

Additional References

- (Call the Bureau of the Census at (301) 763-4100 for information on ordering Census documents)
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- Employment and Earnings*, Bureau of Labor Statistics, U.S. Department of Labor, Washington, DC 20212. Telephone: (202) 606-6555.
- Producer Price Indexes*, Bureau of Labor Statistics, U.S. Department of Labor, Washington, DC 20212. Telephone: (202) 606-7716.
- American Bookseller*, American Booksellers Association, Inc., 560 White Plains Rd., Tarrytown, NY 10591. Telephone: (914) 631-7800.
- Book Industry Trends*, Book Industry Study Group, Inc., 160 Fifth Ave., New York, NY 10010. Telephone: (212) 929-1393.
- BP Report*, SIMBA Information, Inc., P.O. Box 7430, Wilton, CT 06897. Telephone: (203) 834-0033.
- Communications Industry Forecast*, Veronis, Suhler & Associates, Inc., 350 Park Ave., New York, NY 10022. Telephone: (212) 935-4990.
- CPDA News*, Council for Periodical Distributors Association, 60 East 42nd St., Suite 2134, New York, NY 10165. Telephone: (212) 818-0234.
- Industry Statistics*, Association of American Publishers, Inc., 220 East 23rd St., New York, NY 10010. Telephone: (212) 689-8920.
- Magazine & Bookseller*, North American Publishing Co., 322 Eighth Ave., 18th Floor, New York, NY 10001. Telephone: (212) 620-7330.
- Publishing Markets*, Cahners Publishing Co., 275 Washington St., Newton, MA 05158. Telephone: (617) 964-3030.
- Publishers Weekly*, Cahners Publishing Co., 249 West 17th St., New York, NY 10011. Telephone: (212) 463-0758.

COMMERCIAL PRINTING

After posting two years of sales declines, shipments of the U.S. commercial printing industry (SIC 275) rose to \$52.6 billion in 1993, an inflation-adjusted increase of 2 percent from 1992. The U.S. economic recovery that began in the final two quarters of 1993 lifted shipments of catalogs, newspaper inserts, and direct-mail materials, but failed to revive magazine advertising, which remained at depressed 1991-92 levels.

Printing industry employment totaled 555,000 in 1993, a marginal increase over 1992, and was still below the industry's

peak of 580,000 attained in 1990. The addition of 2,000 printing production workers came essentially in 1993's second half, a response to increased demand for printed products that stemmed from an improving economy. But the number of commercial printing establishments fell to an estimated 37,000, with mergers and plant closings most pronounced among the industry's smallest firms—those with fewer than 20 employees.

Commercial printers' profits improved in 1993 over 1992. Labor, material, and supply costs remained stable for most of the year, but paper prices edged lower, reflecting excess capacity at U.S. mills and continued weakness in paper demand. Improvements in productivity, the result of more efficient work-flow systems and equipment utilization, also led to 1993's increased profit margins.

Industry's Transition Brings Challenges

The past decade has brought a series of challenges to the commercial printing industry, including environmental concerns, new developments in printing technology, and growth in demand for non-print media. These challenges have focused the industry's attention on material and supply requirements, workforce training needs, and capital expenditure levels.

ENVIRONMENTAL PROFILE

Since the manufacture and sale of printed products involves the use of air, water, and land, commercial printers are extremely conscious of their relationship with the environment. Meeting increased environmental requirements has contributed to the higher costs printers pay for materials and supplies: to 45 percent of total costs in 1992 compared with 40 percent in 1972. Paper made without chlorine or acid and which contains moderate quantities of recyclable materials costs appreciably more than ordinary printing paper. Nontoxic printing inks and printing press fountain solutions, with volatile organic compound levels either reduced or removed, also raise costs.

Advances in printing technology have changed the industry's workforce. The continued automation of the printing process, through application of computer-related electronics to presses and other machinery and equipment, reduces the need for craft-oriented employees, but raises demand for workers with electronic skills. Training programs in the past were largely craft-oriented, union-run activities, but today fewer than one

Trends and Forecasts: Commercial Printing (SIC 275)

(in millions of dollars except as noted)

Item	1987	1988	1989	1990	1991	1992 ¹	1993 ²	1994 ³	Percent Change (1989-1994)					
									88-89	89-90	90-91	91-92	92-93	93-94
Industry Data														
Value of shipments ⁴	44,786	47,460	50,312	52,904	51,948	51,115	52,595	55,800	6.0	5.2	-1.8	-1.6	2.9	6.1
Value of shipments (1987\$)	44,786	46,065	46,653	47,782	46,129	45,437	46,376	47,651	1.3	2.4	-3.5	-1.5	2.1	2.7
Total employment (000)	554	557	569	580	556	553	555	565	2.2	1.9	-4.1	-0.5	0.4	1.8
Production workers (000)	401	402	414	421	401	398	400	409	3.0	1.7	-4.8	-0.7	0.5	2.3
Average hourly earnings (\$)	9.93	10.01	10.34	10.47	10.75	10.91	11.10	—	3.3	1.3	2.7	1.5	1.7	—
Capital expenditures	2,013	1,898	2,135	2,220	2,051	—	—	—	12.5	4.0	-7.6	—	—	—
Product Data														
Value of shipments ⁵	43,995	46,597	49,621	52,572	51,761	50,985	52,465	55,665	6.5	5.9	-1.5	-1.5	2.9	6.1
Value of shipments (1987\$)	43,995	45,215	45,997	47,466	45,949	45,260	46,165	47,435	1.7	3.2	-3.2	-1.5	2.0	2.8
Trade Data														
Value of imports	—	—	371	393	420	442	465	500	—	5.9	6.9	5.2	5.2	7.5
Value of exports	—	—	811	772	1,026	1,056	1,160	1,275	—	-4.8	32.9	2.9	9.8	9.9

¹ Estimate, except exports and imports.

² Estimate.

³ Forecast.

⁴ Value of all products and services sold by establishments in the commercial printing industry.

⁵ Value of products classified in the commercial printing industry produced by all industries.

SOURCE: U.S. Department of Commerce: Bureau of the Census, International Trade Administration (ITA). Estimates and forecasts by ITA.