

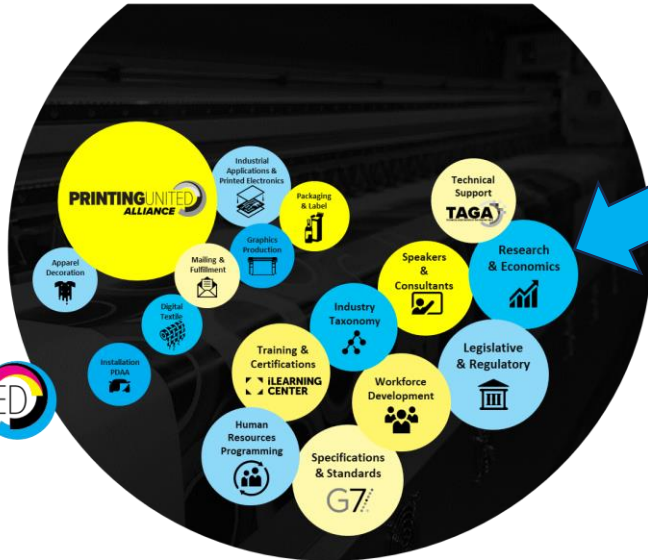


Advertising
Specialty
Institute®

Printing Industry 101: All About Print Products & Your Sales Opportunities

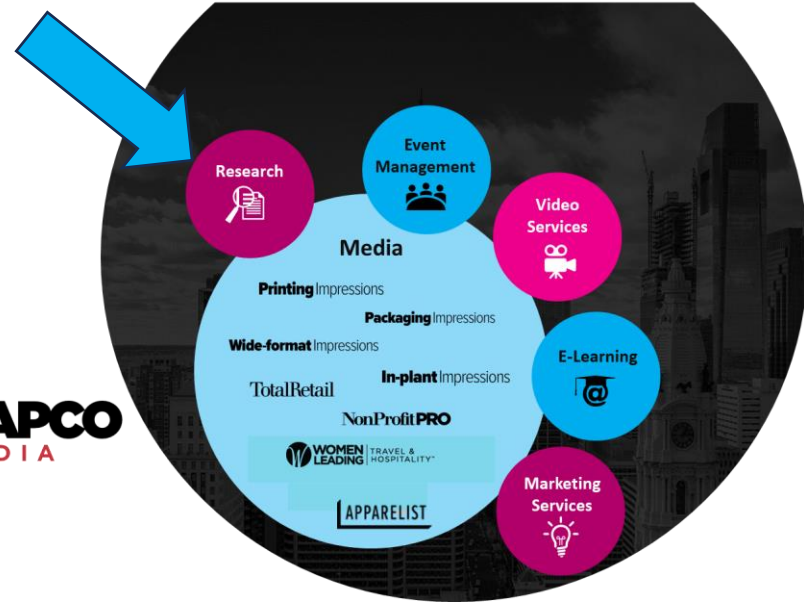
Lisa Cross, Principal Analyst
NAPCO Research/PRINTING United Alliance

ABOUT US



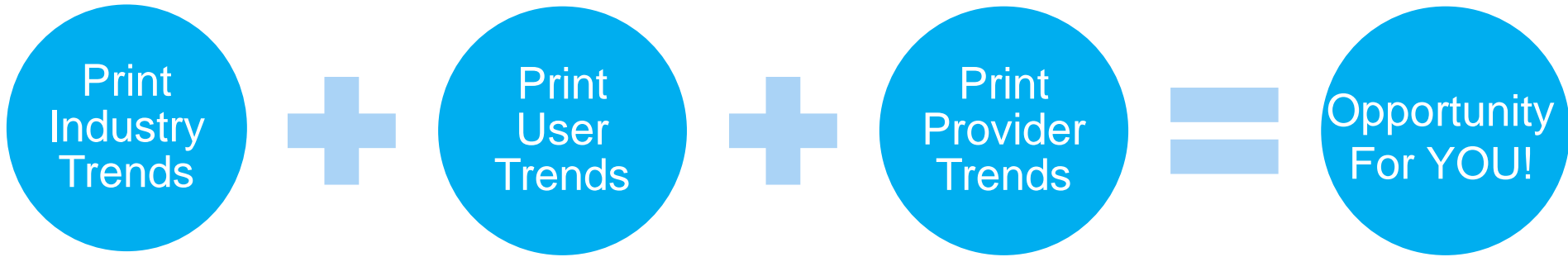
PRINTING UNITED ALLIANCE
Members: 4,300+ growing

NAPCO MEDIA

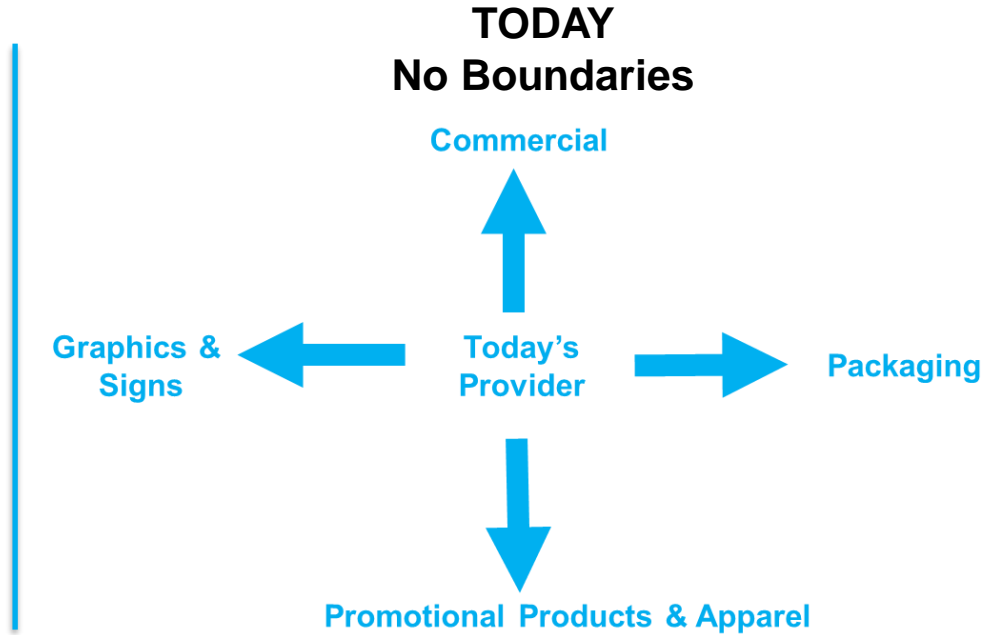
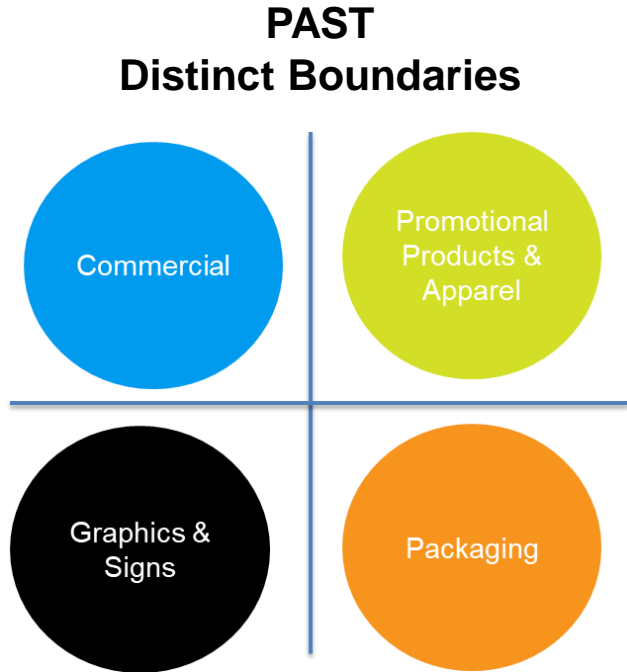


NAPCO RESEARCH

■ TODAY'S CONVERSATION...



CONVERGENCE IS RESHAPING ALL MARKETS



YOUR PEERS ARE ADDING PRINT...

The screenshot shows the hds website interface. At the top, there is a navigation bar with the hds logo, a phone number (800.220.1497), and buttons for 'TALK TO US' and 'PRODUCT SEARCH'. Below the navigation bar, there are links for 'brand solutions', 'about us', 'success stories', 'newsroom', 'contact us', and 'make a payment'. The main content area features a woman in a yellow sweater presenting to two men. A large screen behind her displays a list of product categories and a grid of promotional items. The categories listed are: APPAREL (TEE SHIRTS, OUTER WEAR, HEADWARE), PROMOTIONAL (DRINKWARE, HOME & OFFICE, GIFT IDEAS), and ALL THINGS PRINT. The grid shows various items like pens, a keychain, a cap, a mug, a t-shirt, a water bottle, and a sign. To the right of the screen, there is a text block that reads: 'our team will help you show off your brand' followed by a list of services: 'corporate apparel + uniforms', 'promotional merchandise', 'incentives + awards', and 'printing, packaging + signage'. The last item is circled in red. Below this, there is a teal box with the text 'we go to great lengths to make you look good.' and a 'see more' button.

hds

800.220.1497 TALK TO US » PRODUCT SEARCH »

brand solutions ▾ about us success stories newsroom contact us make a payment

our team will help you
show off your brand

- corporate apparel + uniforms
- promotional merchandise
- incentives + awards
- printing, packaging + signage

we go to great lengths to make you look good.

see more

■ ... AND EXPANDING PRINT CAPABILITIES

BAMKO CULTURE

BAMKO's Commercial Print Expansion: Meet Michael O'Neal

👤 Laura Hiserodt 📅 June 6, 2024 ⌚ 5:08 pm

Big news! [BAMKO](#) is expanding our commercial print capabilities, and we've got a dynamic expert joining the team to help us make it happen.

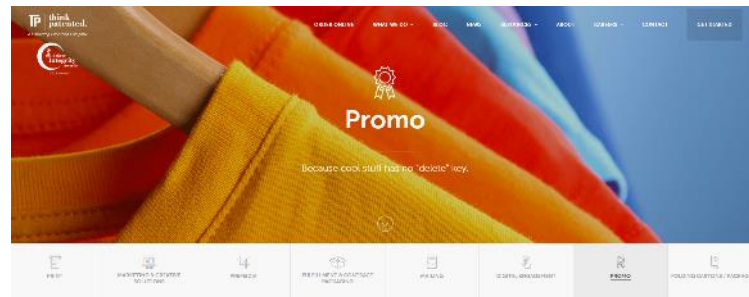
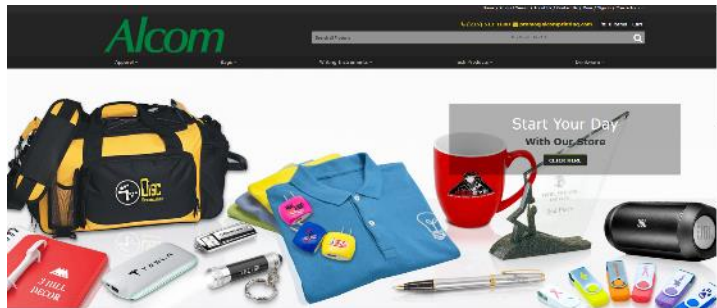
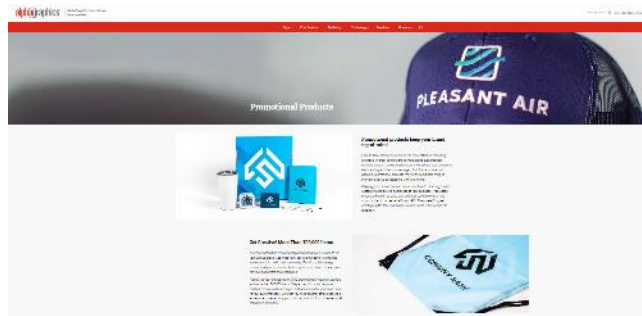
Meet [Michael O'Neal](#), our new Vice President of Enterprise Accounts. With over thirteen years of experience, O'Neal has held senior leadership roles with leading companies in the industry. Now, he is ready to take his role as a subject matter expert to new heights, spearheading BAMKO's expansion into the commercial print vertical.

We sat down with O'Neal to get to know more about him and his goals for this new role:



BAMKO is #8 on
ASI's Counselor
Top 40
Distributor list

PRINTERS ARE OFFERING PROMOTIONAL PRODUCTS



FRANCHISES AND AFFILIATES ALSO OFFER PRINT

OPPORTUNITIES

PROforma

Printing Services

Your printed projects speak volumes about your business and brand. As your printing expert, guiding you through the printing process is a key component for a successful printing project. To ensure you leave lasting impressions, we'll help you from start to finish with selecting professional graphic treatment, paper and design options, and recommending production and distribution methods.

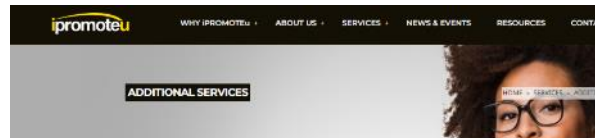
Proforma will help you deliver creative and professional results with custom or web-based print-on-demand projects and dynamic services including:

- Annual Reports / Executive Business Material
- Booklets, Handbooks and Catalogs
- Flyers, Posters and Brochures
- Marketing Materials and Sales Collateral
- Binding and Finishing
- Creative Services
- Custom Packaging
- Prepress and Digital Printing
- Green/Eco-friendly Printing
- Variable Data Printing
- Direct Marketing

To learn how our Printing solutions can uniquely introduce your company and brand, [contact us today!](#)

About Proforma

- ABOUT
- EXECUTIVE TEAM
- HISTORY & RECOGNITION
- STRATEGIC PARTNER OPPORTUNITIES
- NEWS
- BLOG
- CAREERS



COMPLETE SUPPORT FOR YOUR SUCCESS

No other promotional products distributor provides as much service and support to Affiliates as IPROMOTEU. We believe that your success is our success, and so we're committed to providing the resources, advice, training, and services that you need to help you achieve a level of personal and professional success that you never before thought possible. We are constantly adding new services to our Affiliate support portfolio.



TRADE SHOW PARTICIPATION

IPROMOTEU attends, exhibits at, and sponsors a number of promotional products industry events around the country. As an IPROMOTEU Affiliate, we can get you access to these events without any additional cost — even if you're not a member of the show's host association or organization.

PRINT & PACKAGING

IPROMOTEU has won extensive awards for our print and packaging services over the years. Whether you already use or want to use roll-coated press and packaging services, IPROMOTEU can help. Our print and packaging division is led by industry expert Bob Schwell, who has formed a preferred print vendor network with thousands of printing, special programs, and more — exclusively for IPROMOTEU Affiliates.

■ WHAT DOES CONVERGENCE MEAN TO YOU?

Opportunity to Add Print to....

Grow Sales

**Meet
Customer
Demand**

**Increase
Customer
Stickiness**

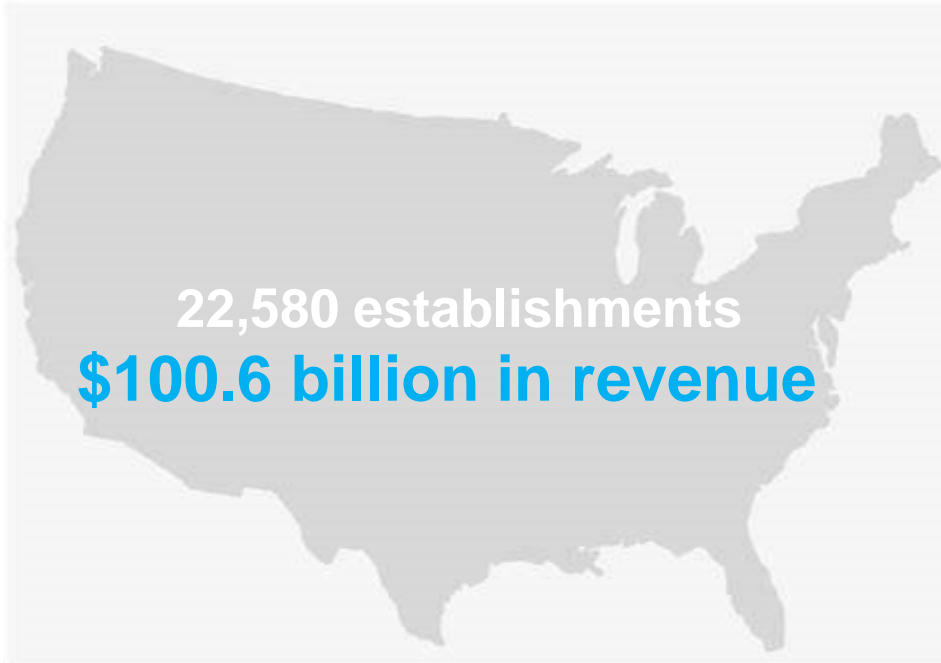
**Diversify Revenue
Streams**



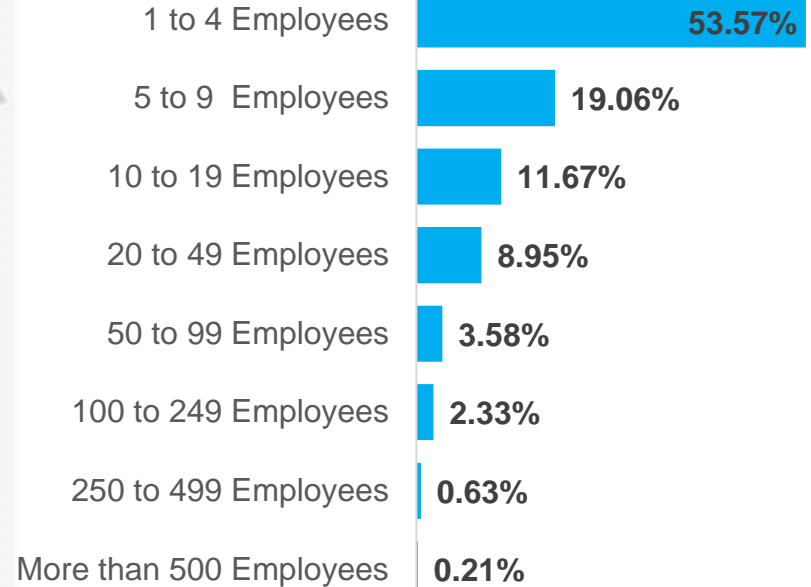
Photo is licensed under CC BY-NC

THE PRINT OPPORTUNITY

PRINTING INDUSTRY BY THE NUMBERS

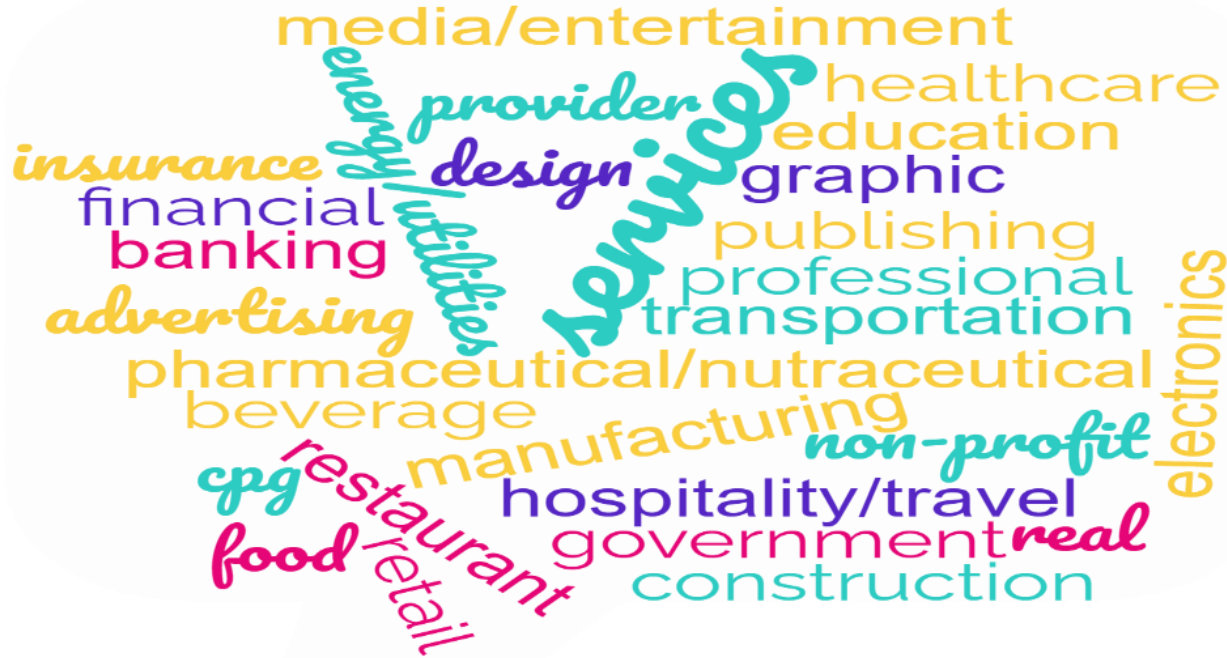


Establishments by Size



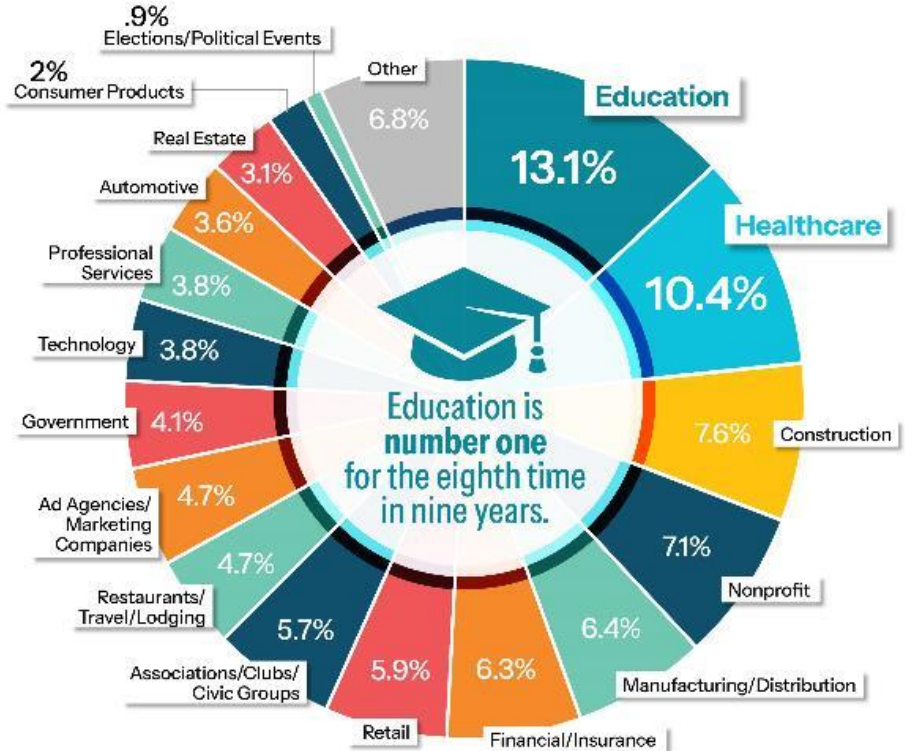
Source: U.S. Census Bureau's County Business Patterns, 2021 (most current reference year)

■ ALL INDUSTRIES USE PRINT



WHERE IS YOUR OVERLAP?

These are the top markets for **promo products** sales – and they all use print!



Source: 2023 State of the Industry (ASI Research)

MANY PRINT APPLICATIONS



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

■ PRINT & PROMO: WORKING TOGETHER IN DIRECT MAIL



■ PACKAGING, PRINT, AND PROMO

Swag Box



Source: Sky High Marketing (asi/328476)

Digital Printing Offers Opportunities



Just launched: World's first full-color, on-demand, right-sized box system

■ OPPORTUNITY TO ENHANCE CUSTOMER EXPERIENCE

- Typically, different suppliers for print and promo components but increasing customer preference for single sourcing
- 75% of communication buyers and influencers prefer full-service providers
Source: NAPCO Research 2024
- Opportunity to consolidated supplier base and enhance customer experience



Image licensed under CC BY-NC-ND

PRINT IS VALUABLE AND USED

COMMUNICATION BUYERS VALUE PRINT



It Communicates
Quality.

94%



It Stands Out In Today's
Media-cluttered World.

92%



It Enhances
One's Brand.

89%



It Yields Higher
Retention Levels.

85%





It Demonstrates
Credibility and Authority.

88%

n=75 Communication Buyers and Influencers

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

ORGANIZATIONS USE AND VALUE PRINT

- Print is an important communication method for our organization **93%**¹
- Printed marketing materials deliver results to our organization **92%**¹
- **Factors Compelling Print Use**² 
 - Link print and digital media **42%**
 - ROI tools for print vs. other media **41%**
 - Tie print use to sales **38%**
 - Case studies on print's value **35%**
- **Factors Preventing Print Use**² 
 - Too expensive **43%**
 - Can't track **33%**
 - Lack expertise in using **31%**
 - Not effective **31%**



¹n=316 Communication Buyers and Influencers, Source: NAPCO Research Annual Commercial Print Industry Trends and Strategies Service, 2023

²n=175 Marketers, Source: The 2021 Marketing Media Mix Survey, NAPCO Research

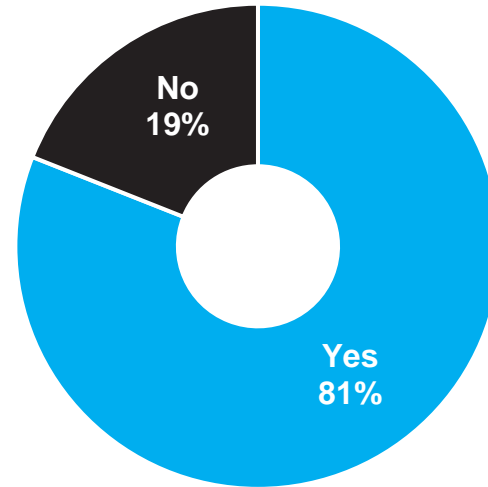
PRINT AND DIGITAL MEDIA USED TOGETHER

Average number of media types used in a typical multi-channel/omni-channel communication: 4



81% Use Print in Multi-channel Campaigns

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



n=316 Communication Buyers and Influencers
Source: NAPCO Research Annual Commercial Print Industry Trends and Strategies Service, 2023

TYPES OF PRINT PROVIDERS

WHERE ORGANIZATIONS BUY PRINT

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.

FINDING PRINT PROVIDERS

Provider at Top of List
\$5.3 Billion in Sales

Provider at End of List
\$5.5 Million in Sales

Printing Impressions
AMERICA'S MOST INFLUENTIAL AND MOST RESPONSIBLE FOR THE PRINTING INDUSTRY

2023 PRINTING IMPRESSIONS 300

40th ANNIVERSARY

Presenting Our 40th Annual List of the Top 300 Printing Companies in the U.S. and Canada

PRINTING IMPRESSIONS 300		2023 Ranking	2022 Ranking	Company Name	Headquarters	2023 Sales (\$M)	2022 Sales (\$M)	2023 Revenue Change (%)	2022 Revenue Change (%)	2023 Revenue Change (%)	2022 Revenue Change (%)
1	1	1	1	ESKO	Ann Arbor, MI	5,300.00	5,200.00	1.00%	1.00%	1.00%	1.00%
2	2	2	2	Graphic World	St. Louis, MO	4,800.00	4,700.00	2.13%	2.13%	2.13%	2.13%
3	3	3	3	Graphic Solutions	St. Louis, MO	4,500.00	4,400.00	2.27%	2.27%	2.27%	2.27%
4	4	4	4	Graphic Services	St. Louis, MO	4,200.00	4,100.00	2.44%	2.44%	2.44%	2.44%
5	5	5	5	Graphic Systems	St. Louis, MO	3,900.00	3,800.00	2.63%	2.63%	2.63%	2.63%
6	6	6	6	Graphic Technology	St. Louis, MO	3,600.00	3,500.00	2.86%	2.86%	2.86%	2.86%
7	7	7	7	Graphic World	St. Louis, MO	3,300.00	3,200.00	3.13%	3.13%	3.13%	3.13%
8	8	8	8	Graphic Solutions	St. Louis, MO	3,000.00	2,900.00	3.45%	3.45%	3.45%	3.45%
9	9	9	9	Graphic Services	St. Louis, MO	2,700.00	2,600.00	3.85%	3.85%	3.85%	3.85%
10	10	10	10	Graphic Systems	St. Louis, MO	2,400.00	2,300.00	4.35%	4.35%	4.35%	4.35%

3 Printing Impressions_Phaidon December 2023

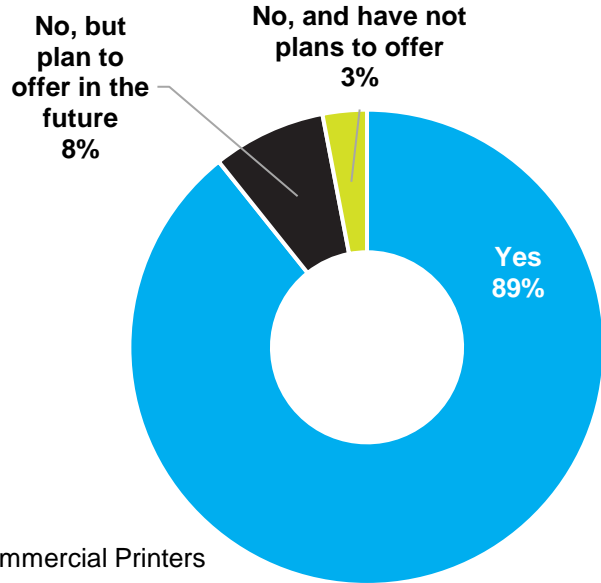
PRINTING IMPRESSIONS 300		2023 Ranking	2022 Ranking	Company Name	Headquarters	2023 Sales (\$M)	2022 Sales (\$M)	2023 Revenue Change (%)	2022 Revenue Change (%)	2023 Revenue Change (%)	2022 Revenue Change (%)
298	298	298	298	Graphic Solutions	St. Louis, MO	5.50	5.50	0.00%	0.00%	0.00%	0.00%
299	299	299	299	Graphic Services	St. Louis, MO	5.50	5.50	0.00%	0.00%	0.00%	0.00%
300	300	300	300	Graphic Systems	St. Louis, MO	5.50	5.50	0.00%	0.00%	0.00%	0.00%

Not Listed in Our 2023 Rankings?
If your company would have appeared in the 2023 Printing Impressions 300 but did not, we'll contact you for next year's list. Write to: Printing Impressions, Attn: Editor, 1500 Spring Garden St., Suite 100, Philadelphia, PA 19130 or email editor@printingimpressions.com. We'll add your firm to our database to be contacted for inclusion in our post rankings.

CONNECTIVITY: ONLINE ORDERING

Offer Customized E-commerce Sites

Q. Do you offer customers access to customized e-commerce sites for order entry and materials management?

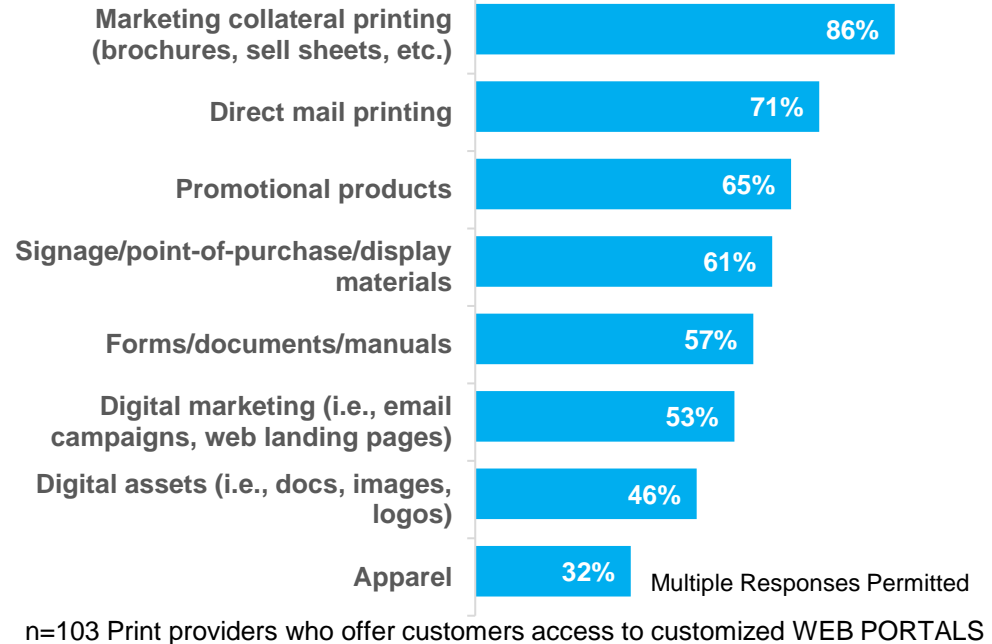


n=122 Commercial Printers

Source: *Web Portals, New Path to Print Profitability*, NAPCO Research/Propago 2023

Items Supported by E-commerce Sites

Q. Which of the following items can your customers order through the e-commerce sites your organization creates for them?



ENTERING THE MARKET

■ KEY ENTRY METHODS

Partner with
Current
Customers

Partner with
Purchasing
Departments

Partner with
Print Providers

Acquire
Distributors
that Offer Print

■ ENTRY METHOD: PARTNER WITH CUSTOMERS

Partner with Current Customers

- Existing business relationship and trust of current customers
- Customer familiarity may reduce buying process
- Understanding customers can lead to realistic product options aligned with their comfort level
- Organizations looking for simplified supply chains

■ ENTRY METHOD: PURCHASING DEPARTMENTS

Partner with
Purchasing
Departments



■ ENTRY METHOD: PARTNER WITH PRINT PROVIDERS

PRINT INDUSTRY SALES STAFF CHALLENGES

Partner with
Print Providers

62%

of commercial printers and sign
and display graphic providers
**report hiring sales staff is a
critical/moderate challenge.**

Sources: NAPCO Research Annual Print Commercial Print Trends and Strategy Service, 2023 and Who Buys Sign and Display Graphics?, NAPCO Research 2023

ENTRY METHOD: ACQUISITION

Printing Impressions

Acquire
Distributors
that Offer Print

BUSINESS MANAGEMENT, MERGERS AND ACQUISITIONS

August 26, 2023

Premier Press Combines Forces with KG Specialties, Expands Production

- 1 FACEBOOK
- 2 TWITTER
- 3 LINKEDIN
- 4 EMAIL
- 5 COMMENTS

LEADERSHIP

PREMIER PRESS
Press Demo, Canon
ProStream 3000
Product Video

Premier Press, an award-winning creative production company, announced that it has combined forces with KG Specialties, a branded merchandise company, to expand Premier's in-house capabilities and enable the company to quickly deliver on growing client demands. KG Specialties President and Owner Kyle Gibson will join Premier as director of promotional merchandise, and all KG Specialties employees will transition to Premier's facilities.



Premier Press headquarters in Portland, Oregon.

BUSINESS MANAGEMENT

September 27, 2021

Grossman Marketing Group Acquires Branded Merchandise Company, Symbol Marketing & Promotions

- 1 FACEBOOK
- 2 TWITTER
- 3 LINKEDIN
- 4 EMAIL
- 5 COMMENTS

For the last century, Grossman Marketing Group has developed a reputation for its expertise in assisting its clients with its marketing initiatives. Today, Grossman Marketing Group took another step in its efforts to further expand its New England footprint as the group announced the acquisition of New Hampshire-based Symbol Marketing & Promotions.



BUSINESS MANAGEMENT

June 1, 2022

Wallace Graphics Purchases The Corporate Shop

- 1 FACEBOOK
- 2 TWITTER
- 3 LINKEDIN
- 4 EMAIL
- 5 COMMENTS

LEADERSHIP

WALLACE GRAPHICS
Press Demo, Canon
ProStream 3000
Product Video

Wallace Graphics, an integrated commercial print, mail, and marketing services provider in Duluth, GA, announces that it has become the parent company of The Corporate Shop, Duluth, GA. This acquisition represents an expansion for Wallace Graphics into the promotional products marketing space and adds an 18,000 sq. ft. facility which includes a world-class showroom, dedicated custom branded apparel production space, 14 employees, and a dedicated Account Manager. The Corporate Shop's co-owner, Julie and Steven Noubauer, have joined the Wallace Graphics team as well.



Credit: Wallace Graphics | The Corporate Shop

Established in 1999, The Corporate Shop ranks in the top 4% of distributors in the industry and has become Atlanta's premier source for branded apparel and custom promotional products. They have been listed as one of Atlanta's top 10 promotional distributors for six consecutive years and named to the Top 100 women-owned businesses in Georgia.

BUSINESS MANAGEMENT

March 4, 2024

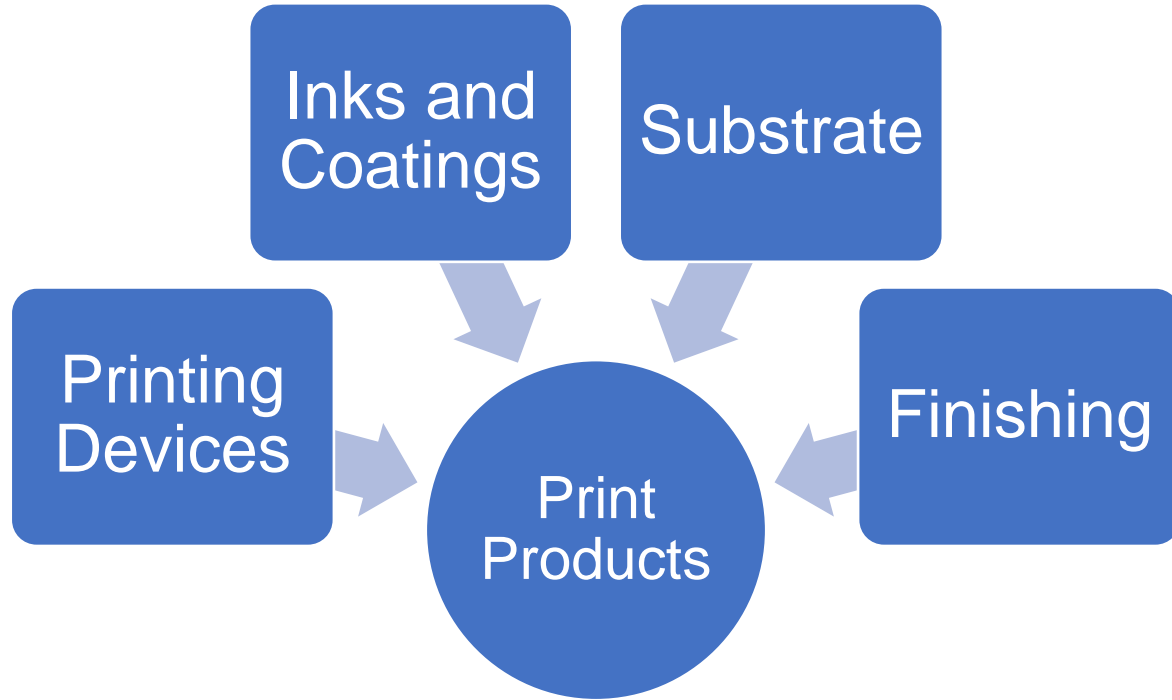
Adding Promotional Products Creates New Revenue Streams

A Different Approach: Acquisition

Innmark, based Annapolis Junction, Maryland, ventured into the promotional products world a little differently. Rather than just adding products relative to demand and success, Innmark acquired a dedicated promotional products company, which came with staff well-versed in the ins and outs, as well as relationships with vendors.

PRINTING PROCESS

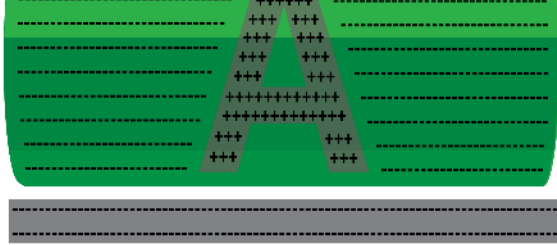
■ CORE COMPONENTS OF PRINT



MANY TYPES OF PRINTING PROCESSES

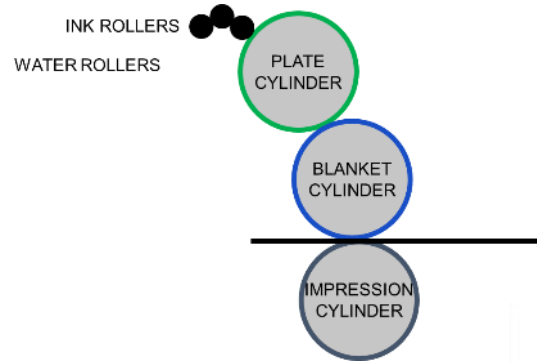
DIGITAL PRINTING

TONER IS FUSED TO SUBSTRATE

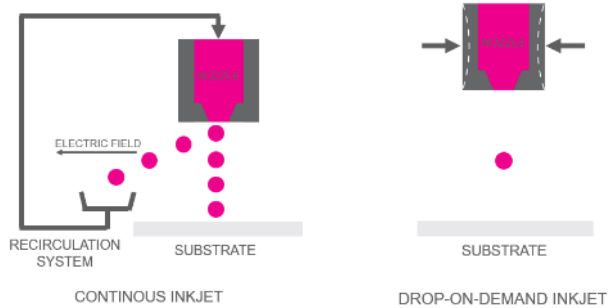


ANALOG PRINTING

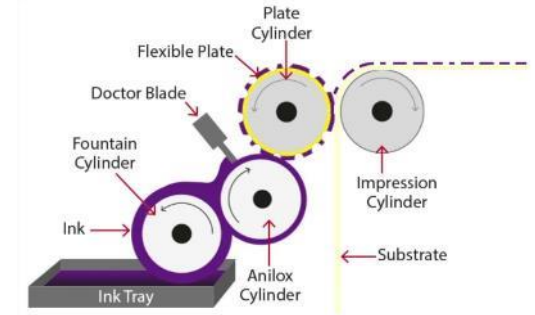
OFFSET



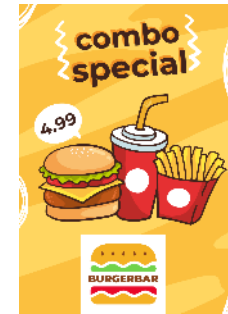
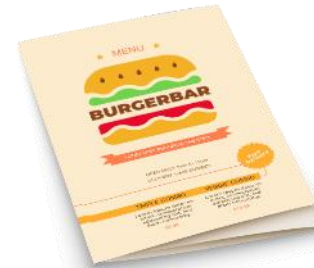
INKJET



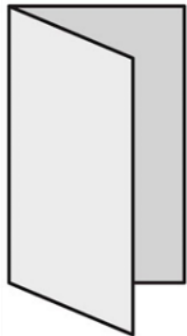
FLEXOGRAPHY



■ NOT COMPLETE UNTIL FINISHED



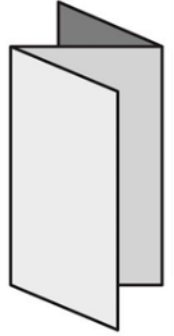
BINDING AND FOLDING



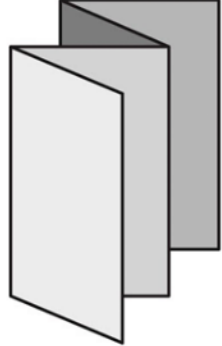
HALF FOLD



TRI FOLD



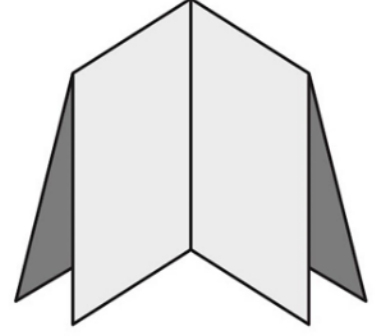
Z FOLD



ACCORDION FOLD

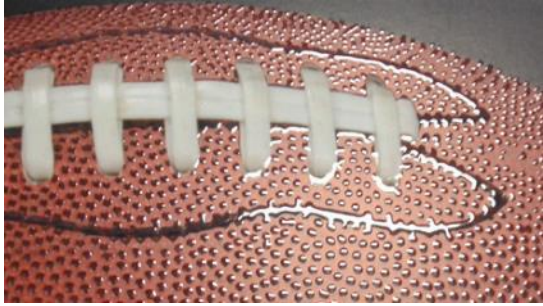


GATE FOLD



QUARTER FOLD

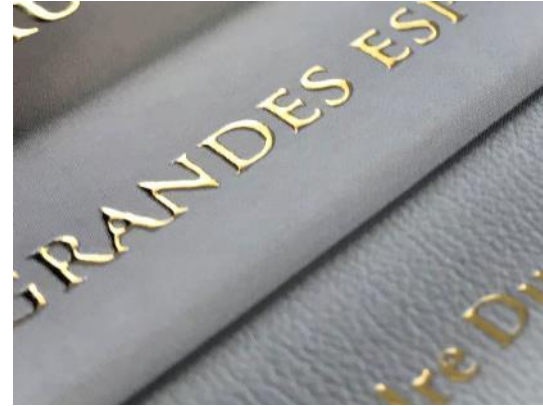
EFFECTS, SCORING, AND PERFORATING



DIGITAL SPOT VARNISH



EMBOSSING



FOIL STAMPING



SCORING



PERFORATING

DIGITAL WIDE-FORMAT PRINTERS BY INK TYPE

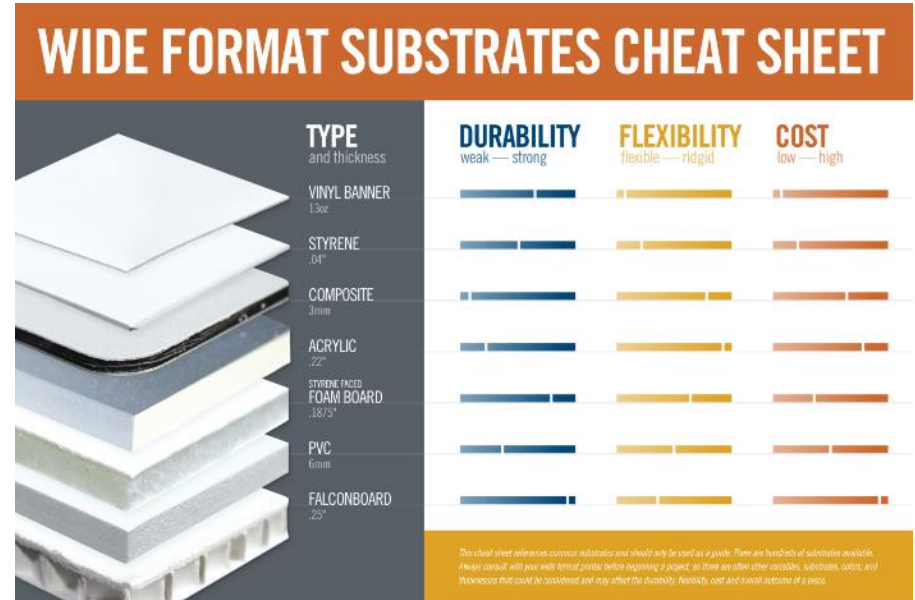
The oversized print work that is common in sign and display production is often produced on digital wide-format devices — typically in print widths greater than 24". Digital wide-format printers can be roll-fed devices, flatbed printers, or a combination of both (hybrid). Table summarizes the types of inks used in wide-format printing, their key applications, and strengths/weaknesses.

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

MANY SUBSTRATE CHOICES

A core factor driving the creativity and diversity of applications is that digital wide-format printing devices can print on an extensive collection of media and substrates. Here is a sampling of common substrates used in producing signs and graphics:

- Paper and paperboard
- Vinyl
- Acrylic
- PVC
- Fabric
- Window film
- Foamcore
- Adhesive sheeting



Source: Suttle-Straus

FINISHING OPTIONS

Finishing is an essential component in the production of most sign and display graphic applications. Here is a list of common finishing options:

- **Laminating and coating**
- **Mounting**
- **Sewing**
- **Grommets:** punching holes in a print and reinforcing with metal or plastic rings through which string or other material can be threaded and used to mount or secure a sign
- **Cutting:** options include diecutting with a shaped steel die that cuts the print into a shape, or laser cutting, which can create more elaborate and complex shapes or effects
- **Routing:** automates the cutting process and enables the creation of more elaborate patterns, grooves, and shapes
- **Tiling:** divides a large image into smaller pieces or tiles which are assembled like a giant jigsaw puzzle



<https://spectrumsigns.com/>

TIPS FOR GETTING STARTED

■ FINDING PRINT BUYERS: KEY JOB TITLES

- Merchandisers
- Visual Merchandisers
- Designers
- Purchasing Director
- Purchasing Manager
- Business Manager
- Marketing Executive
- Marketing Director
- Chief Experience Officer
- Event Manager
- Brand Manager
- Human Resources Director
- Marketing Coordinator
- Marketing Manager
- Store Manager
- Chief Marketing Officer
- Customer Relationship/
Loyalty Manager
- Communications Director
- Office Manager
- Product Manager
- Facilities Manager



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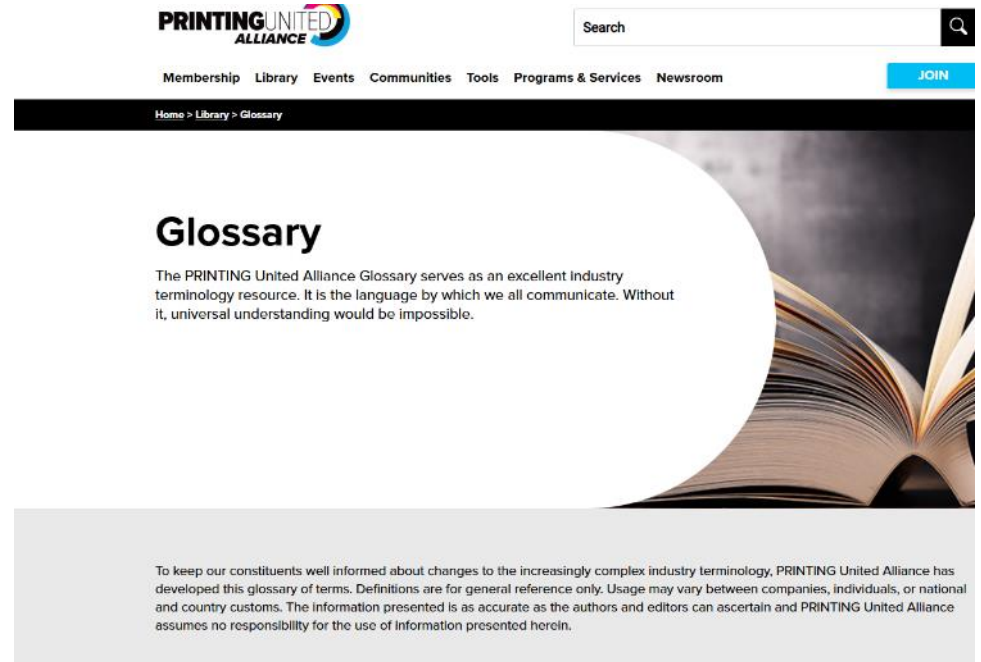


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Glossary

The PRINTING United Alliance Glossary serves as an excellent industry terminology resource. It is the language by which we all communicate. Without it, universal understanding would be impossible.

To keep our constituents well informed about changes to the increasingly complex industry terminology, PRINTING United Alliance has developed this glossary of terms. Definitions are for general reference only. Usage may vary between companies, individuals, or national and country customs. The information presented is as accurate as the authors and editors can ascertain and PRINTING United Alliance assumes no responsibility for the use of information presented herein.

■ BEST-PRACTICE TIPS

- Assess the opportunity to sell print products to current customers.
- Speak with current customers about print needs.
- Choose products carefully and start by offering a limited number of products.
- Join associations such as ASI and PRINTING United Alliance.
- Form partnerships with print service providers. The industry is facing labor challenges and may need your services.
- Read industry publications and content.
- Attend PRINTING United, September 10-12 in Las Vegas (www.printingunited.com).

