



BEYOND INK

State of Print: Shifts & Predictions

The 2023 State of Print covers many challenges and modernizations facing the ever-changing printing industry.

WEB: brprinters.com EMAIL: info@brprinters.com

San Jose CA
(HQ, CMC, & EPIC)
665 Lenfest Rd.
San Jose, CA 95133
408-278-7711

San Diego, CA
(CDM)
7606 Miramar Rd.
#7200
San Diego, CA 92126
856-677-1727

Denver, CO
(BR DENVER)
5050 Moline St.
Denver, CO 80239
303-765-1383

Denver, CO
(ROSS4MARKETING &
C&D PRINTING)
550 East 76th Ave.
Denver, CO 80229
303-287-3217

Independence, KY
(BR KENTUCKY)
10154 Toeppen Dr.
Independence, KY 41051
859-292-1700

Appleton, WI
(NGS)
2600 North Ballard Rd.
Appleton, WI 54911
920-734-7500

Cincinnati, OH
(BR OHIO)
3962 Virginia Ave.
Cincinnati, OH 45227
800-598-7808



BEYOND INK

Table of Contents

- Introduction.....1
- Substrate Availability and Pricing.....2
- Workflow Automation & Digital Enhancements.....3
- Trade Print.....4
- Education Print.....5
- What Publishers Should Be Asking in 2023.....6

Introduction

The 2023 State of Print covers many challenges and modernizations facing the ever-changing printing industry. Our educational insights cover topics from the future of printing technology, business practices, and growing customer demand. We hope to empower our clients and peers with ideas to assist in adapting to the print trends of this shifting market.

One constant trend in the print industry is change. As this industry evolves, we understand the importance to stay agile and adapt to market shifts.

Our BR marketing team in collaboration with printing industry experts and sales leaders of BR Printers, Bog Durgy and Steve Duvanich bring these findings to your hands.



Steve Duvanich
Director, Enterprise Sales



Bob Durgy
SVP of Business Development



BEYOND INK

WEB: brprinters.com EMAIL: info@brprinters.com

San Jose CA
(HQ, CMC, & EPIC)
665 Lenfest Rd.
San Jose, CA 95133
408-278-7711

San Diego, CA
(CDM)
7606 Miramar Rd.
#7200
San Diego, CA 92126
856-677-1727

Denver, CO
(BR DENVER)
5050 Moline St.
Denver, CO 80239
303-765-1383

Denver, CO
(ROSS4MARKETING & C&D PRINTING)
550 East 76th Ave.
Denver, CO 80229
303-287-3217

Independence, KY
(BR KENTUCKY)
10154 Toeppen Dr.
Independence, KY 41051
859-292-1700

Appleton, WI
(NGS)
2600 North Ballard Rd.
Appleton, WI 54911
920-734-7500

Cincinnati, OH
(BR OHIO)
3962 Virginia Ave.
Cincinnati, OH 45227
800-598-7808

BEYOND INK

Substrate Availability and Pricing

Substrate availability and pricing has been top of mind in the industry over the past few years, with the price of paper still on the rise. Bouncing back from lockdown, demand for paper increased faster than supply was able to produce.

THE SHIFT

In late 2022 we saw a slight stabilization of demand and supply, with coated and uncoated stocks being replenished to pre-pandemic availability.

THE PREDICTION

2023 will be a barometer for the new standard of substrate pricing for years to come. With labor costs skyrocketing and the global supply chain still fighting to get back on track, this year will set the stage for what our industry should expect in pricing for years to come.

"Substrate availability and pricing. I mean obviously, we're fighting a lot of headwinds in inflation. We're seeing materials costs and labor costs through the roof; particularly paper costs which are a prime component of what we do. Paper pricing is up you know, 40, 50, 60 percent over the last year. Cover pricing is up even more than that. So that's capturing our materials making sure we stay holding our costs and passing on increases of those materials to our customers wherever possible. The offset papers, the uncoated stuff, the 50s and 60s of the world, availability is loosening it up. We're able to get that coated market. Your masks, your silks, your glosses, are still going to be supply chain-challenged over the next couple of years.

It hasn't been the driving factor lately which is so weird because for the first 10 years, I was doing this it was all price, then quality, then schedule, then service. It was like price first then everything else. Lately, it's been "When can you get me books? Can you meet my spec? Can you get the paper I like? Then price". That's starting to change and particularly in one color.

I anticipate more price-based discussions in the coming year and more feedback about competitiveness."

-Steve Duvanich, Director Enterprise Sales

"Paper has loosened up tremendously which is an indicator that demand is stabilizing. Paper is not going to be the reason we're not going to sell books. Uncoated which, is most of what we do, white uncoated white. So, your 50-pound, your 60-pound, your 70-pound offset there's no concern about availability in the coming year. It's available. Coated stocks, a real coat in stock is a gloss or enamel that's high gloss. Very expensive glossy paper is becoming hard to get and will continue to be hard. There's no "around the corner it's going to get better" from everything I read this is it. This is a new reality. You're going to pay a lot more for that paper."

-Bob Durgy SVP, Business Development



BEYOND INK

WEB: brprinters.com EMAIL: info@brprinters.com

San Jose CA

(HQ, CMC, & EPIC)
665 Lenfest Rd.
San Jose, CA 95133
408-278-7711

San Diego, CA

(CDM)
7606 Miramar Rd.
#7200
San Diego, CA 92126
856-677-1727

Denver, CO

(BR DENVER)
5050 Moline St.
Denver, CO 80239
303-765-1383

Denver, CO

(ROSS4MARKETING &
C&D PRINTING)
550 East 76th Ave.
Denver, CO 80229
303-287-3217

Independence, KY

(BR KENTUCKY)
10154 Toeppen Dr.
Independence, KY 41051
859-292-1700

Appleton, WI

(NGS)
2600 North Ballard Rd.
Appleton, WI 54911
920-734-7500

Cincinnati, OH

(BR OHIO)
3962 Virginia Ave.
Cincinnati, OH 45227
800-598-7808

BEYOND INK

Workflow Automation & Digital Enhancements

The special effects and ease of flow that can be achieved with a digitally enhanced and automated press breathe new excitement into print media and moves the printer and buyer away from a conversation centered around the price, and toward one centered around unique capabilities and processes.

THE SHIFT

Publishers and print buyers alike continue to seek optimized and enhanced methods of print production. Easing the process to execute the print marketing and communication for their target audiences.

THE PREDICTION

Workflow automation and digital enhancements are what will separate the printers of the past and the printers of the future. As the world around us continues to revolutionize with technological advancement, it has been a long time coming for printing companies and the print industry as a whole to emerge along with it.

"As we prepare for 2023, the discussion to be had is how to fortify digital printing strategies with our customers. Proactively having conversations about what our clients anticipate and if digital fits into their strategy when demand alters. Having the discussions to say: here's what we're seeing, here's what we anticipate, and let's have the conversation now to grow together and optimize output. I'm excited about the digital capacity we're bringing on in 2023. True redundancy across each of our facilities with the continued ability to offer reliability. That is BR's opportunity. I'm equally as excited about our workflow automation. Our IT growth and integrations have been awesome and believe that 2023 is when we take the next step. Empowering our customers with real-time and interactive data, it's a major priority for us."

-Bob Durgy, SVP of Business Development

"I anticipate in the technological evolution over the next few years, the digital workload will compete as an offset replacement at higher quantities. I don't think we're quite there yet. We are pushing the boundaries of digital to a higher quantity as a web replacement. There is a range that we're looking to push our digital quantities up that could easily take a lower run off the web and allow them to free up for those longer runs. As we grow and increase our number of titles, having a hands-off approach to getting those files into through prep into production load into the press, in a hands-off environment is going to be key. Minimizing the amount of preparation time and the number of hands it needs to be transferred between before uploading to the press is an exciting evolution. We're building out automation systems to handle the ins and outs and loading of that work is going to be key as we look to increase our volume moving ahead."

-Steve Duvanich, Director Enterprise Sales



BEYOND INK

WEB: brprinters.com EMAIL: info@brprinters.com

San Jose CA

(HQ, CMC, & EPIQ)
665 Lenfest Rd.
San Jose, CA 95133
408-278-7711

San Diego, CA

(CDM)
7606 Miramar Rd.
#7200
San Diego, CA 92126
856-677-1727

Denver, CO

(BR DENVER)
5050 Moline St.
Denver, CO 80239
303-765-1383

Denver, CO

(ROSS4MARKETING &
C&D PRINTING)
550 East 76th Ave.
Denver, CO 80229
303-287-3217

Independence, KY

(BR KENTUCKY)
10154 Toeppen Dr.
Independence, KY 41051
859-292-1700

Appleton, WI

(NGS)
2600 North Ballard Rd.
Appleton, WI 54911
920-734-7500

Cincinnati, OH

(BR OHIO)
3962 Virginia Ave.
Cincinnati, OH 45227
800-598-7808

BEYOND INK

Trade Print

The trade print sector saw the largest spike during the lockdown. Emerging past the pandemic, trade print is beginning to see a decrease in demand.

THE SHIFT

Demand for trade print remains above pre-pandemic levels. That said, global hubs such as Amazon significantly reduced their inventory over Q3 and Q4 in 2022.

THE PREDICTION

Digital book printing companies will have the advantage to adapt to shorter runs in the trade market and reduce the risk of sitting on inventory. It's a changing of the guards in trade print to see who can excel at reducing risk and producing precisely what demand is requesting.

"Publisher demand conditions vary by the market served. So, certain segments of the market appear to be softening, such as trade. There are other sectors of print like education, which are going to remain strong. Trade print appears to be softening compared to the pandemic. During the pandemic, people are staying at home, reading a lot, and marketers capitalized on increasing direct mail campaigns. So, trade now has softened a little bit, industry predictions are that trade volumes are going to be down from the last few years. However, they'll still be up over pre-pandemic levels, right? Trade production may be down in 2023 compared to the last couple of years because of the enormous spike. That said, we're still up over pre-pandemic on trade print."

-Steve Duvanich, Director Enterprise Sales

"I expect to see some decrease in the trade market as we head into Q1 of 2023. The best indicator we have seen so far is Amazon. At the end of the third quarter, they reached out to publisher distributors, and they placed their orders for the fourth quarter which includes the anticipation of holiday demand. It was light. And, in some cases, non-existent and it set off a big shock wave in the publishing community. Much lighter than 2022 or the year before. It's an indicator that there is plenty of stock already and that they don't expect demand to be anything they can't handle. Now that's not necessarily the end of the world, it just means they have outpaced the spiked demand over the Covid years. Their demand is still light now as we close out 2022, and light doesn't always hurt. As digital book printers, we stay nimble in being able to adapt to shorter runs, print closer to demand, and reduce the burden of carrying big inventory."

-Bob Durgy, SVP of Business Development



BEYOND INK

WEB: brprinters.com EMAIL: info@brprinters.com

San Jose CA

(HQ, CMC, & EPIC)
665 Lenfest Rd.
San Jose, CA 95133
408-278-7711

San Diego, CA

(CDM)
7606 Miramar Rd.
#7200
San Diego, CA 92126
856-677-1727

Denver, CO

(BR DENVER)
5050 Moline St.
Denver, CO 80239
303-765-1383

Denver, CO

(ROSS4MARKETING &
C&D PRINTING)
550 East 76th Ave.
Denver, CO 80229
303-287-3217

Independence, KY

(BR KENTUCKY)
10154 Toeppen Dr.
Independence, KY 41051
859-292-1700

Appleton, WI

(NGS)
2600 North Ballard Rd.
Appleton, WI 54911
920-734-7500

Cincinnati, OH

(BR OHIO)
3962 Virginia Ave.
Cincinnati, OH 45227
800-598-7808

BEYOND INK

Education Print

The pandemic hit the educational print sector the hardest. That said, printed books remain vital, and in most cases remain the preferred format for education. Surveys and studies alike, often find students prefer learning from a tangible book rather than in a digital format.

THE SHIFT

Educational demand has seen a resurgence and growth beyond pre-pandemic levels. The pandemic showed the importance of the educational print sector. .

THE PREDICTION

In 2023, and for years to come, the industry can anticipate educational print to be the most immensely growing sector. Print trends and professionals predict that demand will stay strong in redesigning the curriculum to align with revisions, additions, and edits to stay consistent with local, state, and federal education policies.

"Publisher demand conditions vary by the market served. Certain segments of the market appear to be softening, such as trade. There are other sectors of print like education, which are going to remain strong and I anticipate growing tremendously. That said, here at BR we are actively increasing our capacity to serve the educational market because that's where the growth will be for the next several years. We are seeing a resurgence of educational print in our post-pandemic transition. The pandemic showcased the importance of the educational print sector and we are seeing positive upticks of demand from our publisher's partners."

-Steve Duvanich, Director Enterprise Sales

"Educational print has been our most consistent market served at BR. Our capabilities seamlessly complement an educational product. There's a lot more time and effort placed into an educational product compared to a product like trade. There are a lot more resources involved in putting educational books out and that higher unit rate is supported. As we've entered 2023, I anticipate the educational market to stay strong and most likely grow due to the surge of post covid educational publications. Demand stays strong in redesigning the curriculum to align with revisions, additions, and edits to stay consistent with local, state, and federal education policies. We may start seeing that early on in 2023 from states like California, Texas, and Florida. They lead the charge in the educational market and serve as a good barometer of the demand that lies ahead. That said, it's important to be mindful of other print sectors such as trade to complement the educational surge. We will stay agile in our approach to best serve the print sectors our clients seek to target. It shall be a very busy 2023 for publishers."

-Bob Durgy, SVP of Business Development



BEYOND INK

WEB: brprinters.com EMAIL: info@brprinters.com

San Jose CA
(HQ, CMC, & EPIC)
665 Lenfest Rd.
San Jose, CA 95133
408-278-7711

San Diego, CA
(CDM)
7606 Miramar Rd.
#7200
San Diego, CA 92126
856-677-1727

Denver, CO
(BR DENVER)
5050 Moline St.
Denver, CO 80239
303-765-1383

Denver, CO
(ROSS4MARKETING &
C&D PRINTING)
550 East 76th Ave.
Denver, CO 80229
303-287-3217

Independence, KY
(BR KENTUCKY)
10154 Toeppen Dr.
Independence, KY 41051
859-292-1700

Appleton, WI
(NGS)
2600 North Ballard Rd.
Appleton, WI 54911
920-734-7500

Cincinnati, OH
(BR OHIO)
3962 Virginia Ave.
Cincinnati, OH 45227
800-598-7808

BEYOND INK

What Publishers Should Be Asking in 2023

Shifts in the printing industry and economy mean professionals need to stay on their toes. Below are a few questions you should be asking yourself and your team if you're a publisher.

- **What sector of the publishing market brings in most of our business?**
- **How can we serve those sectors best?**
- **How does digital print fit into your strategy when demand is contracting?**
- **How far ahead have we planned?**
- **Can we standardize our paper types?**

The Next Year at BR Printers

In 2023, BR Printers is excited to strengthen redundancy with the ability to offer reliability. We have some big announcements around the corner that will significantly enhance our digital and web capabilities. Stay tuned to BR's latest announcements, industry trends, news, and more by checking out our website and following us on our socials.



BEYOND INK

WEB: brprinters.com EMAIL: info@brprinters.com

San Jose CA

(HQ, CMC, & EPIC)
665 Lenfest Rd.
San Jose, CA 95133
408-278-7711

San Diego, CA

(CDM)
7606 Miramar Rd.
#7200
San Diego, CA 92126
856-677-1727

Denver, CO

(BR DENVER)
5050 Moline St.
Denver, CO 80239
303-765-1383

Denver, CO

(ROSS4MARKETING &
C&D PRINTING)
550 East 76th Ave.
Denver, CO 80229
303-287-3217

Independence, KY

(BR KENTUCKY)
10154 Toebben Dr.
Independence, KY 41051
859-292-1700

Appleton, WI

(NGS)
2600 North Ballard Rd.
Appleton, WI 54911
920-734-7500

Cincinnati, OH

(BR OHIO)
3962 Virginia Ave.
Cincinnati, OH 45227
800-598-7808