Commercial Printing

US Industry Study with Forecasts for **2011 & 2016**

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US Industry Study with Forecasts for ***2011 & 2016***

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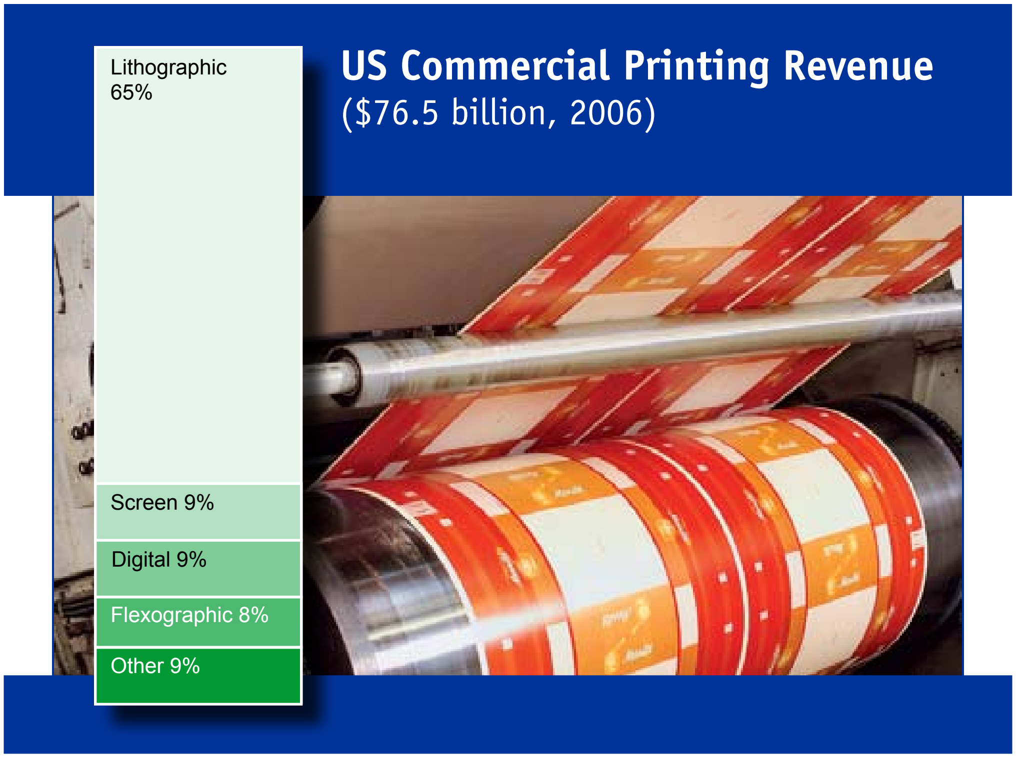
Digital printing is projected to achieve the strongest gains in US commercial printing demand because of the process' lower cost, quick turnaround and ease of customization for short printing runs.

US market to reach $82 billion in 2011

Revenues for the US commercial printing industry, which includes pre-press and printing services on a job order basis, are expected to increase 1.3 percent per year to $82 billion in 2011. Growth in commercial printing revenues will be driven by ongoing technological changes that make it easier to create higher quality and more customized prints at a faster rate. Gains will also be aided by ongoing adjustments in print production in response to changing consumer preferences, particularly in terms of cost, timing and sizes of print runs. Digital printing is projected to achieve the strongest gains because of the process' lower cost, quick turnaround and ease of customization for short printing runs. This rapid growth is expected to power digital printing to soon surpass screen printing and account for the second largest share of commercial printing revenues, behind lithographic printing.



Advertising to remain largest market

In 2006, advertising was the largest application for commercial printing. Despite competition from non-print advertising, print advertising continues to grow because print offers greater consumer targeting and the familiarity and portability that many consumers still prefer. Additionally, print is seen as being able to cut through the clutter of other advertising media in that consumers reliably look at their mail for at least a moment and advertising inserts remain one of the most popular sections of a newspaper. Improvements in total advertising expenditures also drive print revenues, albeit to a lesser degree than in previous eras in light of current competition between print and electronic media advertising.

Label, wrapper printing segment to lead gains

The label and wrapper printing segment is expected to post the strongest growth through 2011 because of interest in customized labeling and other higher value printing and specialty graphics on such packaging. Gains are particularly strong in this segment because there is no functional competitor to printed labels and wrappers, unlike advertising, newspapers, periodicals and others that must compete with electronic media options. However, in this segment commercial printers compete with label converters that also have printing operations. The financial and legal forms and document segment is expected to post the next strongest growth rate, just above that projected for advertising. All other applications (e.g., periodicals, office products, catalogs and directories, garments and apparel, and books) are expected to remain essentially flat over the forecast period, either posting very small gains or declining slightly.

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Sample Text, Table & Chart

TABLE III-5

FLEXOGRAPHIC COMMERCIAL PRINTING REVENUE
(million dollars)

Item	1996	2001	2006	2011	2016
Gross Domestic Product (bil $)					
$ printing/000$ GDP					
Commercial Flexographic Print Revs					
Advertising Printing					
Label & Wrapper Printing					
Office Product Printing					
Financial & Legal Printing					
Book Printing					
Other Printing					
% flexographic					
Commercial Printing Revenue					

SAMPLE TABLE

COMMERCIAL PRINTING PROCESSES

Flexographic Printing

Flexographic commercial printing revenues are forecast ... billion in 2011. This rate is above ...g revenues and is expected to be ...rinting. Advances in flexographic ...its widespread use in label and fle... area for the commercial printing ...ances, including further penetratio... (computer-guided laser etching of ... and photopolymer plates, will also contribute to gains by imp... quality and printing speeds. These improvements have allow... graphic printing, which is especially suited to short- to medium-sized runs, to make gains at the expense of gravure and lithographic printing.

SAMPLE TEXT

However, similar to most other segments of the commercial printing industry, growth will be slowed by competition from digital printing in many applications. Commercial printers with flexographic capabilities also face stiff competition from label and packaging converters who still dominate many packaging applications.

Key advantages to flexographic printing include the production of prints featuring vibrant colors with little ruboff. Flexographic printing is amenable to use with a wide variety of substrates including plastic film, textiles and various grades of paper. For instance, in the wrapper segment, flexographic printing competed with gravure printing, but flexographic printing can be used with low density polyethylene (LDPE), a substrate that gravure is less able to support. The use of this printing process further benefits from its ability to be used in combination with laminating, die cutting, slitting, winding and other process equipment as well. Other key benefits include a relatively simple printing operation and its ability to adapt to the use of water-based inks, which result in significantly reduced VOCs compared to solvent-based printing inks.

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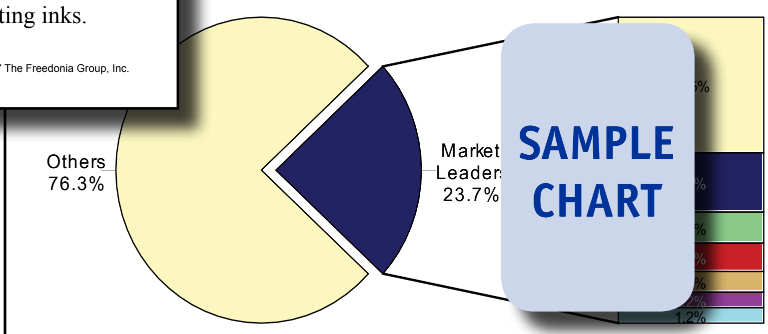
CHART V-1

...MERCIAL PRINTING MARKET SHARE, 2006
($76.5 billion)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE IV-12

FINANCIAL & LEGAL FORM & DOCUMENT PRINTING REVENUE BY PRODUCT (million dollars)

Item	1996	2001	2006	2011	2016
Gross Domestic Product (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ printing/000$ GDP	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Financial & Legal Printing Revenue	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
SEC Filings & Prospectuses	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
ARs/Other Corp Financial Docs	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Bank Forms	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other Bank Documents	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Miscellaneous Financial/Legal Docs	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

Ennis Incorporated
2441 Presidential Parkway
Midlothian, TX 76065
972-775-9
http://ww

Sales: $
Employ

Key Serv ... sheet, note pads,
tag, labe ... sensitive product,
advertisi

SAMPLE PROFILE

Ennis prints and constructs a broad line of business forms and other business products, and manufactures a line of activewear for distribution throughout North America. The Company operates via two segments: Print and Apparel.

The Company competes in the commercial printing industry through the Print segment. The segment had FY 2007 sales of $326 million, most of which was generated in the US. The segment consists of three groups: Forms Solutions, Promotional Solutions and Financial Solutions.

Forms Solutions Group -- The Forms Solutions group prints snap sets, business forms, continuous forms, laser cut sheets, tags, labels, integrated products, jumbo rolls and pressure sensitive products under the ENNIS, ROYAL, TBF/AVANT-GARDE, 360º CUSTOM LABELS, WITT PRINTING and CALIBRATED FORMS brand names. The Forms Solutions group sells these products through approximately 40,000 private printers and independent distributors.

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"Revenues from commercial printing of SEC filings and prospectuses are projected to increase 2.1 percent per year to $1.1 billion in 2011. Advances will be driven by the increasing number of firms and funds subject to SEC requirements. Gains will also be aided by changes in the disclosure requirements, including regulation SD, leading to more frequent SEC filings for corporate news."
--Section IV, pg. 118

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Other Studies

Pigments: Inorganic, Organic & Specialty

US color pigment demand will grow 4.4% yearly through 2011, driven by a shift toward high-performance organic pigments and specialty types. Metallic, pearlescent and other specialty pigments will lead gains based on the need for more novel, eye-catching optical effects in automotive coatings, printing inks, plastics, cosmetics and toiletries. This study analyzes the $3 billion US pigments industry, with forecasts for 2011 and 2016 by type and market. It also details market share and profiles major players.

#2232 .... 08/2007..................... $4500

World Labels

The global label market will grow 5.5% annually through 2011, driven by the diffusion of advanced logistics in developing areas and the development and penetration of smart radio frequency and value-added labels. The best gains will occur in emerging economies. This study analyzes the $67 billion world label industry, with forecasts for 2011 and 2016 by label material, application method, printing technology, world region and for 21 major countries. It also evaluates market share and profiles major players.

#2219 .... 06/2007..................... $5500

Commercial & Residential Cleaning Services

US commercial and residential cleaning service sales will grow 5.3% annually through 2011. Gains will be driven by the shift toward "do-it-for-me" cleaning services in the residential market, and by the outsourcing of noncore functions in the nonresidential market. This study analyzes the $48.4 billion US contract cleaning service industry, with historical data and forecasts for 2011 and 2016 presented by service, market and region. The study also evaluates company market share and profiles leading players.

#2191 .... 05/2007..................... $4400

Building Maintenance Services

US revenues for building maintenance services will rise 5.6% annually through 2011, aided by a shift away from "do-it-yourself" to "do-it-for-me" maintenance for businesses and households. The nonresidential market will grow the fastest while swimming pool and building systems services will lead gains by type. This study analyzes the $69.9 billion US building maintenance service industry to 2011 and 2016 by type, market and region. It also evaluates company market share and profiles industry competitors.

#2177 .... 04/2007..................... $4400

Coated Fabrics

US demand for coated fabrics will grow 3.2% annually through 2010. Gains will be helped by a recovery in nonresidential wallcoverings, awnings and canopies, and by continued strength in protective clothing and motor vehicle airbags. Nonrubber coated fabrics will stay dominant while fabric-backed wallcoverings will grow the fastest. This study analyzes the $2.7 billion US coated fabric industry to 2010 and 2015 by product, substrate and market. It also evaluates company market share and profiles major producers.

#2143 .... 02/2007..................... $4400

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