



# **North American Monthly Printing Shipments 2006 to 2010**

**with forecasts through 2016**

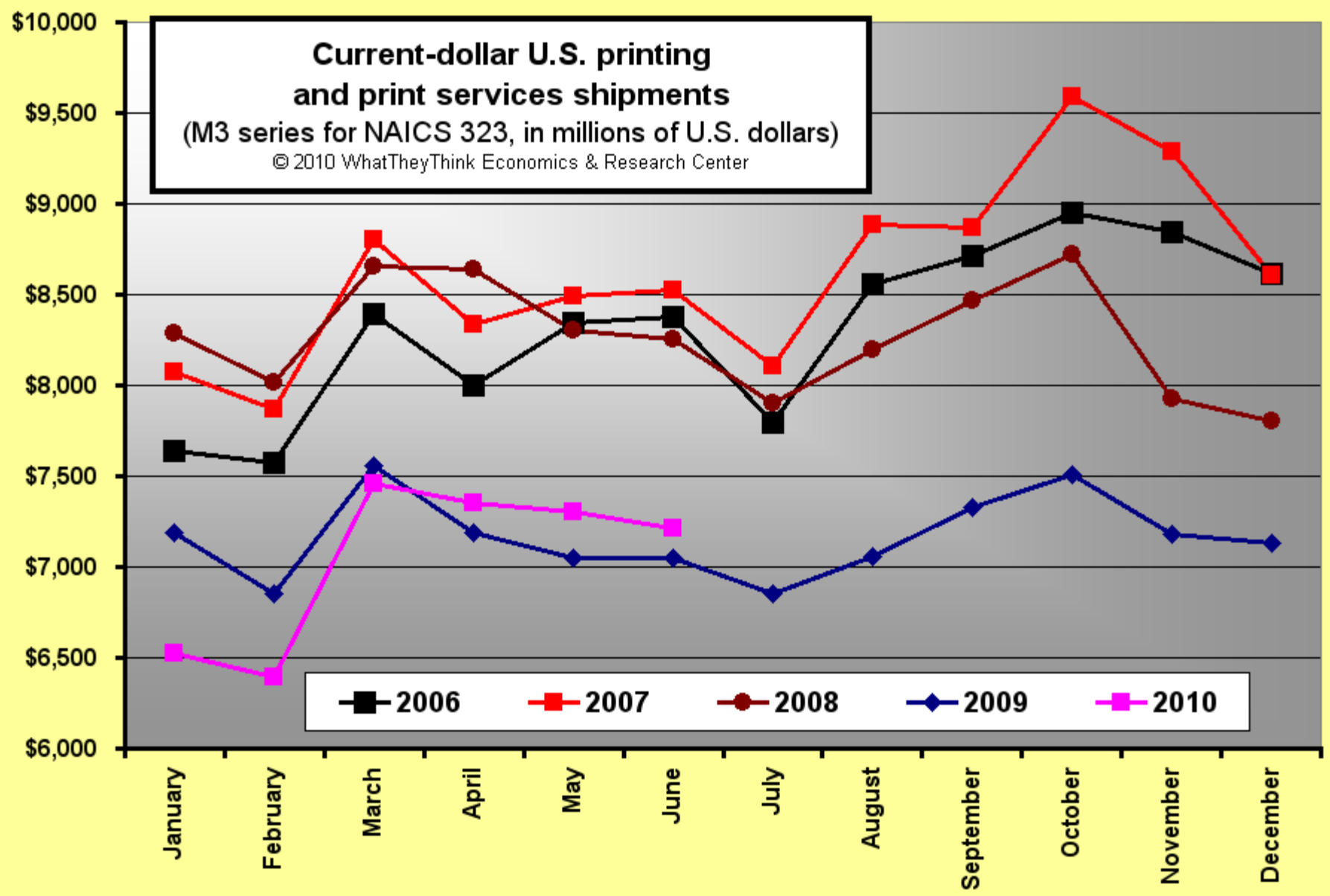
**Issue # 57, August 2010  
USA data: up to June 2010  
Canada data: up to May 2010**

# How to Use This Document

- This is a Powerpoint file which can be used in your internal company and client presentations
- The slides have been designed for easy “copy and paste” into your Powerpoint presentations
- The information in these slides are to be treated just as one would use “company confidential” information and are © 2010 WhatTheyThink

# Executive Summary

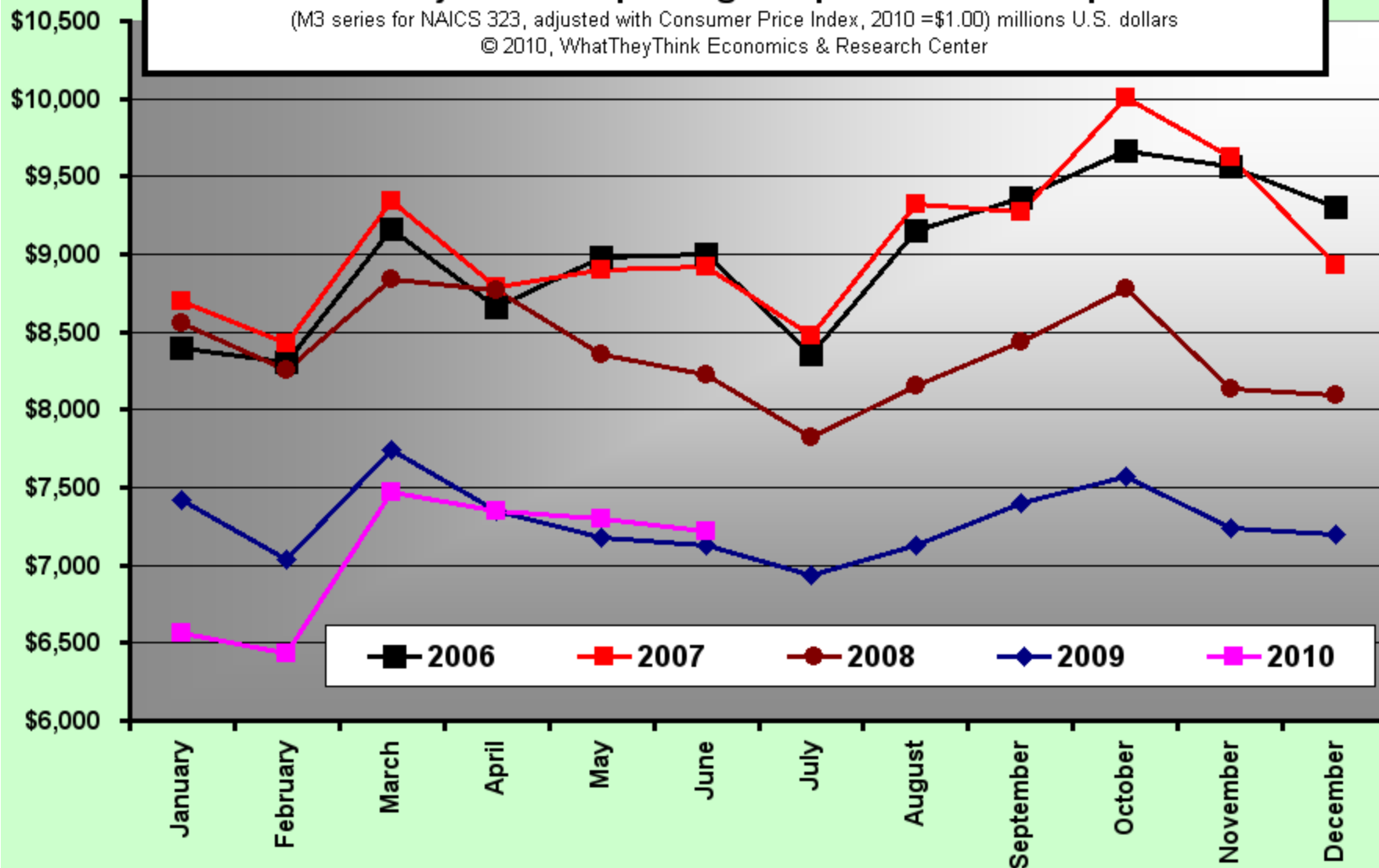
- 3 consecutive months of current & real increase
  - Has not happened since 2007
    - Jun04-Nov07 current \$, Oct06-Apr07 real \$
- Jun10 current \$ shipments \$7.2 billion (+3.6%) +\$166MM vs. Jun09; +\$92MM real \$ (+1.3%)
- First half of 2010: -\$624MM (-1.5%) current \$, -\$1.5B (-3.5%) inflation-adjusted \$
- Q2-10 current +\$580MM +2.8%, real +\$212MM +1%
- May Canada shipments were C\$694 million
  - Down -11.1% in current C\$ and down -13.0% inflation-adjusted
  - On US\$ basis, down -4.2% in current, -6.2% inflation-adjusted
- 2010 WTT ERC US comm'l printing forecast revised up \$85B for USA (+\$3B), C\$8.7B for Canada is same



## Inflation-adjusted U.S. printing and print services shipments

(M3 series for NAICS 323, adjusted with Consumer Price Index, 2010 = \$1.00) millions U.S. dollars

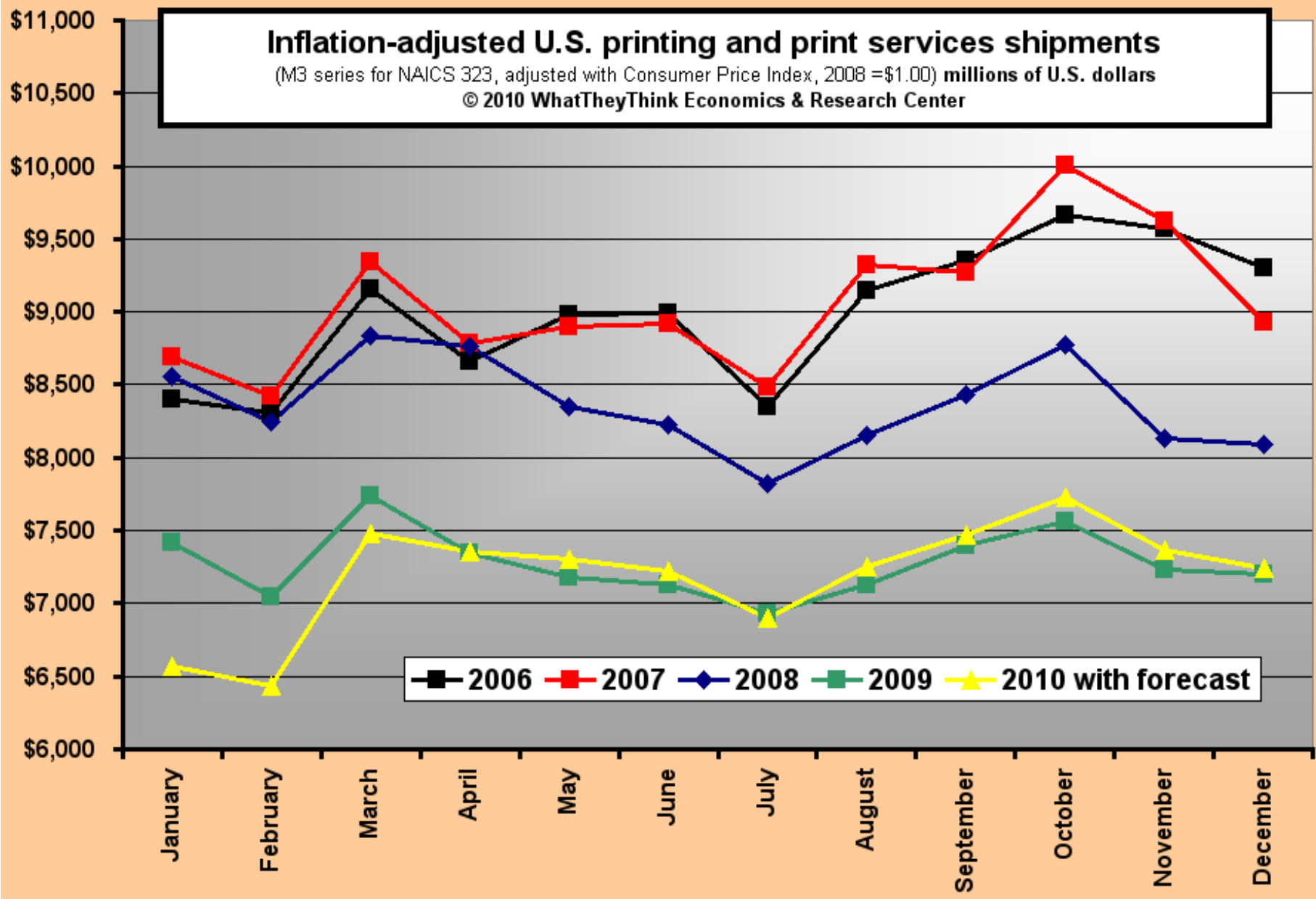
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## Inflation-adjusted U.S. printing and print services shipments

(M3 series for NAICS 323, adjusted with Consumer Price Index, 2008=\$1.00) millions of U.S. dollars

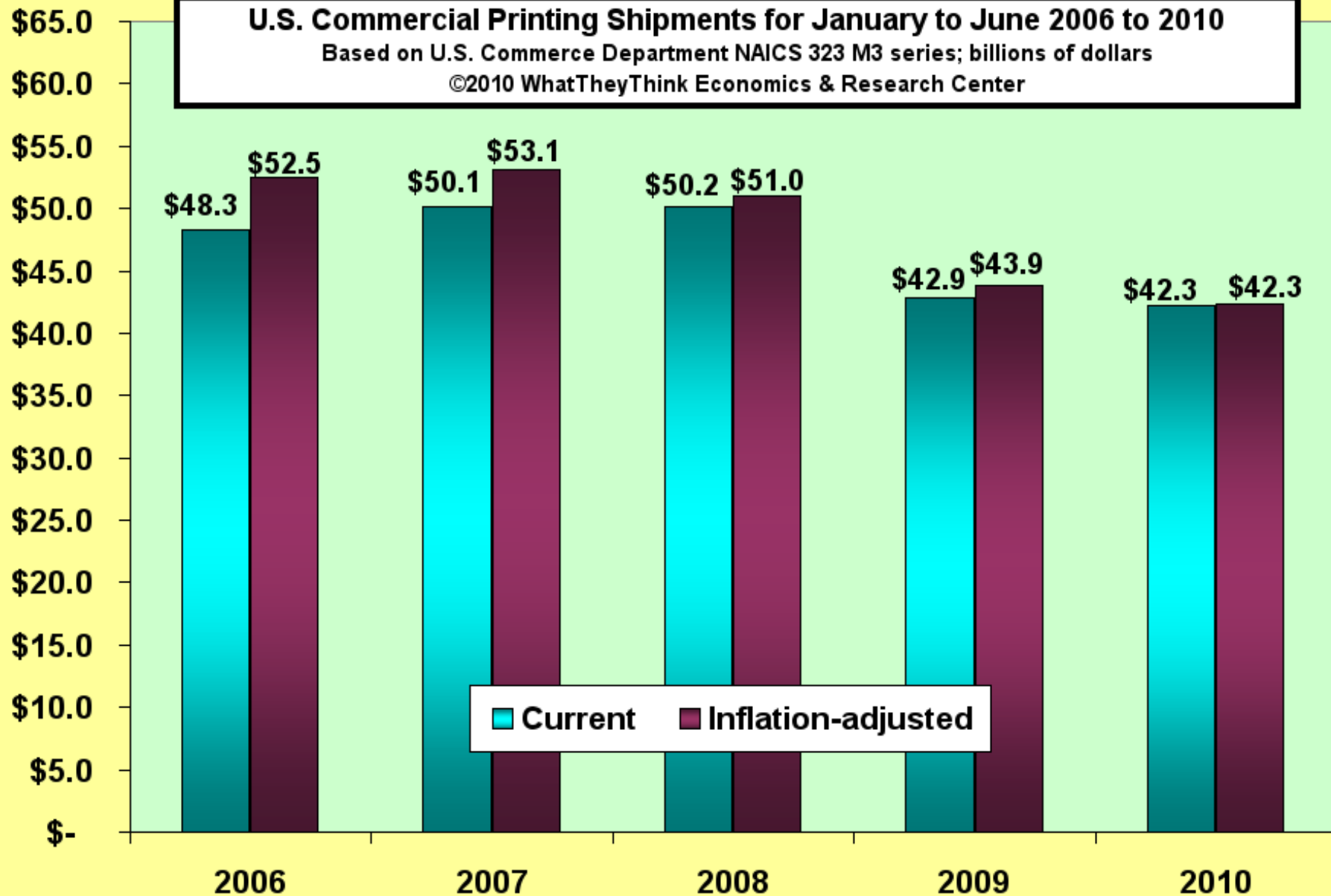
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## U.S. Commercial Printing Shipments for January to June 2006 to 2010

Based on U.S. Commerce Department NAICS 323 M3 series; billions of dollars

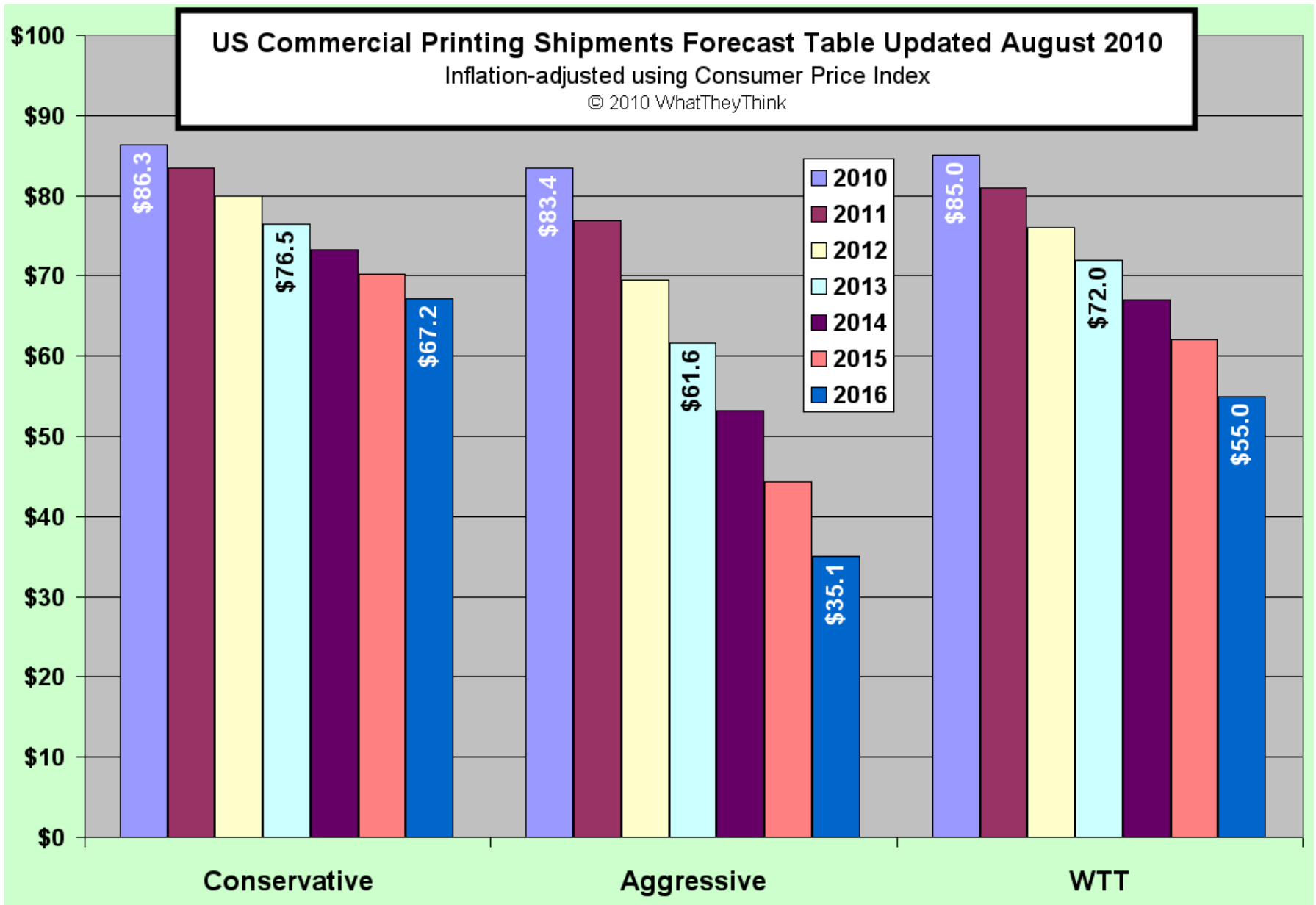
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# Updated U.S. Forecasts (as of 8/2010, in 2010\$)

	FORECASTS BY STATISTICAL MODELS			WTT ERC Qualitative Forecast
	Conservative	Aggressive	GDP (+2.5%)	
<b>2010</b>	\$86.3	\$83.4	\$101.6	<b>\$85.0</b>
<b>2011</b>	\$83.4	\$76.9	\$99.1	<b>\$81.0</b>
<b>2012</b>	\$79.9	\$69.5	\$96.5	<b>\$76.0</b>
<b>2013</b>	\$76.5	\$61.6	\$93.9	<b>\$72.0</b>
<b>2014</b>	\$73.3	\$53.2	\$91.2	<b>\$67.0</b>
<b>2015</b>	\$70.2	\$44.4	\$88.4	<b>\$62.0</b>
<b>2016</b>	\$67.2	\$35.1	\$85.6	<b>\$55.0</b>





# Final Historical Survey Results

## Business Conditions 6+% 1H'10 vs '09

	1-4	5-9	10-19	20-49	50-99	100-249	250+	Total*
<b>Mar-08</b>	9%	34%	31%	24%	18%	14%	24%	22%
<b>Jun-08</b>	28%	19%	33%	27%	24%	16%	27%	25%
<b>Sep-08</b>	19%	21%	32%	18%	19%	29%	23%	23%
<b>Dec-08</b>	14%	22%	24%	19%	24%	18%	23%	21%
<b>Mar-09</b>	17%	6%	14%	9%	5%	4%	5%	8%
<b>Jun-09</b>	8%	16%	11%	10%	6%	2%	4%	9%
<b>Sep-09</b>	14%	17%	13%	6%	3%	8%	0%	9%
<b>Dec-09</b>	7%	13%	11%	10%	2%	6%	0%	8%
<b>Apr-10</b>	16%	32%	21%	22%	17%	26%	29%	23%
<b>Jun-10 FINAL</b>	36%	23%	24%	22%	33%	29%	29%	30%

*\*Demographics-weighted total*

# Final June 2010 Survey Results

## Business Conditions 6+% 1H'10 vs '09

	1-9	10-19	20-49	50-99	100+	Total*
increased more than 10%	22%	9%	11%	25%	23%	19%
increased between 6% and 10%	10%	15%	11%	8%	6%	11%
increased between 1% and 5%	16%	15%	17%	21%	12%	16%
stayed about the same	21%	21%	22%	21%	26%	21%
decreased between 1% and 5%	17%	9%	9%	8%	7%	14%
decreased between 6% and 10%	4%	18%	20%	4%	11%	7%
decreased more than 10%	10%	12%	11%	13%	16%	11%
<b>INCREASE 6+%</b> <b>LESS DECREASE 6+%</b>	<b>18%</b>	<b>-6%</b>	<b>-9%</b>	<b>17%</b>	<b>2%</b>	<b>12%</b>
<b>INCREASE 10+%</b> <b>LESS DECREASE 10+%</b>	<b>12%</b>	<b>-3%</b>	<b>0%</b>	<b>13%</b>	<b>7%</b>	<b>9%</b>

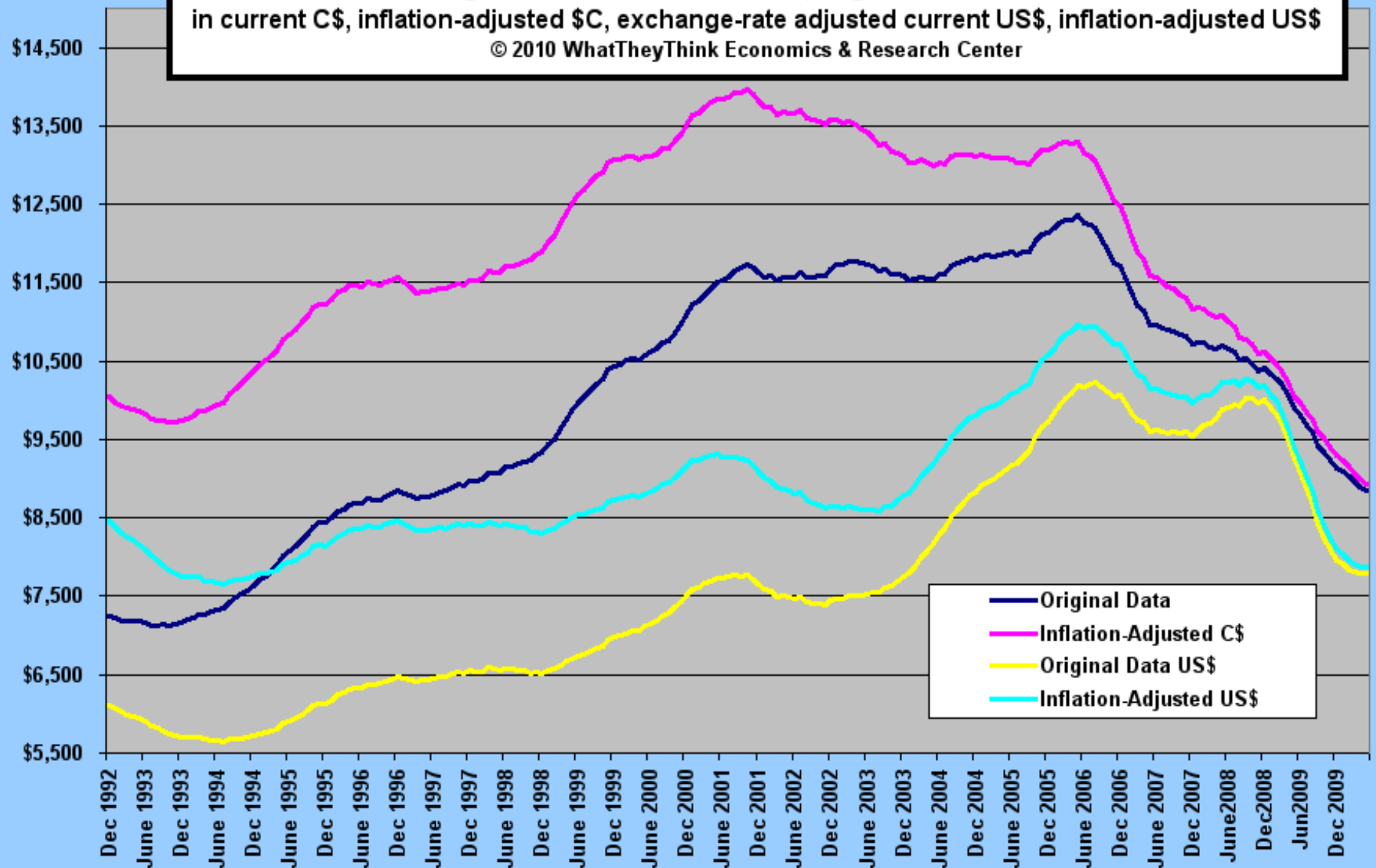
*\*Demographics-weighted total*



## Canada Commercial Printing Shipments (NAICS 323) 1992 - May '10

12-month Moving Totals in millions of dollars; original data from Statistics Canada  
in current C\$, inflation-adjusted \$C\$, exchange-rate adjusted current US\$, inflation-adjusted US\$

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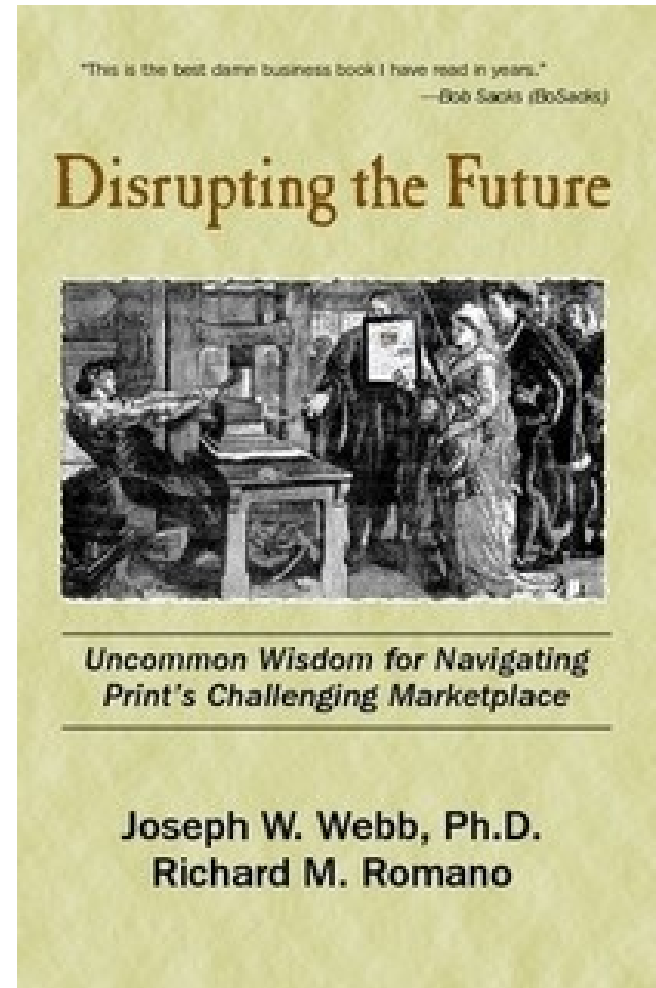
# Canada Forecast as of 8/10

Forecast in Billions of Inflation-Adjusted \$C			
Forecast Model	Conservative	Aggressive	Mean
2010	\$8.4	\$9.0	\$8.7
2011	\$8.0	\$7.9	\$8.0
2012	\$7.7	\$6.8	\$7.2
2013	\$7.4	\$5.5	\$6.5
2014	\$7.1	\$4.1	\$5.6
2015	\$6.9	\$2.6	\$4.7
2016	\$6.6	\$1.0	\$3.8



<http://tinyurl.com/disruptingresources>

- Download the PDF with live hyperlinks
- Download “Renewing the Printing Industry”
- Download PDFs and Powerpoint files used in “Disrupting”



# Notes about this data series

- Original data series is published by the U.S. Commerce Department and can be found at <http://www.census.gov/indicator/www/m3/>
- CPI adjustment is based on data supplied by the U.S. Bureau of Labor Statistics [www.bls.gov](http://www.bls.gov) .
- Data series are for “Printing” and include all segments in NAICS 323; the data series includes commercial printing and trade services such as prepress and postpress.
- The data series does not include inplant printing, printing of newspapers in captive plants owned by newspapers, or packaging.
- New data are published every month on a preliminary basis; prior month shipments are updated by the Commerce Department.
- Canada data are from [Statistics Canada](#) and have the same definition as USA data
- The WhatTheyThink [Economics and Research Center](#) publishes updates to this data series monthly.

# About the WhatTheyThink Economics & Research Center

- The Economics & Research Center (ERC) is an expanded service of WhatTheyThink and features access to a wide range of industry data through text, audio, and video.
- The Center also produces a quarterly economic webinar where we review general economic, industry trends, and key issues that affect the demand for print and printing technologies
- Be sure to visit our [web site](#) for more information.