

# The 2023-2028 Outlook for Printing and Related Support Activities in China

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## Abstracts

This study covers the latent demand outlook for printing and related support activities across the regions of China, including provinces, autonomous regions (Guangxi, Nei Mongol, Ningxia, Xinjiang, Xizang - Tibet), municipalities (Beijing, Chongqing, Shanghai, and Tianjin), special administrative regions (Hong Kong and Macau), and Taiwan (all hereafter referred to as 'regions'). Latent demand (in millions of U.S. dollars), or potential industry earnings (P.I.E.) estimates are given across some 1,100 cities in China. For each major city in question, the percent share the city is of the region and of China is reported. Each major city is defined as an area of 'economic population', as opposed to the demographic population within a legal geographic boundary. For many cities, the economic population is much larger than the population within the city limits; this is especially true for the cities of the Western regions. For the coastal regions, cities which are close to other major cities or which represent, by themselves, a high percent of the regional population, actual city-level population is closer to the economic population (e.g. in Beijing). Based on this 'economic' definition of population, comparative benchmarks allow the reader to quickly gauge a city's marketing and distribution value vis-?-vis others. This exercise is quite useful for persons setting up distribution centers or sales force strategies. Using econometric models which project fundamental economic dynamics within each region and city of influence, latent demand estimates are created for printing and related support activities. This report does not discuss the specific players in the market serving the latent demand, nor specific details at the product level. The study also does not consider short-term cyclicalities that might affect realized sales. The study, therefore, is strategic in nature, taking an aggregate and long-run view, irrespective of the players or products involved.

This study covers printing and related support activities as defined by the North American Industrial Classification system or NAICS (pronounced 'nakes').

The NAICS code for printing and related support activities is 3231. It is for this definition that aggregate latent demand estimates are derived. Printing and related support activities is specifically defined as follows:

### 3231 Printing and Related Support Activities

32311 This industry comprises establishments primarily engaged in printing on apparel and textile products, paper, metal, glass, plastics, and other materials, except fabric (grey goods). The printing processes employed include, but are not limited to, lithographic, gravure, screen, flexographic, digital, and letterpress. Establishments in this industry do not manufacture the stock that they print but may perform postprinting activities, such as folding, cutting, or laminating the materials they print, and mailing.

32312 This industry comprises establishments primarily engaged in performing prepress (e.g., platemaking, typesetting) and postpress services (e.g., book binding) in support of printing activities.

323110 This U.S. industry comprises establishments primarily engaged in lithographic (i.e., offset) printing without publishing (except books, grey goods, and manifold business forms). This industry includes establishments engaged in lithographic printing on purchased stock materials, such as stationery, letterhead, invitations, labels, and similar items, on a job order basis.

323111 This U.S. industry comprises establishments primarily engaged in gravure printing without publishing (except books, grey goods, and manifold business forms). This industry includes establishments engaged in gravure printing on purchased stock materials, such as stationery, letterhead, invitations, labels, and similar items, on a job order basis.

323112 This U.S. industry comprises establishments primarily engaged in flexographic printing without publishing (except books, grey goods, and manifold business forms). This industry includes establishments engaged in flexographic printing on purchased stock materials, such as stationery, invitations, labels, and similar items, on a job order basis.

323113 This U.S. industry comprises establishments primarily engaged in screen printing without publishing (except books, grey goods, and manifold business forms). This industry includes establishments engaged in screen printing on purchased stock

materials, such as stationery, invitations, labels, and similar items, on a job order basis. Establishments primarily engaged in printing on apparel and textile products, such as T-shirts, caps, jackets, towels, and napkins, are included in this industry.

323114 This U.S. industry comprises establishments primarily engaged in traditional printing activities, such as short-run offset printing or prepress services, in combination with providing document photocopying service. Prepress services include receiving documents in electronic format and directly duplicating from the electronic file and formatting, colorizing, and otherwise modifying the original document to improve presentation. These establishments, known as quick printers, generally provide short-run printing and copying with fast turnaround times.

323115 This U.S. industry comprises establishments primarily engaged in printing graphical materials using digital printing equipment. Establishments known as digital printers typically provide sophisticated prepress services including using scanners to input images and computers to manipulate and format the graphic images prior to printing.

323116 This U.S. industry comprises establishments primarily engaged in printing special forms, including checkbooks, for use in the operation of a business. The forms may be in single and multiple sets, including carbonized, interleaved with carbon, or otherwise processed for multiple reproduction.

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