



# Breaking Down the Print Industry

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# A Shifting Print Landscape

In the past, Print Providers fell into four main “buckets”:

- Commercial
- Wide-format/Signage
  - Packaging
- Promotional Production/Apparel

Today, those buckets are no longer clearly defined. Convergence has become the name of the game.

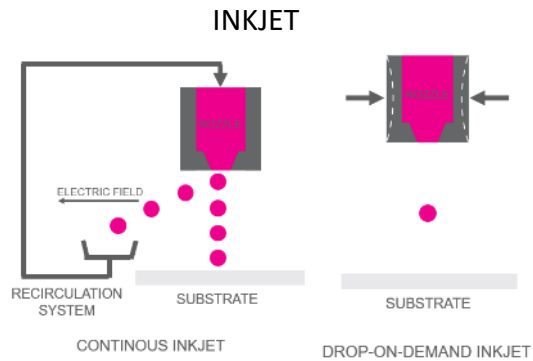
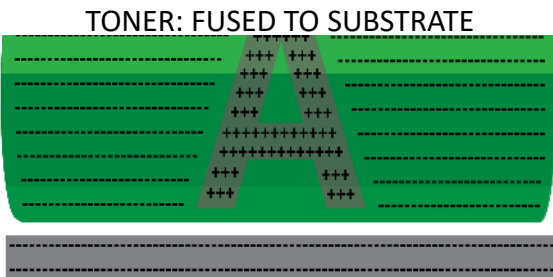
# A Mix of Classifications

Today's printers span a more diverse range, often more defined by who is buying from them, rather than what technologies they are operating. Commercial printers – the bucket where most, if not all, direct mail falls – have been forced to diversify the most out of all the traditional print classifications to stay profitable and relevant in today's marketplace.

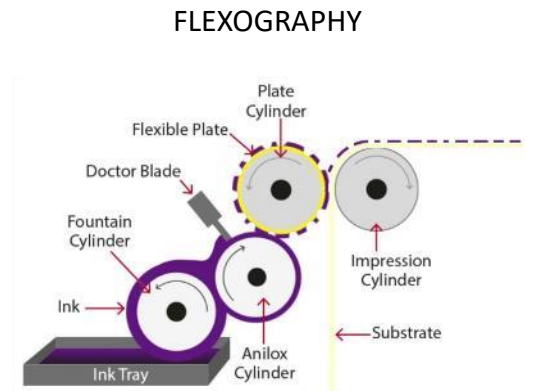
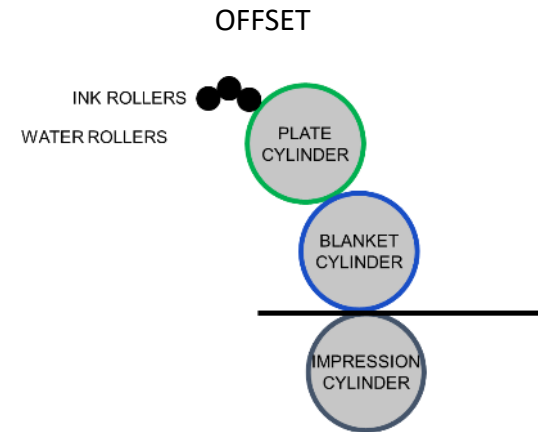
TYPE	CHARACTERISTICS
Commercial Printers	Offer a range of services. Prints almost anything including brochures, postcards, flyers, posters, and more. Typically, don't specialize in one narrow market niche.
Quick Printers/Copy Shops	Refers to business that offer fast printing and copy services, and usually have retail storefront for selling services.
Retail Stores	Office supply stores (including Staples, OfficeMax, the UPS Store) that offer customers print applications and graphics printing.
Sign and Display Graphic Printers	Establishments that primarily print signs, banners, posters, or point-of-purchase displays.
Online Providers	Sell print via an online storefront or customized web portal.
Print Distributor	Sell print work but do not produce it.
In-house Printing Operation/In-plant	Produce print for their parent organization, either in-house or outsourced. Range in size from 1 to 300+ employees.

# A Mix of Technologies

## DIGITAL PRINTING



## ANALOG PRINTING



# A Mix of Ink Types

While analog printing processes tend to use one type of ink – offset or flexographic – that is not the case at all when it comes to digital.

Technology	Applications	Strengths/Weaknesses
<b>Aqueous (water-based)</b>	Fine art, photography, posters (indoor)	<ul style="list-style-type: none"> <li>• Strong image quality</li> <li>• Low system cost</li> <li>• Limited to indoor use</li> </ul>
<b>Dye-sublimation</b>	Fabric, t-shirts, wall hangings	<ul style="list-style-type: none"> <li>• High quality</li> <li>• Very durable</li> <li>• Specialized focus</li> </ul>
<b>Latex</b>	Indoor & outdoor graphics, textiles	<ul style="list-style-type: none"> <li>• Low system cost</li> <li>• Application variety</li> </ul>
<b>Solvent</b>	Outdoor graphics	<ul style="list-style-type: none"> <li>• Low operating costs</li> <li>• Image durability</li> <li>• Environmental concerns</li> </ul>
<b>Eco-solvent</b>	Indoor & outdoor graphics	<ul style="list-style-type: none"> <li>• Low initial investment</li> <li>• Image durability</li> </ul>
<b>UV-curable</b>	Indoor & outdoor graphics	<ul style="list-style-type: none"> <li>• Image durability</li> <li>• Substrate flexibility</li> <li>• High system cost</li> </ul>

# All About the Applications

Because of all this, printers today are defining themselves less by the technologies they offer, and more by the applications they can produce.

## Print Product Market Outlook

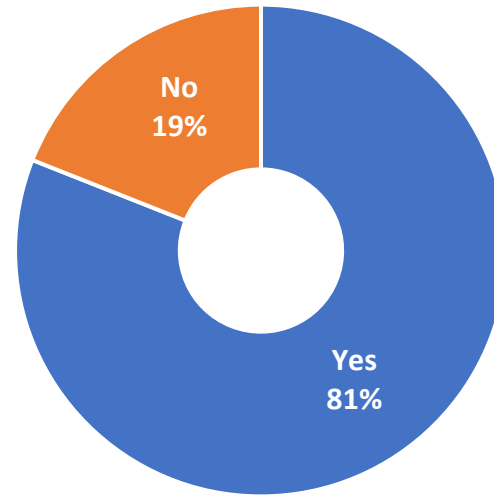
Market	Number Forecasting	Projected Average Annual 2023-2025
Direct Mail	171	3.2%-5.0%
Marketing Collateral	163	2.4%-4.3%
POP/Retail Displays	140	2.2%-3.5%
Tags/Labels	137	2.2%-3.2%
Books	154	0.9%-2.3%
Business Cards/Envelopes/Letterhead	159	0.5%-1.5%
Financial	137	0.5%-1.3%
Technical Documentation/ Manuals/Directories	126	0.0%-1.2%
Posters/Presentation Graphics	123	2.9%-4.5%
Window Graphics	125	3.5%-5.4%

Source: *State of the Industry Update, 3rd Quarter 2023*, PRINTING United Alliance

# Looking Beyond Print

**“Printers” are also looking at services that go beyond the printed product itself. Many today consider themselves “marketing communications providers” rather than printers.**

**Q. Does your organization use multi-channel or omni-channel campaigns that include print to communicate with customers and prospects?**



Source: NAPCO Research Annual Commercial Print Industry Trends and Strategies Service, 2023

# What Does This Mean for You?

So what does all this mean for a direct mail operation that just needs to get the work printed and out the door?

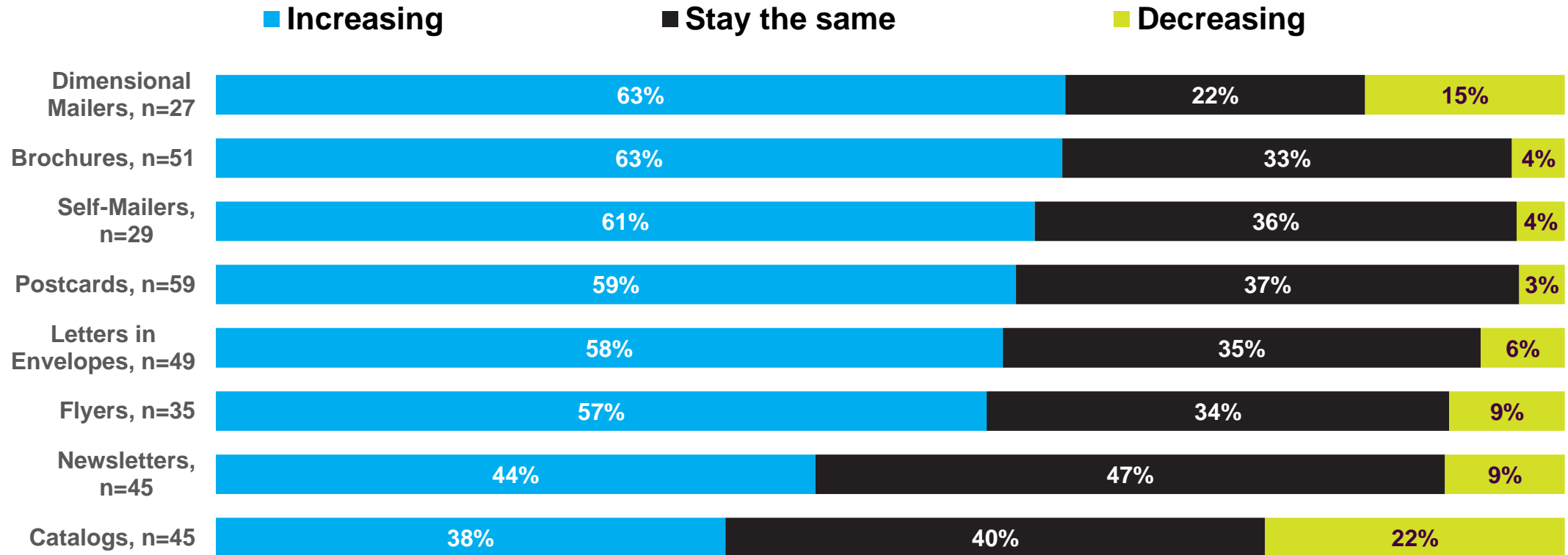




# Mail Works.

Despite the changing landscape, mail is still more effective than any other medium when it comes to capturing customer attention – and dollars. But what is most effective is certainly changing. And printers have a finger on the pulse of those changes.

Q. Of the direct mail print applications you print, what are you expecting in terms of demand in the next 2 years?



Source: NAPCO Research 2023

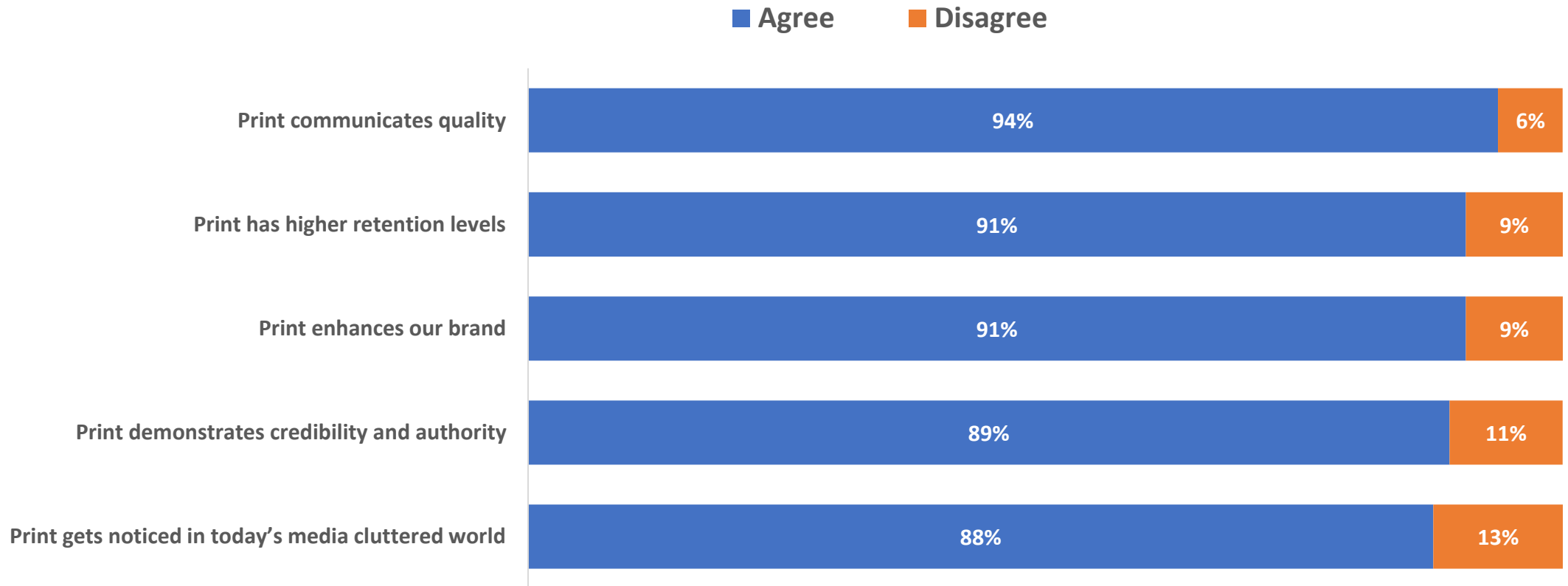


BIGGER. BETTER. TOGETHER.

# Mail Works.

And print buyers know it. Despite what you might hear in the news, print is very much not dead, with buyers and users alike recognizing the power it brings to the table.

**Q. Please indicate your level of agreement with the following statements relative to printed communications.**



Source: *Propelling Your Business Forward in an Everchanging Competitive Environment*, NAPCO Research/Canon U.S.A.

# Tip of the Proverbial Iceberg

And this is just a taste of the complicated print landscape of today. No one is “just a printer” anymore. They are marketing experts. Communication providers. And valuable partners when it comes to getting the most out of your campaigns.



Any questions?



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