

The Country Paper on Indian Printing Industry

The printing industry has been recognized by almost all the countries as one of the most important industries for social, economic and cultural development.

The Indian Print Industry has undergone a revolutionary change in the last 15 years. When the economic reforms were introduced in 1991, along with other industries printing industry also took the advantage of upgradation, modernisation and fast developments. Likewise the other nations in South Asia also grown up and all these nations including India had started capturing the markets of Europe and Gulf countries in their needs of printed materials. Printing Industry in India has grown to such an extent that approximately 1,60,000 printing presses with 1.8 million families involved in this industry directly and indirectly.

India is the largest Democratic country in the World. It has more than 5000 towns and 600 districts and it is a known fact that the printing presses exists in all these cities and towns in India. India's print media is estimated to reach more than 400 million people. The Newspaper publishing industry boasts over approximately 356 million readers.

Today, India is fast becoming one of the major print producer and manufacture of printed paper products for the world markets. The quality standards have improved dramatically and immense production capacities have been created. Some leading printers have won recognition by winning prizes at international competition for excellence in printing. The current annual turnover of all the components in the Indian printing industry are estimated more than US \$.1,100 crores.

Indian books, journals and printing jobs, etc. are being exported to over 120 countries of the world both developed and developing countries. Indian export comprises of books, text books, packaging materials, magazines, newspaper, calendars, printed pamphlets, newspapers and periodicals, job printing etc., etc.

The educational books printing is one of the major work for the Indian printers. According to a sample survey it was revealed that about \$ 2.5 billion accounts for text printing for different categories of education system.

India has several printing academic bodies which include more than 35 Printing Engineering Colleges, several diploma schools and many a print training institutions and they produce more than 4000 graduates and several thousands of technicians in printing every year.

The factors such as increasing literacy, entering global brands in the country, increasing consumerism and sector's opening to foreign investors would lead to further growth in print media. Also, widening newspaper companies and their spreading across newer segments would have a positive impact on its growth.

The progressive printers in India are equipped with the latest computer controlled printing machines and flow lines for binding, while state of the art digital technologies are being used in pre-press.

Leading print companies have optimized the use of information technology in each and every area of their business. These printers are today equipped at par with the best print production facilities in the world. There are more than 2.5 lakhs printing presses in India. 75% of these are single and two-colour presses. During the past three years, about 500 new offset printing plants have been established. This number is expected to double by 2012.

Indian printers use about 10 million tonnes of paper and board each year which includes domestic and imported paper. According to Indian paper manufacturers, this paper consumption is expected to double by 2015. The consumption of the packaging industry will be a huge one. The major paper mills in India are JK Paper, Ballarpur Industries, Tamil Nadu Newsprint & Papers (TNPL), West Coast Paper Mills etc., etc.

Today, machinery suppliers continue to explore ways to improve press efficiency and productivity through larger formats and perfecter machines. The argument is that by increasing sheet sizes, the printing of books, posters and packaging becomes more efficient.

Since January 2009, there have been more than 100 violet platesetters and 50 thermal platesetters installed in India. In addition, there are 20 refurbished and 10 CTCP platesetters plus 500+ installations of TechNova's CT Poli systems.

The Indian Print industry has a new bunch of young print entrepreneurs. They are very well educated. Most of these youngsters are trying hard for new avenues in printing so as to ensure the safe sailing of their industry. They tend to identify different requirements of the market and finding new products from the print industry to meet the challenges of the time. Their relationships with clients tends to revolve around more than just supplying them with a quote but they operate to gear up the supply chain and get involved in projects as early as possible, working with agencies, data houses and clients directly.

According to Pira, the market was worth \$146 billion in 2009, of which Indian print's share was projected at \$14.1 billion. The report notes that, while the value of the market will fall, the number of A4 printed pages will only contract by 2% to just less than seven trillion. India produces about 150 million digital pages of which a majority is in the black and white segment.

India's digital printing industry is growing at a rate of 25.8% every three year. The major digital machine suppliers are Creo, Scitex, Roland Japan, HP, Cannon. Digital printing of photobooks is one of the fastest growing markets in India. Xerox India announced installation of hundred-plus installations of Xerox DocuColor 5000 in the country. HP Indigo speaks of notching 100 installations with their Indigos. Canon speaks of more than 50 customers. Konica has achieved 100 installations. High-end presses like Nexpress and MGI have a smaller base.

The global players who dominate the ink supply are DIC/Sun Chemical, Flint Group Toyo Ink, Sakata Ink, Siegwark Group and Huber Group (Micro Inks) In India, Micro is the largest player in the market. And along with DIC, Siegwark, Toyo, Sakata, Huber and Flint have 95 % share in the Indian market. The remaining 5% is dominated by 150 players in the domestic market.

The major print buying sectors in India are Education, Publication / books, Real estate Retail, Telecom, Auto industry, Branding, Events, TV channels, Mobile companies, Banks and financial institutions, exporters etc.

The Indian printing fraternity has an apex body of Indian printers – All India Federation of Master Printers (AIFMP) representing about 59 regional affiliate printers associations from various parts of the country recognised by the Government of India. All India Federation of Master Printers (AIFMP) was formed in 1953 which spread in all over the country having 1.5 lacs printers. The affairs of AIFMP are conducted by a Governing Council (GC) that has, as its members, representatives from all the affiliate associations. The GC elects the office bearers for AIFMP annually. The President is rotated once a year from the 4 zones of the association.

Governing Council meet four times in a year i.e. every three months Governing Council meeting is held in different parts of the country which are hosted by Affiliate Associations of AIFMP.

Since its inception, the AIFMP has done sterling work to increase the prestige and influence of the printing industry and help it render better and more useful service to the fraternity. In a quest to give voice to the concerns of the Indian Printing Industry, AIFMP supports, participates and organises a number of regional, national and international events with the aim of lobbying for the interests of the Indian printers, showcasing the Indian printing industry's achievements and holding Technical Seminars for educating the printers about global trends and technologies. It actively participates in all the international exhibitions. The flagship project of Printing and Allied Machinery Exhibitions (PAMEX) of AIFMP is now being organised every two years in metropolitan cities along with seminars and conferences. The next PAMEX i.e. PAMEX-2011 is going to be held during November 1-4, 2011 at Pragati Maidan, New Delhi. After 2011, PAMEX will be organised in 2013 in the month of January at Mumbai. These events, besides giving the opportunity to the printers to interact with each other, also help them at regional and national levels to keep them well informed about the latest technological developments in the graphic arts and media industries.

Print Symposium, a 'Knowledge Seminar' was organised by All India Federation of Master Printers on February 25, 2011 at New Delhi. AIFMP will organise Print Symposium on regular basis during February every year. Printers Day is also celebrated by all Affiliates on 24 February every year.

AIFMP will celebrate "Printers' Family Day", on 1st May motivating the employees to recognise the well being of all and also to remember the day in memory of their parents.

AIFMP has been at the forefront of initiating significant cooperation among the South Asian Printers through Asian Print Congress (APC) among SAARC countries and to create a shared vision of the future. It brings together, on one common platform, printers associations from all around to meet, discuss, debate, exchange and agrees on matters related to the printing industry in diverse areas.

AIFMP has instituted the National Awards for Excellence in Printing (NAEP) to celebrate the quest for quality that is at the heart of the printing industry. The forthcoming NAEP will be organised at Bangalore during September 2011.

To facilitate greater regional and global cooperation among allied bodies, AIFMP has signed a

number of agreements with various associations from different countries - Sri Lanka Association of Printers, NPES (USA), Association of Italian Manufacturers of Machinery for graphics (ACIMGA), Printing and Printing Equipments Industries Association of China (PEIAC) and Mexican Chamber of Graphic Arts (CANAGRAF).

AIFMP takes up various issues with Government of India under Ministry of Finance, Ministry of Commerce & Industry, Ministry of Labour and Employment, Ministry Micro Small and Medium Enterprises relating to Excise and Custom Duties, Direct & Indirect Taxes, Banking Reforms, Labour Laws, SSIs etc. which affect the printing industry. AIFMP is also a member of Confederation of Indian Industries (CII), Federation of Indian Chamber of Commerce and Industry (FICCI), Punjab, Haryana and Delhi Chamber of Commerce (PHDCCI) and Federation of Associations of Small Industries of India (FASII) and these issues are also raised with these organisations.

A need has been felt for some time for all organisations and associations working in the area of print media to come together for a common cause and to build on the existing synergies between them. AIFMP has been working towards strengthening this cooperation between various bodies and associations by organising joint seminars and conferences.

In the international arena, AIFMP, being a leading member of SAARC printing associations, plans to play a proactive role in building bridges worldwide, particularly in the Asia Pacific region. The 4th South Asia Print Congress was held at Goa during September 2009.

Apart from focusing on building cooperation with regional, national and international bodies, AIFMP's future plans include setting up training institutes in print technology, initiating a country-wide survey of the industry and developing an exhaustive data back of printers and allied industries.

In the prophetic words of Bernhard Schreiber, the CEO of Heidelberg 'By putting all the insights in a nut shell, the historic development, the current situation, the social, industrial and political circumstances, it can be stated without any doubt, that by 2015, India will be one of the leading printing nations of the world'.
