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PRIMIR Study Reports on Printing Process Trends

A new Print Industries Market Information and Research Organization (PRIMIR) study, *Current and Future Trends in Printing Processes and Run Lengths* was published this week and distributed to all members of PRIMIR and NPES.

The research was conducted by a consortium of leading industry consultants, PrintCom Consulting, Strategies for Management, and Naselli & Associates. According to the research team, “Between 2006 and 2011, the installed base of most categories of printing equipment will contract and consolidate, due in large part to the contraction and consolidation of establishments within the industry.” By contrast, the research team forecasts installed base growth in digital equipment. The real growth of digital printing may, however, be masked as companies enter the business of printing materials digitally but do not classify themselves as “printers” but rather as “marketing services providers.”

Surprisingly, JDF and other elements of “integrated automation” are not the killer app for new press purchases. Simply put, JDF is not driving purchases. Instead, “the need for specific capability or a more marketable capacity is the prime driving factor for a press purchase.”

According to the study, when doing product-by-product and process-by-process comparisons there is no significant run length change, with the exception of very long run publication printing where some changes have occurred. These changes have no effect on printing process (typically heatset web offset), though they have an obvious effect on the dollar value of the job.

The study also investigated print process shift trends. According to the research team, the only *commercial printing* process shift anticipated in the next five years is the continued

migration of print dollars from offset to digital. The biggest change, however, will be the continued migration to electronic media.

The 350+ page study provides an in-depth qualitative and quantitative evaluation of all major processes and print products for both commercial printing and inplant printing.

The Print Industries Market Information and Research Organization (PRIMIR), provides in-depth research and analysis for the graphic communications industry. Formed in 2005 when the NPES Market Research Committee merged with GAMIS, PRIMIR annually provides its members with current, relevant market data and detailed information on graphic arts and related fields. Members also benefit from meetings, market research skills building, and robust networking opportunities.

The “*Current and Future Trends in Printing Processes and Run Lengths*” study has been distributed exclusively to PRIMIR and NPES members. For PRIMIR membership information contact Jackie Bland, Managing Director at jbland@primir.org, or by phone at (703) 264-7200, ext. 287.

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