Geographic scope

The 26 countries selected and analyzed span across all global regions, representing 80% of global GDP and 70% of the world's population.

2017

- Publishing: 20%
- Packaging: 64%
- Marketing & commercial: 16%

$389bn

CAGR 2.7% (US dollar terms)*

2020

- Publishing: 17%
- Packaging: 68%
- Marketing & commercial: 15%

$421bn

Average growth 2.8% (local currency terms)

Note: The three printing segments we cover in WWMP 2.0 do not represent the entire printing market.

* Calculation based on EIU forecasts for average yearly exchange rates.
Print Packaging Market – A Bright Spot

Total print packaging size and growth, 2011-20
in US$

Note: Total growth corresponds to average growth in local currency terms of all 26 countries in this study.
Source: EIU.
What is driving the Packaging Industry?

- Emerging Markets
- Retailer Impacts
- Design Thinking
- Sustainability
- Science & Technology
- Consumers/Social Media
- Laws & Regulations
Emerging regions generally have high growth but smaller print packaging markets. Asia-Pacific is the exception, having the happy confluence of both large and fast-growing markets.

<table>
<thead>
<tr>
<th>Region</th>
<th>Size of regional print packaging market in 2020 (US$ bn)</th>
<th>Total print packaging market, average growth (2016-20)</th>
</tr>
</thead>
<tbody>
<tr>
<td>North America</td>
<td>90.1</td>
<td>&gt; 8%</td>
</tr>
<tr>
<td>Latin America</td>
<td>7.4</td>
<td>6%-8%</td>
</tr>
<tr>
<td>Western Europe</td>
<td>52.3</td>
<td>4%-6%</td>
</tr>
<tr>
<td>Central &amp; Eastern Europe</td>
<td>3.1</td>
<td>2%-4%</td>
</tr>
<tr>
<td>Middle East</td>
<td>1.3</td>
<td>&lt; 2%</td>
</tr>
<tr>
<td>Middle East</td>
<td>1.0</td>
<td>&lt; 2%</td>
</tr>
<tr>
<td>Africa</td>
<td>1.0</td>
<td>&lt; 2%</td>
</tr>
<tr>
<td>Asia-Pacific</td>
<td>130.3</td>
<td>&gt; 8%</td>
</tr>
</tbody>
</table>
Asia-Pacific

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.

Asia-Pacific growth by country

<table>
<thead>
<tr>
<th>Country</th>
<th>2011-15</th>
<th>2016-20</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>12.1%</td>
<td>12.4%</td>
</tr>
<tr>
<td>Indo.</td>
<td>9.5%</td>
<td>10.2%</td>
</tr>
<tr>
<td>Viet.</td>
<td>9.6%</td>
<td>10.1%</td>
</tr>
<tr>
<td>Phil.</td>
<td>7.5%</td>
<td>6.9%</td>
</tr>
<tr>
<td>APAC</td>
<td>6.9%</td>
<td>6.7%</td>
</tr>
<tr>
<td>China</td>
<td>7.9%</td>
<td>5.9%</td>
</tr>
<tr>
<td>S. Kor.</td>
<td>4.5%</td>
<td>3.8%</td>
</tr>
<tr>
<td>Aus.</td>
<td>3.3%</td>
<td>3.5%</td>
</tr>
</tbody>
</table>

Note: Figures presented are cumulative annual growth rates for each country in local currency terms. Region growth is the average cumulative annual growth rates of the countries in the region. Source: EIU.
Snapshot: Food Packaging Trends in Asia Pacific

- **Dairy Products** on China will lead the growth in **Brick Liquid Cartons**, with slim 250ml cartons gaining popularity.

- **Savory Snacks** and **Confectionary** drive growth in **flexible plastic** with **small, affordable pack sizes** being popular with low-income consumers.

- **Shaped Liquid Cartons** to see highest CAGR, driven by growth in plain yoghurts.

THAILAND: Volume Share of Food Packaging

Volume Share of Food Packaging in Thailand

- Flexible Paper/Plastic: 4%
- Flexible Plastic: 34%
- Brick Liquid Cartons: 28%
- Metal Food Cans: 7%
- Other Plastic Bottles: 4%
- Other: 22%

2021 Volume Share

2021: 25.7bn Forecast Units of Packaged Food Products Sold

Snapshot: Beverage Packaging Trends in Asia Pacific

- **Increased Disposable Income** create growth in bottled water, energy drinks, and carbonates, supporting **PET bottles**

- Growing coffee consumption to drive flexible **aluminum/plastic packaging**

- **Metal Bottles** to grow steadily in beer markets. China will see a growth due to premium brands promoting limited edition bottles

THAILAND: Volume Share of Beverage Packaging

Volume Share of Beverage Packaging

- Glass Bottles: 36%
- Metal Beverage Cans: 2%
- PET Bottles: 17%
- Brick Liquid Cartons: 7%
- Flexible Aluminium/Plastic: 3%
- Other: 2%

2021: 24.2bn Forecast Units of Beverage Product Sold

THAILAND: Food/Beverage Packaging Equipment Import

![Graph showing import market share by country from 2012 to 2017]

**Source:** Global Packaging Trends - Global Growth Markets for Packaging 2017 Report (2015-2020), PMMI with data from Euromonitor
Publishing printing and marketing & commercial printing markets
Only some countries in Asia-Pacific will experience solid, positive growth in publishing printing. Most countries in our study will contract.
North American and Western European markets are declining, but Asia-Pacific is growing at a healthy pace.
## What is Driving the Commercial and Publishing Markets

Macroeconomic and demographic trends underpin the outlook for publishing printing markets and marketing & commercial printing markets in all countries.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Access to telecommunication technology</strong></td>
<td>Access to the internet continues to increase rapidly in emerging markets. The next step is to get people connected to high-speed mobile internet.</td>
</tr>
<tr>
<td><strong>Rising education levels and literacy rates</strong></td>
<td>All readers are potential print consumers. As the number of readers increases thanks to improved education levels and literacy rates, consumption of the printed word will grow.</td>
</tr>
<tr>
<td><strong>Higher incomes</strong></td>
<td>The rise of middle-income consumers in emerging markets will boost printing revenues. Consumer expenditures will increase overall, especially in education and leisure, which supports publishing printing.</td>
</tr>
<tr>
<td><strong>Urbanization</strong></td>
<td>Urbanization translates to higher concentrations of people, which makes marketing efforts more efficient.</td>
</tr>
<tr>
<td><strong>Generational gap</strong></td>
<td>Younger generations tend to consume more books and magazines, while older generations consume more newspapers. But this is changing.</td>
</tr>
</tbody>
</table>
Asia-Pacific

Asia-Pacific is expected to outperform all other regions in terms of both the publishing printing industry and the marketing & commercial printing industry.

**Asia-Pacific’s publishing printing market by segment in 2012-21 (US$)**

- Books
- Magazines
- Newspapers
- Asia-Pacific growth (%)
- Total growth (%)

Note: Asia-Pacific includes Australia, China, India, Indonesia, Japan, Philippines, South Korea, and Vietnam; Regional growth is the average LCU growth rate of all countries in the region; Total growth is the average LCU growth rate of all 26 countries in this study.

Source: The Economist Intelligence Unit.

**Asia-Pacific’s marketing & commercial printing market by segment in 2012-21 (US$)**

- Brochures & pamphlets
- Catalogs
- Direct mail
- Directories
- Asia-Pacific growth (%)
- Total growth (%)

Note: Asia-Pacific includes Australia, China, India, Indonesia, Japan, Philippines, South Korea, and Vietnam; Regional growth is the average LCU growth rate of all countries in the region; Total growth is the average LCU growth rate of all 26 countries in this study.

Source: The Economist Intelligence Unit.
Thank You and Let’s Go!

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