

Expanding U.S. Photo Printing Report – 2017

By F/22 Consulting & Photo-Imaging News

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Consumer Photo Printing

- **State of the U. S. Consumer Photo Print Market**
 - *“The overall state of the consumer photo printing business is healthy today and likely to experience robust acceleration of growth.”*
- **Confronting Change and Ambiguity**
- **Consumer Photo Printing by the Numbers**
 - 2016 Estimated Volume and Revenue by product type including: prints, photobooks, cards/stationary, calendars, gifts and decor
 - Production estimates by in-store (“minilab” and self-service kiosk) and from centralized print service providers.
 - 3-year projections for volume, revenue and production
 - The unprecedented impact of mobile (smartphones).
 - Estimated share of orders and revenues by leading photo output retailers.
 - Estimated share of retail photo output by product type.
 - Estimated share of retail chain output by various on-ramps
 - Estimated share of retail chain output by analog vs. various digital (ink-jet, dye-sub, toner) technologies.
- **Key Trends in Consumer Photo Printing**
- **Key Trend Drivers in Consumer Photo Printing**
- **Retail Innovation, with selected examples including:**
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- **Personalized Photo Printing “spilling” into new retail channels** (e.g. Home Furnishings, Office Supplies, Crafts, Stationary, Life-Style, Apparel)
- **The leading technology enablers for retailers who wish to offer consumer photo printing services.**
- **Google, Amazon and Apple as leading “Force Multipliers”**
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 - Digital Presses
 - Print Service Provider Network, including:
 - District Photo, Fujifilm, RPI, Circle Graphics, Jondo, ColorCentric, RR Donnelley, Taylor Corporation, Nations Photo/Artsy Couture, Colorado Timberline
 - Digital Printing Innovation for In-Store, including technologies and services from:

- Fujifilm, DNP, Noritsu, Kodak Alaris
 - Wide-Format, Duplex Printing and Photobook Solutions for retail chains
- **Innovations in Printing Materials**
- **Innovations in Finishing Technologies for Centralized Production**, including:
 - Horizon International, Photobook Technology, Imaging Solutions, Scodix, Motion Cutter
- **Exploration of a Major New Distribution Opportunity at Mass Retail for Print Service Providers**
- **Technology Innovation**, including:
 - Mobile apps, Cloud AI and AR
- **Future Growth Determinants**
- **What could Trigger Exponential Growth**

Professional Photo Printing

- **State of Professional Photo Printing**
- **Professional Photo Printing by the Numbers:**
 - A diverse industry – market segmentation
 - Nearly 250 million individuals in the U.S. had a professional photo taken in 2016 by one of more than 100,000 photographers at schools, conventions/events or as a professional portrait.
 - Total U.S. Professional Photo revenues in the U.S. in 2016 are estimated \$6.3B+.
 - School Pictures drove estimated revenues of \$2.5B+ in 2016 across the following segments:
 - Daycare/Nursery, Elementary, Junior High, Senior Pictures, Yearbooks, College Fraternities/Sororities, College Graduation, School teams/Dance/Sports
 - Conventions and Events drive an estimated \$2.8B in 2016 revenue from segments that include:
 - Weddings, Cruise Ships, Amusement/Theme Parks, Conventions, Photo Booth, Passports.
 - Portraits drove an estimated \$985M in revenues in 2016 from the following segments:
 - Family/Group, Newborn/Hospital, Church Directory, Pre-K children, Glamour, Executive, Promotional, Adults
- **Key Trends in Professional Printing**
- **Key Trend Drivers in Professional Printing**
- **Profiles of Leading Print Service Providers**, including:
 - Nations, White House, Millers/M-Pix, CG Pro, Inter-State, Bay Photo, H&H, Adoramapix, RitzPix, Lifetouch
- **Fujifilm Silver-Halide Photo Paper Innovation**
- **The Changing Pro Photographer**
 - *“Enter the Gig Economy”*
- **The “Democratization” of Pro Photography**
- **Supporting the “Gig” Pro Photographer**
- **Profiles of supporting organizations** including:
 - Click & company, WPPI, PhotoPlus Expo, Zenfolio, SmugMug

Total Photo Printing

- **Total estimated 2016 U.S. Photo Print Volume = \$10B+**

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- *“The flower that blooms in adversity is the rarest and most beautiful of all.”*
— Walt Disney Company, *Mulan*

Quotes on Photo Printing from Industry Leaders

Read what the following industry leaders have to say about photo printing in the U.S.:

- Sean Branham – Walmart Photo Centers
- David Oles – DNP Imagingcomm America
- Terry Rayner – RR Donnelley & Sons
- John Doe – Jondo
- Haim Levit – HP Indigo & Inkjet Press Solutions, Americas
- Andrew Laffoon – Mixbook
- Fred Lerner – Mailpix
- Rick Bellamy – RPI
- Nicki Zongrone – Kodak Alaris
- Ryan Millman – Nations Photo Lab | Artsy Couture
- Ron Kubura – Noritsu
- Bridgette Peleman-Vantiegham – Peleman USA
- Brad Malcolm – Athentech

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