UK Printing Market Update 2015

Description:
This market update examines the UK printing industry. Printing is a broad market which involves the business-to-business (B2B) service of printing companies being subcontracted to manufacture printed products for either customer-facing or business needs.

There are many printing companies in the various sectors and these manufacture the printed products through the many different printing methods.

The company or brand then retails the product, either directly (such as in the greetings card or magazine sectors) or indirectly, through the use of printed packaging or labels used on the actual end product. Only rarely does the company or brand print their own goods rather than outsourcing the printing to specialist printers.

This report covers physical printing and excludes the publishing of goods into an online realm.

Market Sectors

This is a large and diverse market and one which is subdivided into several market sectors.

Owing to the different printing methods used and the breakdown of categories, there is some overlap between these sectors and this can in turn result in the same product being included in more than one sector. As some printing sectors have risen or declined in value, some smaller categories have become redefined under 'other printing'; others have become redefined or categorised in their own sector.

Advertising Literature:

Advertising literature encompasses materials used to market and advertise goods including commercial catalogues, advertising material such as point-of-sale (PoS), loose-leaf inserts and direct mail.

Commercial catalogues are printed paper catalogues from which home shopping consumers can make purchases. They are usually published bi-annually to fit with the main shopping and fashion seasons of spring/summer and autumn/winter. They are often sent to existing or potential consumers via mail, and can also include smaller editions sent throughout the year for sales or mid-season offers.

Direct mail includes promotional mailshots, sometimes along with free product samples, delivered by post to existing and prospective consumers to advertise a company or product and also (hopefully) generate a direct consumer purchase. Direct mail is often employed by businesses in the finance and automobile industries to target specific individuals found through database lists. Loose-leaf inserts are flyers and advertisements on printed card or paper distributed inside other print publications such as magazines or newspapers.

Books, Brochures, Leaflets, etc.:

This category of printed matter includes books, brochures, pamphlets and leaflets, children’s books, printed and manuscript music, dictionaries and encyclopedias, annual business reports and accounts. Books encompass both consumer and non-consumer books, such as both fiction and academic/professional physical print books.

Letterheads, Business Cards, Programmes, Tickets, etc.:

Letterheads are usually used by businesses as headed paper with company branding on for use in formal business print documents or in documentation sent to consumers. Business cards usually relate to business details printed onto card. Tickets include those for leisure events such as sports events, concerts, theatre and music festivals, as well as travel tickets, parking tickets and lottery tickets. Programmes are often printed for leisure events of various types and are possibly kept as souvenir memorabilia. Vouchers are included in this sector and cover discount vouchers and gift cards which are often printed on paper. Due to the varied nature of the tickets sub-sector, various printing companies serve the market.
Cartons:

This is a form of printed packaging, covering printing onto folding cartons, boxes and cases usually manufactured from card. Cartons are often used by food and drink manufacturers as packaging for products, and by the beauty, healthcare and pharmaceutical industries as packaging for medicines and beauty products.

Printing onto Non-Paper/Board:

Printing onto non-paper/board covers the likes of printing onto plastics, metal film and similar. It includes the printing of non-paper packaging goods and printing onto plastic gift and bank cards. The new innovation of three-dimensional (3D) printing usually involves plastic materials.

Printed Labels:

Printed labels involve company or product information being printed onto paper, plastic, fabric, film or metal labels, which is then attached onto products or product packaging. It includes the printing of company branding, as well as legally required information, such as health and safety guidelines or medical advice. Printed labels are used on the majority of retail consumer product packaging and manufacturing product packaging. They are also used on products which advertise a sale or discounted price to consumers in retail stores. Fabric labels can be sewn into garments, while paper labels often have adhesive on them which can be attached onto products. Labels can also be glue-based, heat sensitive or shrink sleeved.

Magazines and Journals:

This sector covers all types of magazine and journal categories, including business and professional magazines, consumer magazines, customer magazines and academic journals. These can be free publications distributed by educational or community institutions or societies, or paid-for publications. Typically, the quality of the paper and printing is dependent on the price of the publication.

Security Printing:

Security printing consists of stamps, cheques, bank notes, postal orders, credit or debit cards, social security payment books and entry cards used for security devices.

Newspapers:

The newspapers sector includes both national and regional paid-for and free newspaper publications, which are mostly distributed in retail outlets or through consumers' doors. They include those distributed more than four times a week, such as daily newspapers, and also those published less than four times a week, such as local community newspapers. They are often printed by large national newspaper corporations and their subsidiary printing services.

Bookbinding:

Bookbinding involves the binding and finishing methods of printing. Subcategories include trade binding and the finishing of books, brochures, magazines and catalogues, etc.

Graphic Services:

Graphic services include graphic design commonly used for logos and company branding, as well as printing on the likes of posters, billboards, signs and product packaging.

Composition and Platemaking:

The printing operations used in this category include pre-press and pre-media such as composition, platemaking, typesetting and printing components. Composition is mainly used in letterpress printing and involves the use of a cylindrical composition roller to apply ink to a surface. Platemaking involves making plates that are used in the printing process and typesetting, including phototypesetting, where textual matter is set in type. Printing components comprise of printing type and printing blocks, plates, wood blocks and so on.
Business Forms:

The business forms sector covers business documentation of many types, such as invoices, receipts, mailing sheets and company stationery. It also includes various types of administration forms such as those used in health and safety, customer complaint forms and holiday booking forms. Some companies print these forms themselves through computer printers, while others are tailor-made by specialist out-sourced printers. In such circumstances, printing companies may produce tailored forms for a client's specific needs or a bulk generic form that is distributed to a range of business clients. These can include single-sheet listing paper forms and multi-part listing paper forms.

Postcards and Greetings Cards:

Postcards and greetings cards involve printing onto cards which are distributed on special occasions, including Christmas cards, birthday cards, wedding/anniversary cards, condolence cards and other special event cards. Innovations in the market have also allowed consumers the option to personalise their own designs. This area of the market therefore offers both B2B and business-to-consumer (B2C) services.

Other Printing:

The grouping of 'other printing' includes a variety of printing channels and end-print product types which have a lower value than the other leading sectors noted above. This sector includes:

- Binders, folders and file covers
- Registers, account books and receipt books
- Notebooks, letterpads, etc.
- Diaries
- Engagement books, address books, etc.
- Exercise books
- Albums (for samples or collections)
- Blotting pads and book covers
- Maps, charts and globes
- Printing of transfers (decalcomanias)
- Calendars
- Pictures, designs and photographs
- Other printing not included in the above categories.

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