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Commercial Printing

US Industry Study with Forecasts for **2014 & 2019**

Study #2615 | April 2010 | \$4700 | 240 pages



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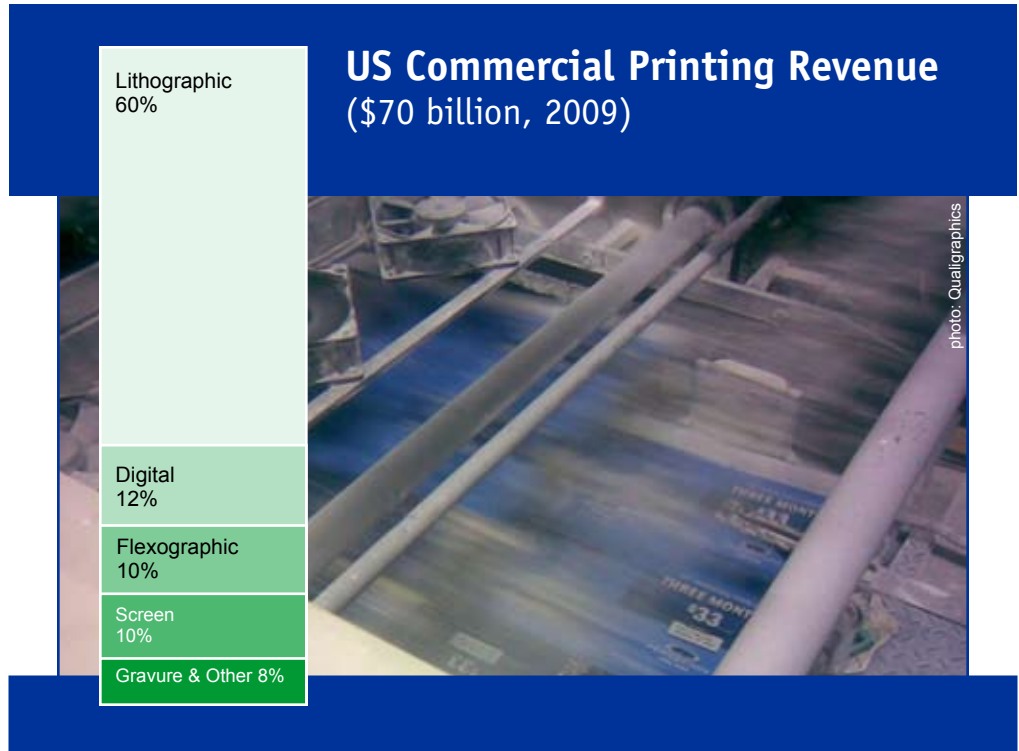
Technological improvements in the speed, quality and cost of printing, plus greater implementation of on-demand and variable-data printing, will boost commercial printing revenue.

US revenues to approach \$78 billion in 2014

Revenue for the US commercial printing industry, which includes prepress and printing services on a job order basis, is expected to increase 2.1 percent per year to \$77.7 billion in 2014. Growth of commercial printing revenue will be driven by ongoing technological improvements in the speed, quality and cost of printing. Increasing implementation of on-demand and variable-data printing will also boost advances. Gains will be aided by a cyclical rebound in advertising expenditures and increased outsourcing by newspaper publishers. Although the volume of printed pages in periodicals such as newspapers will fall, commercial printers will benefit as many publishers outsource their printing operations. Further growth will be restrained by the fact that most commercial printing applications compete with electronic alternatives available on personal computers and other devices.

Digital printing to achieve fastest gains in revenue

In 2009, lithographic printing accounted for the largest portion of commercial printing revenue, but this share is falling because lithographic printing tends to be less economical for shorter print runs. A trend toward shorter print runs will accommodate more customization and leaner inventories of printed products. Digital printing, which represented the second largest share of commercial printing revenue in 2009, is expected to



achieve the fastest gains through 2014 based on its lower cost, quick turnaround and ease of customization for shorter print runs. Digital technology is changing many printing applications -- such as direct mail and book publishing -- as it accommodates both variable-data printing for the creation of individualized products, and print-on-demand, which allows customers to shrink inventories. Digital printing continues to benefit from advances in speed of operation, image quality and product size range.

Advertising to continue as leading application

Advertising (direct mail, indoor and outdoor displays, preprinted newspaper

inserts, and other products) was the largest commercial printing application in 2009. Through 2014, commercially printed advertising is projected to post increases of 3.4 percent per annum, aided by the cyclical recovery of total advertising expenditures from a low 2009 base. Demand for direct mail and other commercially printed advertising will also be boosted by opportunities for customization using variable-data printing and other innovations. Other commercial printing applications forecast to achieve above-average gains through 2014 include periodical printing, garment and other fabric printing, and label and wrapper printing.

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Sample Text, Table & Chart

APPLICATIONS

Labels & Wrappers

Labels and wrappers, the third largest application for commercial printing, accounted for 15 percent of commercial printing revenue in 2009. Commercial printers produce only around half of US wrapper output, competing with manufacturers of packaging materials and label or packaging converters, neither of which are included in this study.

Revenue from labels and wrappers printed by commercial printers is expected to increase from \$10 billion in 2009 to \$12 billion in 2019, driven by general economic growth and demand for durable consumer goods, the value labels and wrappers. The market is growing at a 1.5 percent annual pace expected through 2019. Unlike most other commercial printing applications, label and wrapper printing does not face appreciable competition from electronic alternatives. The ubiquitous electronic systems in manufacturing, distribution and retail trade cannot operate without barcodes, radio frequency identification (RFID) and other labeling. Even when consumers purchase products online, labels are needed for shipping and inventory management.

New opportunities for commercial printers arise continually in the label and wrapper application segment. Despite the relative maturity of commercial printing, packaging and basic consumer products, demand for label and wrapper printing benefits from continual innovation in printing techniques (such as digital presses and UV-curable inks), materials (plastics, laminated composites and adhesives), labeling methods (flexo processing and security). Packaged goods producers are always looking for ways to use labels and wrappers to make them more enticing or informative because labels and wrappers are an essential part of a product's appeal. Changing food, pharmaceutical and environmental requirements are also driving demand.

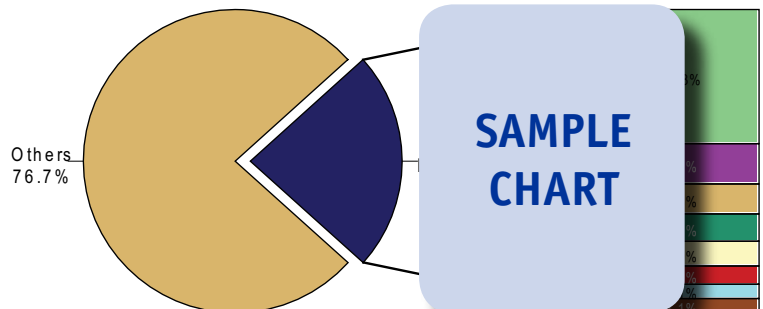
TABLE IV-6
LABEL & WRAPPER PRINTING REVENUE BY PRODUCT
 (million dollars)

Item	1999	2004	2009	2014	2019
Nondurable Goods Retail Sales (bil \$)	15	17	18	19	20
\$ printing/000\$ retail sales	0.04	0.04	0.04	0.04	0.04
Label Sales	0	0	0	0	0
\$ label printing/\$ label sales	0.6	0.6	0.6	0.6	0.6
Labels & Wrapper Printing Revenue	0	0	0	0	0
Labels:					
Pressure-Sensitive Paper	0	0	0	0	0
Other Paper	0	0	0	0	0
Other	0	0	0	0	0
Rolls & Sheets:					
Paper	0	0	0	0	0
Other	0	0	0	0	0
% labels & wrappers	6	6	6	6	6
Commercial Printing Revenue	74	77	77	77	75

SAMPLE TEXT

SAMPLE TABLE

CHART V-1
COMMERCIAL PRINTING MARKET SHARE BY COMPANY, 2009
 (\$70 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE III-1
COMMERCIAL PRINTING REVENUE BY PROCESS
 (million dollars)

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil \$)					14,000
\$ printing/000\$ GDP					0.7
Commercial Printing Revenue					50
Lithographic					30
Digital					20
Flexographic					50
Screen					20
Gravure					20
Other					300



COMPANY PROFILES

Ennis Incorporated

2441 Presidential Parkway
 Midlothian, TX 76065
 972-775-9801
<http://www.ennis.com>

Sales: \$5
 Employe

Key Services: forms, laser cut sheets, tags, labels, rolls, pressure-sensitive materials, presentation and document folders



Ennis Incorporated manufactures 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 participates in the US commercial print services industry via the Print segment. In FY 2009, the segment had sales of \$327 million, all of which was generated in the US. Through this segment, Ennis designs, prints and sells business forms and other printed business materials.

Among the products made through the Print segment are snap sets, continuous forms, laser cut sheets, tags, labels, envelopes, integrated products, jumbo rolls and pressure-sensitive materials, which are sold under the ENNIS, ROYAL BUSINESS FORMS, BLOCK GRAPHICS, SPECIALIZED PRINTED FORMS, 360° CUSTOM LABELS, ENFUSION, UNCOMPROMISED CHECK SOLUTIONS, WITT PRINTING, B&D LITHO OF ARIZONA, GENFORMS and CALIBRATED

“Flexographic commercial printing revenue is forecast to increase 4.0 percent per year to \$8.6 billion in 2014. This rate is above the average for total commercial printing revenue and is expected to be the second fastest rate behind digital printing. Advances in flexographic printing revenue are driven largely by its widespread use in label and flexible packaging applications, and its increasing use in office products applications. Technological advances, such as ...”
 --Section III, pg. 48

OTHER STUDIES

World Architectural Paint

Global demand for architectural paints will rise 3.6% yearly through 2013. The fastest gains will arise in emerging markets, mostly in Asia. The North American market will benefit from a recovery in the US housing market. Water-based formulations will continue to gain market share. This study analyzes the \$42 billion world architectural paint industry, with forecasts for 2013 and 2018 by market, end-user, formulation, world region and for 23 countries. It also evaluates company market share and profiles industry participants.

#2604 03/2010..... \$5800

Packaging Inks, Coatings & Additives

US demand for packaging inks, coatings and additives will rise 2.5% yearly through 2013. Demand will benefit from more environmentally friendly packaging, which will foster new sustainable and efficient products such as powder coatings, energy-curable inks and coatings, and bioplastic additives. This study analyzes the \$2.6 billion US packaging inks, coatings and additives industry, with forecasts for 2013 and 2018 by product type, substrate and packaging type. It also evaluates company market share and profiles industry players.

#2587 12/2009..... \$4600

World Kaolin

Global demand for processed kaolin clay products will reach 24.8 million metric tons in 2013, based in part on an improved paper market, which will offset a slower ceramics market. Strong growth in developing Asian countries will account for most new kaolin demand, with China alone claiming over half of the global gain. This study analyzes the \$3.1 billion world kaolin industry, with forecasts for 2013 and 2018 by market, world region and for 20 countries. It also evaluates company market share and profiles industry players.

#2579 12/2009..... \$5700

World Dyes & Organic Pigments

Global demand for dyes and organic pigments is forecast to grow 3.9% annually through 2013. Textiles will remain the largest market, while faster growth will occur in printing inks, paint and coatings, and plastics. The Asia/Pacific region will lead gains and increase its market share to one-half of world demand by 2013. This study analyzes the world dye and organic pigment industry, with forecasts for 2013 and 2018 by product, market, region and for 20 countries. It also evaluates market share and profiles industry players.

#2508 05/2009..... \$5800

Printing Inks

US printing ink demand will reach \$4.8 billion in 2013, supported by shifts toward more environmentally friendly ink formulations and digital inks. Among raw materials, additives and colorants will benefit from demand for better performing printing inks with brighter colors. Packaging will remain the largest and fastest-growing market. This study analyzes the US printing ink industry, with forecasts for 2013 and 2018 by raw material, product and market. It also evaluates company market share and profiles industry players.

#2462 02/2009..... \$4700

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