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*InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses. Additional information about InfoTrends is available on the Web at [www.infotrends.com](http://www.infotrends.com).*

## **Production Digital Printing in Russia: A Multi-Client Report**

- Russia is now a top target for global marketers of production-level digital printing equipment such as roll fed lasers and full color digital presses.
- Russia has a booming economy (8.1% GDP growth, 2006-2007), 143 million people, and a 99%+ literacy rate, all together a top market for print.
- Russia has an established and sophisticated graphic arts industry, with over 7,000 print service providers.
- InfoTrends is doing extensive in-country research now to characterize and forecast this valuable and growing market.

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## Who Should Subscribe?

Production Digital Printing in Russia:  
A Multi-Client Report *will be a valuable resource for:*

- *Equipment manufacturers*
  - *Software vendors*
  - *Paper manufacturers*
  - *Equipment and supplies distributors*
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## Introduction

For suppliers to the global digital printing marketplace, Russia has become an attractive, even tantalizing target that requires dedicated research and evaluation. Fueled by booming oil and commodities markets, privatization, and ever-greater integration with the international business community, Russia's GDP grew at an 8.1% rate to reach \$2.1 trillion in 2007. Nor was this an anomaly—growth in recent years has averaged about 7%. Russia is thus a strong economy, one that imported \$260 billion in goods and services last year. With 141 million citizens and a 99%+ literacy rate, the print-consuming public in Russia is 72% larger than Germany's. Finally, Russia is also home to an established and sophisticated graphic arts industry, with over 7,000 print enterprises of various types.

Print is important in Russia. Although Russia is by no means a technical laggard overall, preliminary desk research indicates that Russian individuals, enterprises, and government organizations are lower down the curve than fully developed countries in terms of the shift from paper to electronic documents.

What is the current state of production-level digital printing within this vital market and its printing industry, and what does its future hold? To answer these two questions, InfoTrends is undertaking new and detailed market research in Russia. This report aims to estimate and forecast the production digital printing market in Russia, and gain important qualitative insights about Russian print providers, their applications, their plans, and their preferences. This report will offer critical guidance to those who are selling digital printing equipment, software, and supplies to the Russian market or may do so in the future.

## Project Objectives

This report is a geographic extension of InfoTrends' regular coverage of production printing markets, which are emerging globally. The focus of this report is production-level digital printing equipment and supplies, defined as follows:

- Cut sheet color digital printers producing at least 60 ppm
- Cut sheet monochrome digital printers with duty cycles of at least 1 million monthly impressions
- All continuous-feed digital printing systems

The report will also offer less detailed insights into:

- Related workflow and applications software
- Related mailing/bindery/finishing equipment
- Paper sizes, grades/finishes, and weights

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To support the strategic and tactical needs of subscribers, this report will address each of the following objectives about the production digital printing market in Russia:

- Describe the overall Russian printing industry
  - Conventional and digital printing
  - Commercial printers, service bureaus, and in-plant print shops
  - Industry trends for print service providers, private enterprises, and government agencies
- Describe the role of production digital printing within the industry
  - Numbers of print service providers and in-plants with production digital printing
  - Segmentation by type (e.g., commercial printers with digital capabilities)
  - Major applications (e.g., promotional, transactional, direct mail, book printing)
  - Main channels for production print systems and supplies
  - Relative roles of major vendors
- Size and forecast the production digital printing market
  - Unit shipments, installed base
  - Average selling price, total revenues
  - Supplies revenues, paper tonnage, value of print
  - Growth rates for 2007-2012
- Gather key insights about Russian production digital print providers
  - Insights from users of production digital printing systems
  - Equipment profile
  - Applications, average print volumes, and paper usage
  - Brand ownership, awareness, and preferences
  - Growth in annual revenues from black & white and color digital
  - Buying preferences and purchasing plans
  - Product requirements
  - Channel preferences
- Deliver actionable conclusions and recommendations
  - A qualitative and quantitative understanding of the market, its applications, and its users
  - The size of the current market, the available market, and the future market
  - The must-know considerations about channels, applications, and user concerns

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## How This Study Can Benefit Your Organization

*Production Digital Printing in Russia: A Multi-Client Report* will help your company:

- Prioritize product and market opportunities
- Estimate and forecast the production digital printing market
- Understand how the market is currently segmented and how it will likely change
- Understand the trends impacting the market
- Identify new business opportunities
- Support strategic planning for products and services
- Improve sales and marketing activities in key market segments in Russia
- Understand the purchasing process and preferences of the Russian market
- Understand customer perceptions, brand preferences, and requirements

## Methodology

To achieve the objectives described above, InfoTrends will use four main research methods:

- A structured survey of 200 Russian print service providers with production digital printing equipment
- In-depth interviews with 10 OEMs, distributors, and paper merchants
- In-depth interviews with 15 print service providers
- Desk research and analysis

## Structured Survey

InfoTrends will survey 200 production print providers with production digital printing equipment in Russia. The survey will be conducted in Russian with the assistance of the Moscow State University of Graphic Arts. The survey will provide statistically valid data on the following topics:

- Company size (revenue, employees)
- Industry focus (type of print provider)
- Equipment mix
- Primary applications
- Average job size, average total page volumes
- Role and prospect of production digital printing
- Key financial metrics (supplies, maintenance spending, etc.)
- Channels used for equipment acquisition

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- Paper purchasing trends and preferences
- Level of satisfaction with existing equipment
- Decision criteria for future production digital printer acquisitions
- Purchase plans

## **Personal Interviews**

InfoTrends will conduct 10 interviews with OEMs, distributors, and paper merchants as well as 15 interviews with print service providers. Interviews will be conducted in Russian by a senior partner to InfoTrends and by the Moscow University of Graphic Arts. Interviews will be conducted via telephone and in person.

Interviews with OEMs and channel participants will elicit insights about:

- The status of the various vendors, technologies, and products
- The outlook for different applications, technologies, and products
- Major trends
- Overview of distribution channels
- The role of distributors

Interviews with print service providers will seek qualitative insights that will augment the quantitative insights of the report's structured survey. The interviews will obtain insights about:

- Views on the various brands and OEMs
- Views on servicing
- Technology preferences
- Key digital applications
- Reasons for adopting digital printing
- Future expectations on growth of digital printing, changes in share of print volume as segmented by print technology
- Key trends as seen by print providers

## **Desk Research and Analysis**

InfoTrends will conduct extensive secondary research that thoroughly examines existing information on the commercial printing market in Russia. InfoTrends will utilize a wide variety of sources, including:

- Industry trade associations and publications
- Government agencies
- Published industry reports
- Web sites
- Vendor conference presentations and white papers

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InfoTrends will work closely with its Russian research partners for this project to analyze the structured survey results, aggregate the findings of all personal interviews, and develop market estimates and forecasts that describe the current and future market in Russia. Based on this collective and fully analyzed research, InfoTrends will make conclusions and recommendations for clients' consideration and action.

## **Deliverables**

Subscribers will receive a combination of reports, presentation materials, and data for senior management, product managers and planners, and sales and marketing executives. The report includes:

- A written report, electronically delivered in PDF, 100 pages or more in length, including:
  - An executive summary of the findings and conclusions
  - A detailed description of the research findings
  - Conclusions and recommendations based on analysis of the findings
  - Numerous supporting charts and tables
- A set of PowerPoint slides for subscribers' use in internal communication of the report's findings

A complete set of the tabulated data from the structured survey is also available for a small additional fee.

Also available for a small additional cost is a private Webinar presentation. This Web-based version of the report will be delivered by the report's authors at a time that is convenient for your team and will allow time for questions and answers. Clients ordering a private Webinar will also receive an electronic copy of the entire presentation for further internal use.

## **Project Schedule**

InfoTrends will launch this study in April 2008 and will publish the findings by September 2008.

The key schedule landmarks are:

- Structured survey and in-depth interview guides finalized by April 30, 2008
- Structured survey and in-depth interviews completed by June 30, 2008
- Data tabulations and supporting charts completed by July 15, 2008
- Analysis of field and desk research completed by August 1, 2008
- Report delivered by August 31, 2008

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## **Terms and Conditions**

### **Liability for Advice**

Although all reasonable efforts will be made by InfoTrends to ensure the completeness and accuracy of the information contained in written and oral reports in connection with the proposed study, no liability can be accepted by InfoTrends for the results of any actions taken by the client in connection with such information, opinions, or advice.

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### **Confidentiality**

InfoTrends will use its best efforts to ensure that any confidential information obtained about the client and its business during the course of the proposed study is not, unless agreed otherwise in advance, disclosed to any third party without the prior written permission of the client. InfoTrends retains the right to reuse any non-proprietary information as part of our ongoing analysis of the print buyer market.

### **Timely Delivery**

InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

### **Terms**

One half of the fee upon initiation and one half upon report delivery.

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## Authorization Form

### Production Digital Printing in Russia: A Multi-Client Report

I would like further information. Please have a representative call.

Please enter my order as follows (fax completed form to +1 781 616 2121):

#### Final Report and PowerPoint Slides:

- Early subscriber (on or before June 2, 2008): \$12,995
- Subscriber (after June 2, 2008): \$14,495

#### Full Tabulation of Structured Survey:

- Early subscriber (on or before June 2, 2008): \$1,500
- Subscriber (after June 2, 2008): \$1,650

#### Private Webinar Presentation

- Early subscriber (on or before June 2, 2008): \$1,500
- Subscriber (after June 2, 2008): Same Price

Purchase order number: \_\_\_\_\_

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Name \_\_\_\_\_

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Company \_\_\_\_\_

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Country \_\_\_\_\_

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Email \_\_\_\_\_