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# 2018 PRINT MARKET ATLAS

Data from the U.S. Census Bureau and the County Business Patterns Database

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## EXECUTIVE SUMMARY

The *2018 Print Market Atlas* marks the sixth year that data from the U.S. Census Bureau and the County Business Patterns database has been used to develop this report. This report contains the most recent 2016 information as the County Business Patterns database has a two-year lag in information release. In previous years, we used the A.F. Lewis Database. This *Atlas* uses a different data source, so data from the 2017 *Atlas* is only comparable to the 2011, 2012, 2013, and 2017 volumes.

### We segment the industry into two major categories:

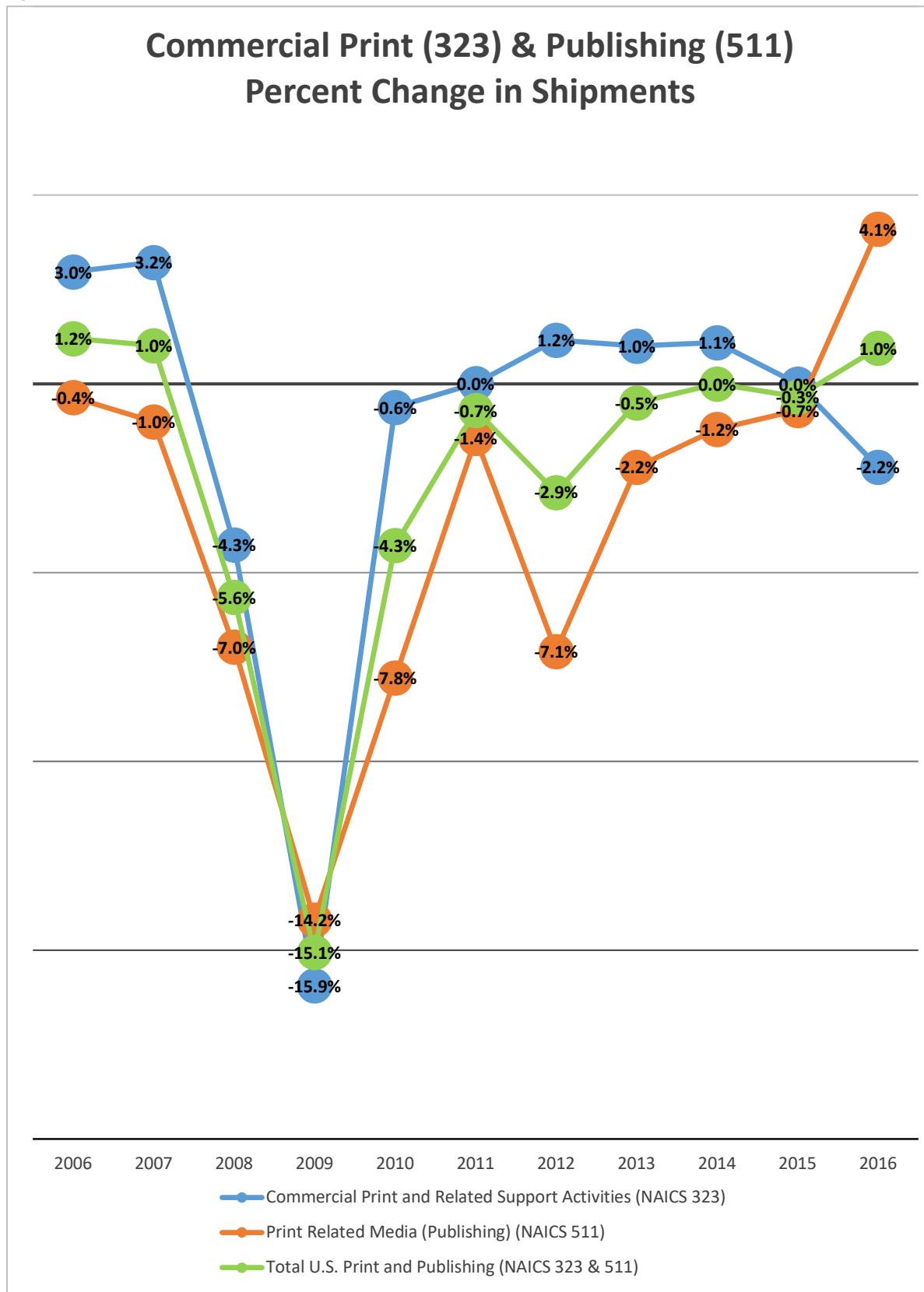
1. Commercial Print and Related Support Activities (NAICS 323)
2. Print-Related Media or Publishers (NAICS 511)

The Census Bureau breaks down publishing shipments by media type (print, online, and other). We only included the revenue that is generated by print in Print-Related Media shipments. We include publishing in our definition of the printing industry because of the following statement when defining Commercial Print and Related Support Activities: "When publishing and printing are done in the same establishment, the establishment is classified in Sector 51, Information, in the appropriate NAICS industry even if the receipts for printing exceed those for publishing." Industry shipments would be skewed downward significantly if this sector was ignored. By only including publishing revenue generated by printed material, we aim to limit any upward bias, although there is no way to calculate what that bias would be.

As you can see in Figure 1, industry shipments have been in decline since 2006, but 2016 has shown a divergence from the trend. Print-Related Media or Publishing printing increased this past year while Commercial Print and Related Support Activities print shipments declined. The 2018 *Atlas* contains year-end 2016 figures. According to our *2018 Print Market Atlas* model, industry shipments were positive due to growth in the publishing market. Overall Commercial Print and Related Support Activities print shipments decreased -2.2% from the previous year. While Print-Related Media shipments increased by 4.1%, which was an improvement over the past ten years, Total Print Industry Sales increased by 1% due to weakness in Commercial Print and Related Support Activity shipments. In fact, an increase in total shipments has not been observed since 2007.

The County Business Patterns database is updated each June. Next summer, we will publish the *2019 Print Market Atlas*, which will contain calendar year 2017 industry figures.

Figure 1.



The U.S. Census Bureau reclassified NAICS categories in 2012 and reduced the number of categories for industries experiencing consolidation like the printing industry. In the *2012 Print Market Atlas*, Commercial Print and Related Support Activities had twelve categories after consolidation; now, the number of categories for Commercial Printing and Related Support Activities is four.

## 2012 COMMERCIAL PRINTING AND RELATED SUPPORT ACTIVITIES NAICS SEGMENTS

### **1. Commercial print (except commercial screen and book printing) 323111**

*Commercial lithographic printing*

*Commercial gravure printing*

*Commercial flexographic printing*

*Quick printing*

*Digital printing*

*Manifold business forms printing*

*Blankbook, looseleaf binders, and devices manufacturing*

*Other commercial printing*

### **2. Commercial screen printing 323111**

### **3. Commercial book printing 323117**

### **4. Support activities for printing 323120**

*Tradebinding and related work*

*Prepress services*

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*The categories in italics above were segments prior to 2012 but are now aggregated in either 323111 or 323120*

In the final pages of this Executive Summary, we provide a quick overview of the Printing and Print-Related Media Industry in terms of employment, establishments, and shipments. In the following charts, we include data from both Print and Print-Related Media. The report is separated into two main sections: 1) Commercial Printing and Related Support Activities and 2) Print-Related Media (Publishing). In each section, data is provided by state and region.

## 2016 PRINT AND PUBLISHING MARKET OVERVIEW

### Commercial Print and Related Support Activities (NAICS 323)

NAICS segment	Employment	Establishments	Shipments (\$1,000s)
323111 Commercial print	338,592	18,405	\$61,863,993.76
323113 Commercial screen	63,056	5,150	\$11,520,933.72
323117 Commercial book	19,886	421	\$3,633,362.22
323120 Support activities	24,555	1,545	\$4,486,433.13
<b>Total</b>	<b>446,089</b>	<b>25,521</b>	<b>\$81,504,722.8</b>

### Print-Related Media (Publishing) (NAICS 511)

	Employment	Establishments	Shipments (\$1,000s)
511110 Newspaper	180,786	7,496	\$22,460,177.20
511120 Periodical	90,640	5,584	\$24,286,000.00
511130 Book	64,222	2,574	\$25,945,054.92
511140 Directory and mailing list	15,410	786	\$7,491,545.03
511191 Greeting card	13,076	99	\$4,576,600.00
<b>Total</b>	<b>364,134</b>	<b>16,539</b>	<b>\$84,759,377.1</b>

### Commercial Print and Related Support Activities and Print-Related Media (NAICS 323 + 511)

	Employment	Establishments	Shipments (\$1,000s)
<b>NAICS 323+511</b>	<b>810,223</b>	<b>42,060</b>	<b>\$166,264,100.0</b>

## All National Print and Publishing Markets

### 2016 PRINT AND PUBLISHING PERCENT CHANGE COMPARED TO 2015

#### Percent Change Commercial Print and Related Support Activities (NAICS 323)

NAICS segment	Employment	Establishments	Shipments
323111 Commercial print	0.0%	-1.5%	-1.8%
323113 Commercial screen	3.4%	3.9%	1.5%
323117 Commercial book	-8.2%	-5.8%	-9.9%
323120 Support activities	-7.1%	-3.3%	-8.8%
<b>Total</b>	<b>-0.4%</b>	<b>-0.7%</b>	<b>-2.2%</b>

#### Percent Change Print-Related Media (Publishing) (NAICS 511)

	Employment	Establishments	Shipments
511110 Newspaper	-7.2%	4.6%	-5.3%
511120 Periodical	-13.9%	-4.4%	6.3%
511130 Book	-0.7%	0.7%	14.8%
511140 Directory and mailing list	-30.1%	-11.3%	-2.9%
511191 Greeting card	1.6%	-1.0%	1.6%
<b>Total</b>	<b>-8.9%</b>	<b>0.0%</b>	<b>4.1%</b>

#### Percent Change Commercial Print and Print-Related Media (NAICS 323 + 511)

NAICS 323+511	Employment	Establishments	Shipments
	<b>-4.4%</b>	<b>-0.4%</b>	<b>0.95%</b>

## Regional Print and Publishing Market Overview

The regional definitions used in this report are consistent with U.S. Census Bureau definitions. The nine major U.S. regions, as defined by the U.S. Census Bureau, are:

**New England:** ME, NH, VT, MA, CT, RI

**Middle Atlantic:** NY, NJ, PA

**South Atlantic:** DC, DE, MD, WV, VA, NC, SC, GA, FL

**East South Central:** KY, TN, MS, AL

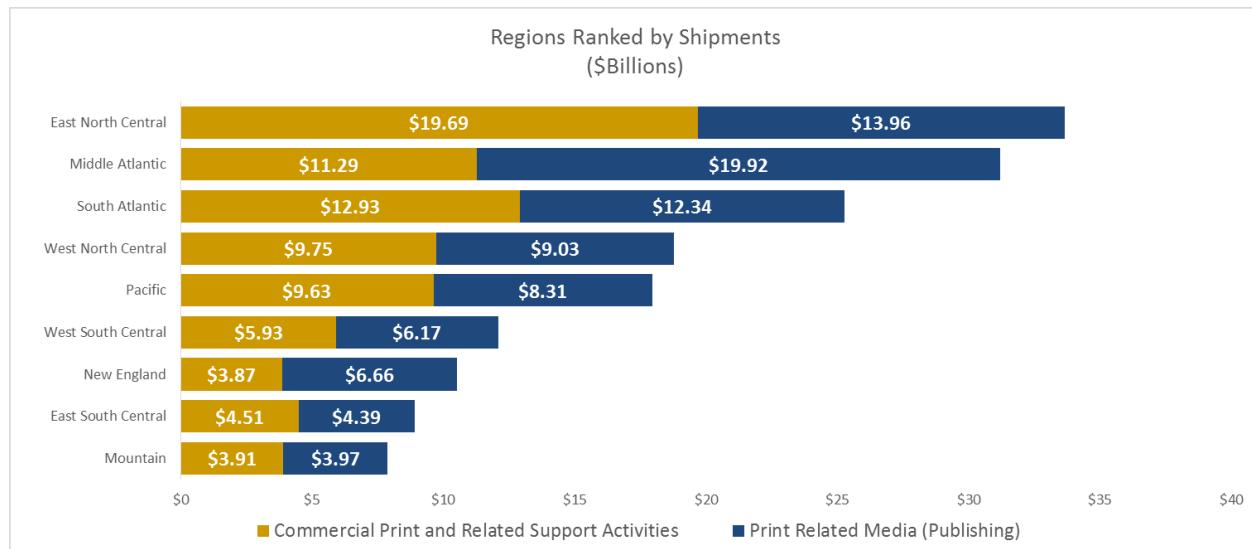
**West South Central:** OK, AR, TX, LA

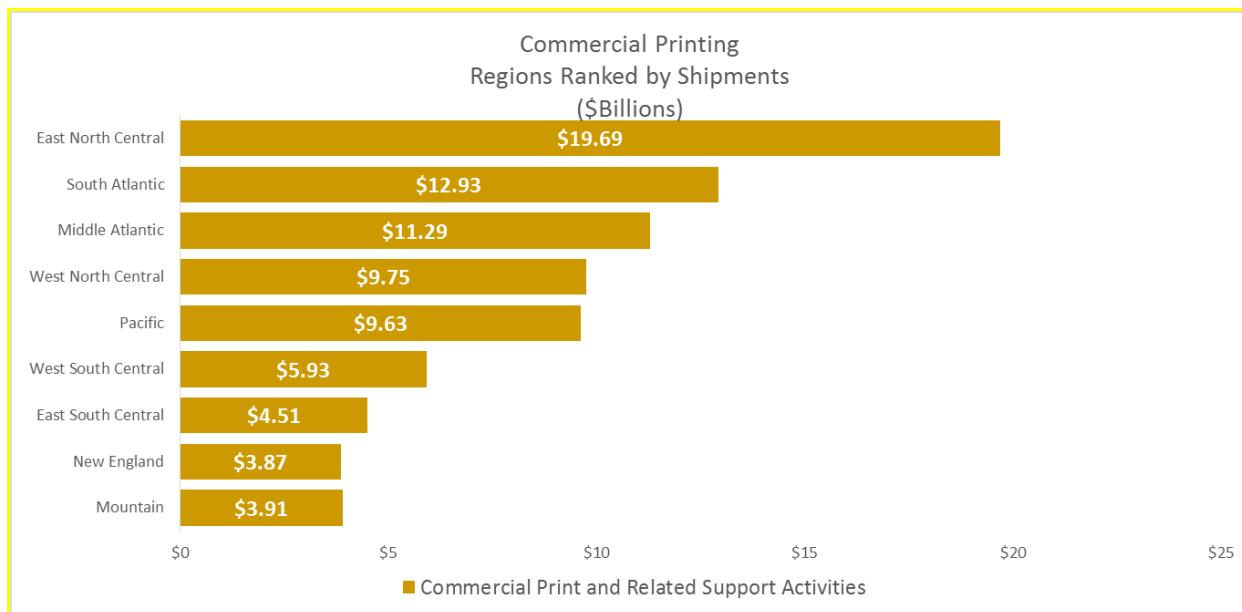
**East North Central:** WI, MI, IL, IN, OH

**West North Central:** ND, MN, SD, IA, NE, KS, MO

**Mountain:** ID, MT, WY, NV, CO, AZ, NM, UT

**Pacific:** AK, WA, OR, CA, HI





## 2016 U.S. COMMERCIAL PRINTING AND PRINT-RELATED MEDIA STATE RANKINGS

State	Employment		Establishments		Shipments (\$1,000s)	
		Rank		Rank		Rank
Alabama	7,735	30	555	27	\$1,426,720.39	31
Alaska	907	50	86	50	\$150,401.48	50
Arizona	9,774	26	699	21	\$1,974,632.89	26
Arkansas	9,675	27	355	33	\$2,366,085.47	22
California	67,512	2	4758	1	\$13,484,574.25	2
Colorado	10,708	24	876	17	\$2,190,924.68	23
Connecticut	11,108	23	557	26	\$2,168,363.87	24
Delaware	1,062	49	90	49	\$196,486.25	49
District of Columbia	6,464	34	154	46	\$1,504,627.32	29
Florida	35,731	7	2529	4	\$6,798,198.57	8
Georgia	19,325	17	1190	11	\$3,629,670.19	18
Hawaii	2,087	46	161	44	\$393,615.72	45
Idaho	3,218	40	210	40	\$686,937.96	39
Illinois	48,014	3	2021	5	\$10,006,672.60	3
Indiana	21,967	13	864	18	\$4,084,063.45	15
Iowa	13,569	20	623	24	\$2,809,204.52	20
Kansas	10,253	25	490	29	\$1,907,114.74	27
Kentucky	16,562	19	575	25	\$3,718,523.30	17
Louisiana	4,973	35	455	31	\$905,939.10	35
Maine	3,737	38	250	37	\$746,360.13	38
Maryland	12,999	21	638	23	\$2,773,196.48	21
Massachusetts	24,634	11	975	15	\$5,954,911.76	10
Michigan	23,485	12	1217	9	\$5,041,158.92	12
Minnesota	34,915	9	1085	13	\$7,652,559.11	6
Mississippi	2,937	41	287	36	\$460,650.40	41
Missouri	21,262	15	925	16	\$4,364,815.17	14
Montana	2,310	45	203	42	\$376,110.88	47
Nebraska	6,739	32	353	34	\$1,285,673.30	34
Nevada	4,180	36	304	35	\$764,438.92	37
New Hampshire	3,797	37	225	38	\$819,232.39	36
New Jersey	25,850	10	1271	8	\$5,350,077.57	11
New Mexico	2,338	44	223	39	\$449,216.55	43
New York	70,334	1	2961	2	\$17,255,755.16	1
North Carolina	20,050	16	1215	10	\$3,782,705.27	16
North Dakota	1,994	48	131	48	\$320,443.63	48
Ohio	36,961	6	1576	7	\$7,949,093.52	5
Oklahoma	7,321	31	487	30	\$1,325,331.71	32
Oregon	9,104	28	654	22	\$1,777,013.08	28
Pennsylvania	43,445	4	1603	6	\$8,603,387.35	4
Rhode Island	2,558	42	156	45	\$457,703.76	42
South Carolina	8,357	29	501	28	\$1,482,624.57	30
South Dakota	2,544	43	203	41	\$433,719.94	44
Tennessee	17,084	18	864	19	\$3,296,476.35	19
Texas	38,984	5	2740	3	\$7,498,685.52	7
Utah	6,628	33	381	32	\$1,295,422.07	33
Vermont	1,997	47	143	47	\$385,699.07	46
Virginia	21,883	14	1000	14	\$4,532,696.66	13
Washington	11,285	22	862	20	\$2,139,879.10	25
West Virginia	3,539	39	174	43	\$573,105.34	40
Wisconsin	35,429	8	1120	12	\$6,571,509.58	9
Wyoming	899	51	85	51	\$141,690.00	51
<b>Total U.S.</b>	<b>810,223</b>		<b>42,060</b>		<b>\$166,264,100.0</b>	