

## Digital Printing Market in Japan: Key Research Findings 2017

### ◆ Research Outline

Yano Research Institute has conducted a study on the domestic digital printing market with the following conditions:

1. Research period: May to July, 2017
2. Research target: Domestic leading digital printing businesses
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone, and mail-in questionnaire

#### What is the Digital Printing Market?

The digital printing market in this research consists of the printed matter, printed by means of commercial digital printing machines, and of servicing. The companies surveyed are those whose main business is printing. No printed matter or servicing that use conventional press with printing plates is included.

The printing areas surveyed are those for general purposes (i.e., publication, commercial printing, and business-form printing), as well as soft-packaging printing, and do not include any other printing areas.

### ◆ Key Findings

#### ■ Digital Printing Market in FY2015 Rose by 8.7% on Y-o-Y Basis to Attain 329.745 Billion Yen, but Declined in FY2016 by 2.1% on Y-o-Y Basis to 322.920 Billion Yen

Size of the digital printing market in FY2015 rose by 8.7% from the previous fiscal year to attain 329.745 billion yen, based on the sales of the enterprises. This sharp increase stems largely from the expanded demand due to enforcement of My Number System (Social Security and Tax Number System). To be specific, DPS (data printing services) were used for informing of My Number System to the public when the system was enforced in October, 2015, and also BPO (Business Process Outsourcing) for collecting My Numbers, a process generated after informing of the number. Informing of My Number to the public was naturally conducted to all the households throughout Japan, so that BPO used for it became unprecedentedly large scale. However, because the cases to collect the numbers have decreased from last fiscal year, in addition to the end of informing of My Numbers, the market size in FY2016 is likely to shrink by 2.1% from the previous fiscal year to attain 322.920 billion yen.

#### ■ Digital Printing Market in FY2017 Projected to Attain 327.37 Billion Yen, Up by 1.4% on Y-o-Y Basis

The digital printing market in FY2017 is projected to rise by 1.4% from the previous fiscal year to achieve 327.37 billion yen. With respect to the POD (Print on Demand) market, it has shown relatively favorable perspectives, due to the demands both of office-CVS (i.e., those stores providing office supplies and services) and photo books expected to be on the rise further,

in spite of stagnancy of other areas within the market. On the other hand, the growth rate of the DPS market, the largest sector of the digital printing market, is likely to quieten down for the next few years because of uncertainty of the future demand for My Numbers. Therefore, generally speaking, growth speed of the digital printing market for the next few years is likely to slow down.

◆ **Report Format:**

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Price: 150,000 yen (the consumption tax shall be additionally charged for the sales in Japan.)

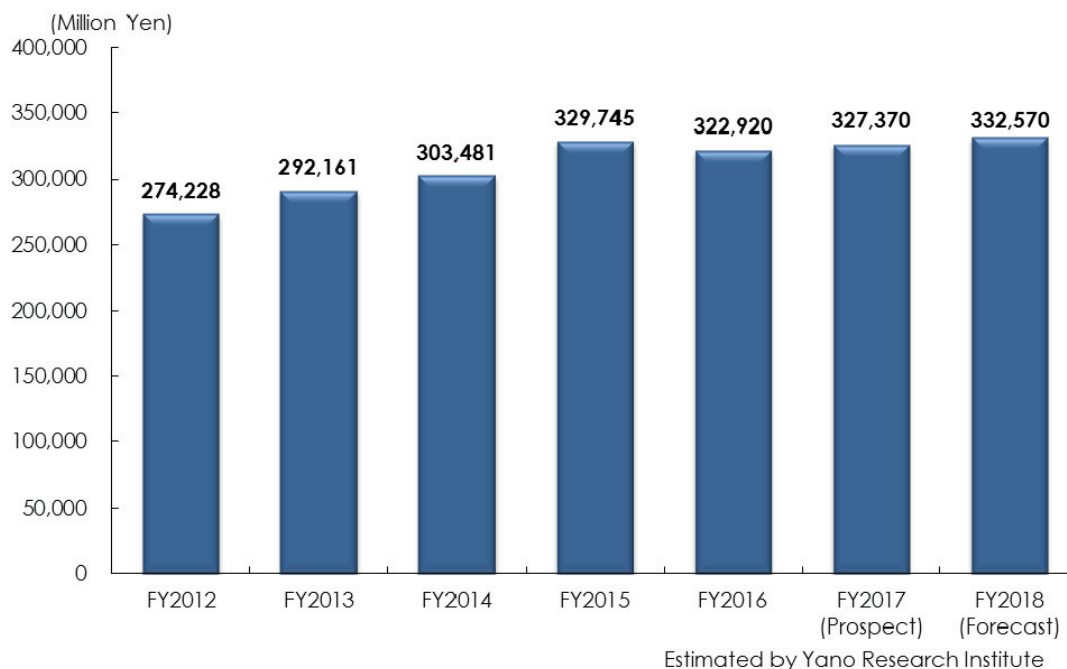
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■ **Figure 1: Transition and Forecast of Digital Printing Market Size**



Notes:

1. The market size is based on sales of the businesses.
2. The value of FY2017 is a prospect, and that of FY2018 is a forecast.
3. The digital printing market in this research consists of the printed matter, printed by means of commercial digital printing machines, and of servicing. The companies surveyed are those whose main business is printing. No printed matter or servicing that use conventional press with printing plates is included. The printing areas surveyed are those for general purposes (i.e., publication, commercial printing, and business-form printing), as well as soft-packaging printing, and do not include any other printing areas.