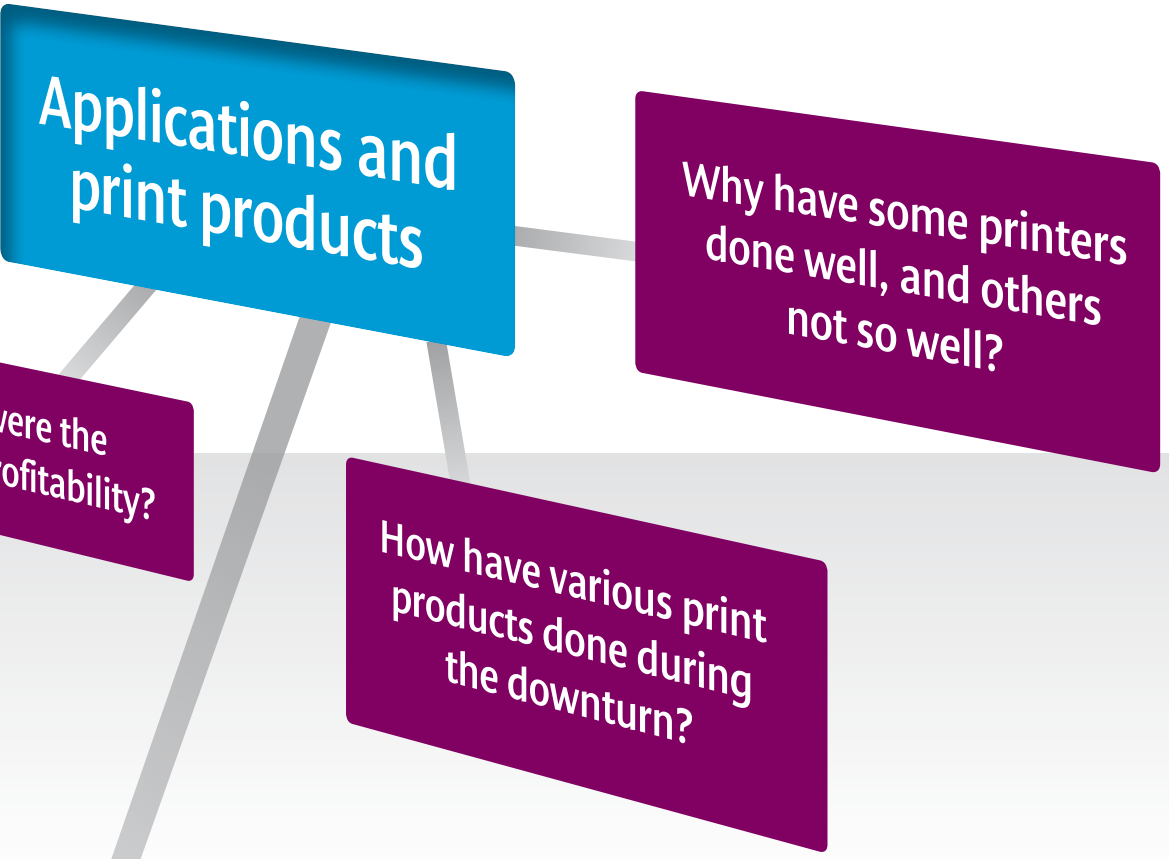


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Why have some printers done well, and others not so well?

The report outlines the characteristics of successful business leaders and successful business strategies.

Applications and print products

Why have some printers done well, and others not so well?

Where were the drivers of profitability?

How have various print products done during the downturn?



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How have various print products done during the downturn?

The report details volume growth per print product, per market and predicts future potential.

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Where were the drivers of profitability?

The report analyses the impact of value added services and the areas of perceived impact into 2010.

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Trends in print demand

Business development trends

Value proposition trends

Digital printing trends



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Trends in print demand

The report looks at the print buying trends in 2009.

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SERVICE
TECHNOLOGY + INNOVATION
CUSTOMER RELATIONSHIP
HERITAGE + EXPERTISE



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Digital printing trends

The report analyses the changes in colour vs. monochrome trends as well as volume and size of runs.

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Business development trends

The report shows key factors affecting print businesses and trends in digital printer acquisition.

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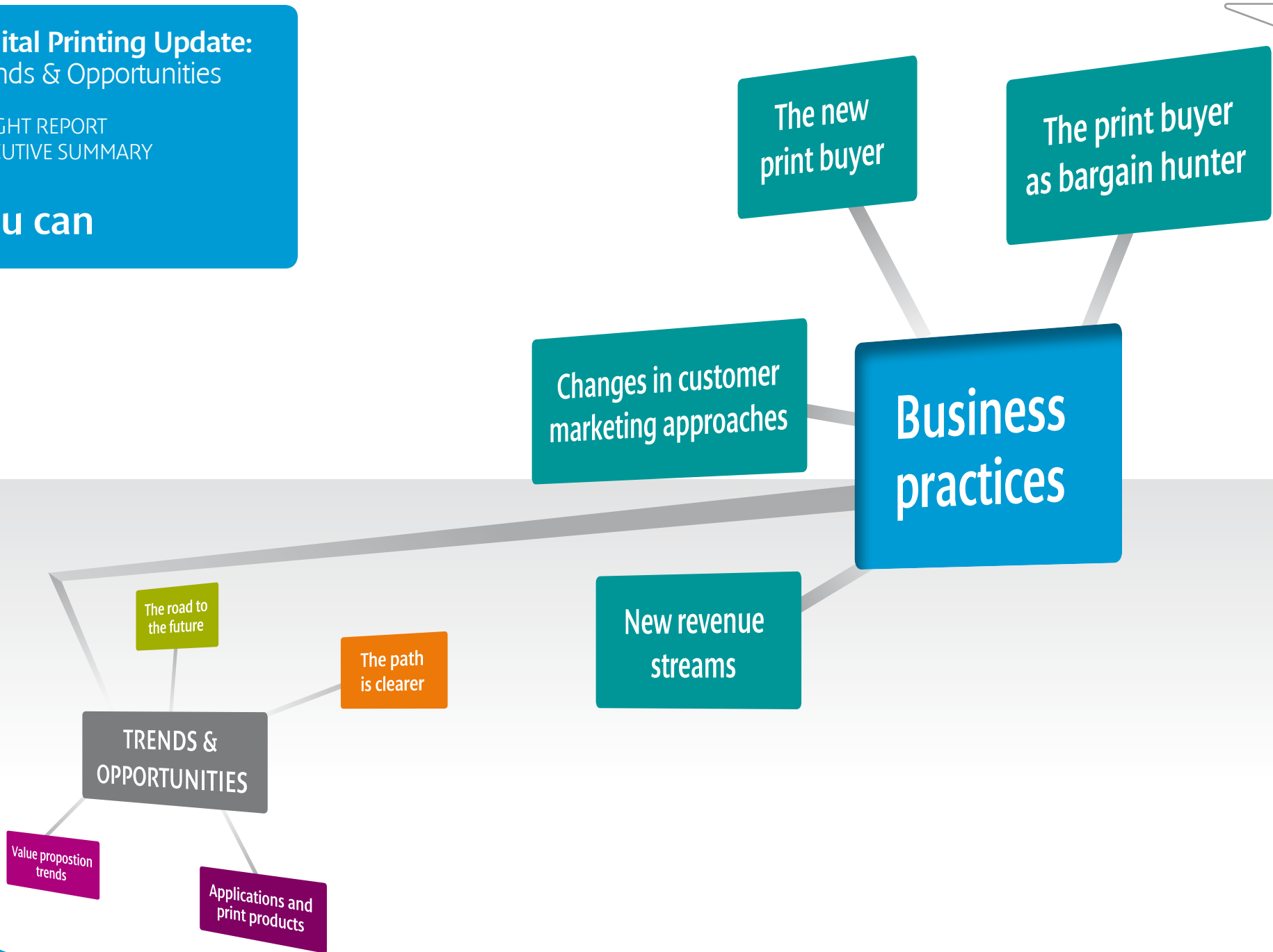
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The new print buyer

The report provides an insight into the new job requirements of a print buyer.



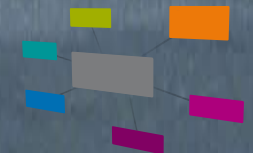
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The print buyer as bargain hunter

The report explains the cost benefits of E-procurement.



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Changes in customer marketing approaches

The report looks at the emerging alternatives to print for targeting customers.

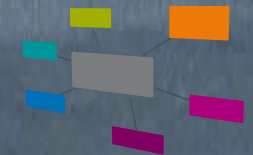
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New revenue
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New revenue streams

The report outlines the changes in customer demand and products affected by electronic substitution.

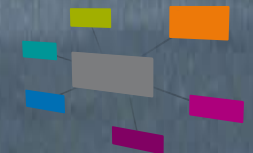
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A strategic plan for action

The report provides an assessment of the various strategic approaches for 2010.

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