Worldwide Shipments of Silver Halide Color Paper in 2009

1.0 Introduction
For some time now, Photographic Consultants Ltd (PCL) has provided an annual report on silver halide color paper. Initially, the objectives were to estimate the quantity of paper shipped by each of world’s production facilities, dividing volumes by country/geography. However, beginning with last year’s report, we took on the additional task of dividing volumes by application; that is: consumer-type digital prints, consumer-type film prints, and non-consumer purposes. That work was a prelude to our World Photo Printing report, where we added in the contributions from inkjet, dye sub and electrophotographic technologies, along with projections out to 2012. Although we are not currently planning another World Photo Printing Report in 2010, we are, of course, carefully monitoring the development of all four photo printing technologies, and the demand for digital printing overall.

Although it has seen significant erosion from the 90% or so decline in film over the last nine years, demand for silver halide color paper remains relatively large – some 900 msm last year – owing to the fact that it is by far the largest single output medium for digital prints, and is still widely used in the professional/non-consumer segments. Thus, even though the photo printing industry is clearly shifting towards non-silver alternatives – due to the disappearance of film, reduced printing volumes at retail, and lucrative opportunities in duplex printing – following the development of the silver halide segment remains critical to understanding the overall digital print market (not to mention the potential for the other three technologies). In fact, with the exception of photo books made on electrophotographic presses, much of the impact of non-silver printing on silver halide has so far been confined to the United States, where dry labs are now rapidly replacing the longstanding silver halide minilab.

Prepared during the first two months of 2010, this report on silver halide color paper is based on an extensive analysis of available trade data, other publicly available information, where we felt it was reliable, and interviews with knowledgeable industry management. In addition, we have made use of a considerable amount of data and

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analysis from our files, including ongoing market research on film and digital printing volumes, and detailed knowledge of the world’s photo markets.