

A Summary:

Changing Structure of the Printing Industry

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PIA's Center for Print Economics and Management recently released our Changing Structure of the Printing Industry Report. The following is a brief summary.

First, a note on definitions. PIA's definition of the aggregate footprint of America's printing industry covers two major US Census categories:

- Commercial printing or NAICS North American Industrial Classification System) 323
- Print Related Media (Publishing) NAICS code 511.

In total these two sectors produce around \$166 billion in annual shipments and employ over 800,000 workers. Together they operate approximately 42,000 establishments. This report focuses only on the traditional commercial printing manufacturing segment.

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
Total	446,089	25,521	\$81,504,722.8

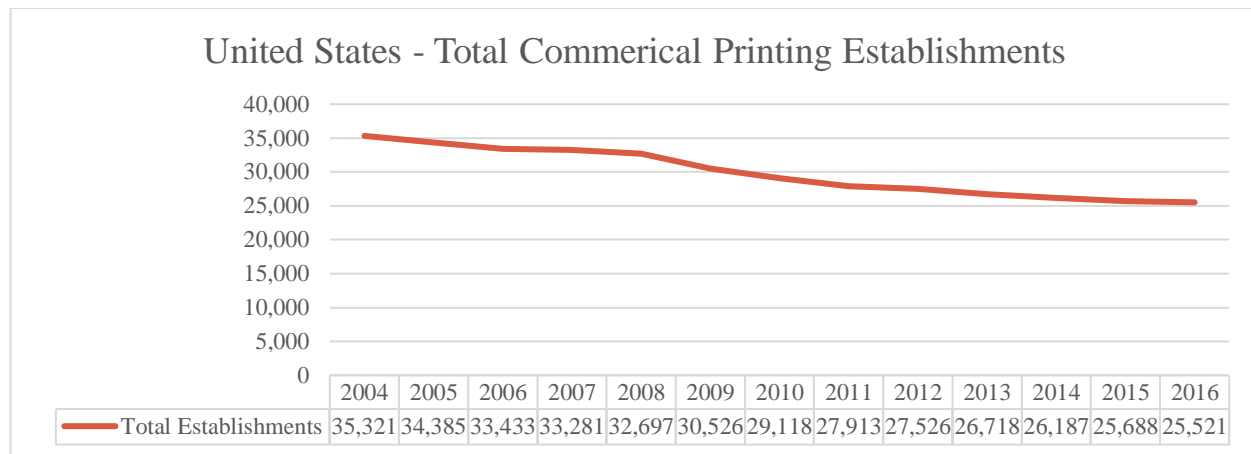
Print-Related Media (Publishing) (NAICS 511)

	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
Total	364,134	16,539	\$84,759,377.1

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

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

It is no secret that there have been declining printing establishments for several years. In fact, from 2004–2016, the industry lost 27.7% (9,800) of total United States commercial printing establishments. Over the same time period, commercial printing industry net employment decreased by 227,216 people—a total loss of 33.7% of employees.



However, all is not lost. Within recent years, specifically 2014–2016, we can start to see a stabilization trend in terms of establishments across various states. To put it into perspective, the decline in establishments from 2008–2010 was nearly 11% while in 2014–2016 it has only declined by 2.5%. In fact, almost half of the states (23) show in recent years a stabilizing or upward trend in both establishments and employees.

With only a 0.65% decline in commercial print establishments between 2015 and 2016 and other trends, we can start to see the printing industry total establishments approaching equilibrium.

In general, the printers that make it through the transition over the next few years may see an improved competitive environment.

For a state-by-state trend analysis, check out our Changing Structure of the Printing Industry Report. For more information, please email economics@printing.org.