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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.

China's Wide Format Graphics Market

- Market structure, size and forecast
- Equipment usage, product requirements and purchase plans
- OEM vs. third party ink and media
- Information sources and distribution channels
- Regional differences
- Major domestic & international suppliers
- Value chain analysis

Prospectus

Who Should Subscribe?

- *Wide format printer manufacturers*
 - *Wide format supplies manufacturers*
 - *Wide format system and supplies distributors*
 - *Major print service providers*
-

Introduction

The sheer size of the Chinese market and its red-hot economy combine to make it one of the most exciting global markets for wide format printing systems. The printing industry in China is growing at a much higher rate than more mature economies such as North America, Japan, or Western Europe. This growth presents significant opportunities as well as threats. For equipment and supplies vendors, this growth represents an opportunity for incremental growth. For print service providers, it represents new competition and new opportunities for partnerships.

InfoTrends has performed some initial market research in China and is now launching a comprehensive study of the Chinese wide format printing market. This study will enable subscribers to gain a solid understanding of China's market structure and opportunity. It will enable you to make more informed decisions about China in the years ahead.

Project Objectives

- Market structure, size, and forecast for wide format graphic printing hardware and supplies
 - o Number of print providers
 - o Placements and installed base of equipment
 - o Ink consumption
 - o Media consumption
 - o Average selling prices
 - o Revenue
 - o Brand market share estimates
- Perspectives from manufacturers, dealers, and end-users
 - o Marketing programs (advertising, trade events, direct, etc.)
 - o Use of distribution channels for hardware, ink, and media
 - o Regional differences
 - o Identification of major distribution companies
 - o Perspectives on near and long-term issues and opportunities
 - o Pricing and revenue chain analysis
 - o Service and support programs
- In-depth interviews and structured survey with end users
 - o Equipment usage
 - o Brand awareness, preference, and share
 - o Applications
 - o Information sources
 - o Channel usage
 - o Purchase plans (investment level & timing)

Prospectus

- o OEM vs. third-party ink and media
- o Domestic & outsourced/offshored production
- Recommendations
 - o Product features and pricing
 - o Distribution
 - o Marketing
 - o Service and support
 - o Target markets and applications

Critical Questions Answered by this Study

Questions that will be posed to the industry and users include:

- What type(s) of wide format printing equipment do you currently own? How many of each type?
 - o Printers (by technology, size)
 - o RIPs
 - o Laminating
- What are your planned equipment expenditures?
 - o Type
 - o Timeframe
 - o Size of expenditure
 - o Reason for expenditure
- What application software do you use? What file formats do you support?
- How much do you spend on ink and media?
- How much do you expect to pay per liter or per cartridge of ink?
- How much do you pay for a roll of different types of print media?
- What are your brand preferences for wide format printing equipment, ink, and media?
 - o OEM vs. third-party
- From what distributors do you buy equipment, ink, and media?
- What do you believe is the outlook for your business? Growth? Decline? How much?
- What types of applications do you produce? What portion are indoor vs. outdoor graphics?
- What is your average monthly print volume in square meters by type of media?
 - o Paper
 - o Vinyl
 - o Film
 - o Substrates
 - o Other
- What do you charge for different types of wide format print services?
 - o Price per square meter
 - o Price for different media
 - o Finishing
- Are there environmental concerns that play a role in your purchasing decisions?

Prospectus

- o Use of solvents
- o Use of UV-curable materials
- o Use of non-recyclable substrates
- What portion of your output is laminated, mounted, or finished? How much do you spend on laminating?
- What sources do you use to learn about new products and services for your business?
 - o Associations
 - o Magazines
 - o Distribution channels
 - o Web sites
 - o Vendors
- What are the differences by major regions within China?
- Who are your major customers?

Market Research

This study will use a combination of secondary and primary research to determine the barriers and market requirements for wide format printing systems in China.

Secondary Research

InfoTrends has conducted extensive research in the wide format and print on demand markets. We will leverage relevant research reports and forecasts as part of this study. We will also thoroughly examine existing market information from a variety of sources, including government, industry association data, and published reports.

Primary Research

In-Depth Interviews with Print Service Providers (15)

InfoTrends will interview printing companies to understand their usage patterns, purchase plans, information sources, product requirements, and opinions for wide format graphics. Through these interviews, we will have the ability to suggest the most attractive target markets for wide format print providers and technology vendors.

In-Depth Interviews with Leading Manufacturers and Distributors (15)

InfoTrends will conduct a series of in-depth interviews with global and domestic Chinese hardware and supplies manufacturers and leading dealers to understand the focus that suppliers are placing on the Chinese market as well as market demand and requirements.

Structured Surveys with Print Service Providers (250)

InfoTrends will conduct a structured survey with approximately 250 print providers that use wide format printing equipment. This research will provide critical insights to the current state and strategic direction for wide format operations, including size, brand share, product requirements, and perceptions on unmet market needs and emerging opportunities.

Prospectus

Project Deliverables

InfoTrends will analyze the desk research, personal interviews, and structured survey to develop a comprehensive understanding of the opportunities and issues associated with wide format printing in China. Clients will receive a combination of reports, presentation materials, and research data for senior management, product managers and planners, and sales and marketing executives. The material will include:

- An executive summary that addresses key issues, findings, and overall recommendations
- A PowerPoint style report with text, charts, and graphs addressing the objectives of the study
- A set of data tabulations and charts for internal communication of the research results and additional analysis

Project Schedule

InfoTrends will conduct the market research for this study in August/September 2007. We will provide data tabs and charts immediately after completing the surveys. We will publish the executive summary and final report in November 2007.

The schedule is as follows:

- | | |
|-------------------|---|
| • August 31, 2007 | Last date for charter subscribers |
| • September 2007 | In-depth interviews/Web survey deployed |
| • October 2007 | Data tabulations and analysis work |
| • November 2007 | Final report delivered |

Project Fees

For clients that sign up before August 31st, the participation fee is \$8,995. Clients that sign up early can also provide input and review the interview guides.

After August 31st, the price of the study is \$9,995.

A personal presentation is available for an additional \$2,000 plus travel expenses.

Terms and Conditions

Liability for Advice

Although 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.

Copyrights

InfoTrends retains all copyrights. The reproduction of any materials is prohibited without written consent from InfoTrends.

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 re-use any non-proprietary information as part of its ongoing analysis of the office automation and printing and publishing industries.

Prospectus

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-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

Terms

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

Authorization Form

China Wide Format Graphics Market

For more information on the study or how to order, please send an e-mail to sales@infotrends.com.

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

- | | |
|--|-------------|
| <input type="checkbox"/> Charter subscriber (by August 31, 2007) | \$8,995 USD |
| <input type="checkbox"/> Subscriber (after August 31, 2007) | \$9,995 USD |
| <input type="checkbox"/> Personal presentation | \$2,000 USD |

Purchase order number: _____

Signature _____

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Title _____

Company _____

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