

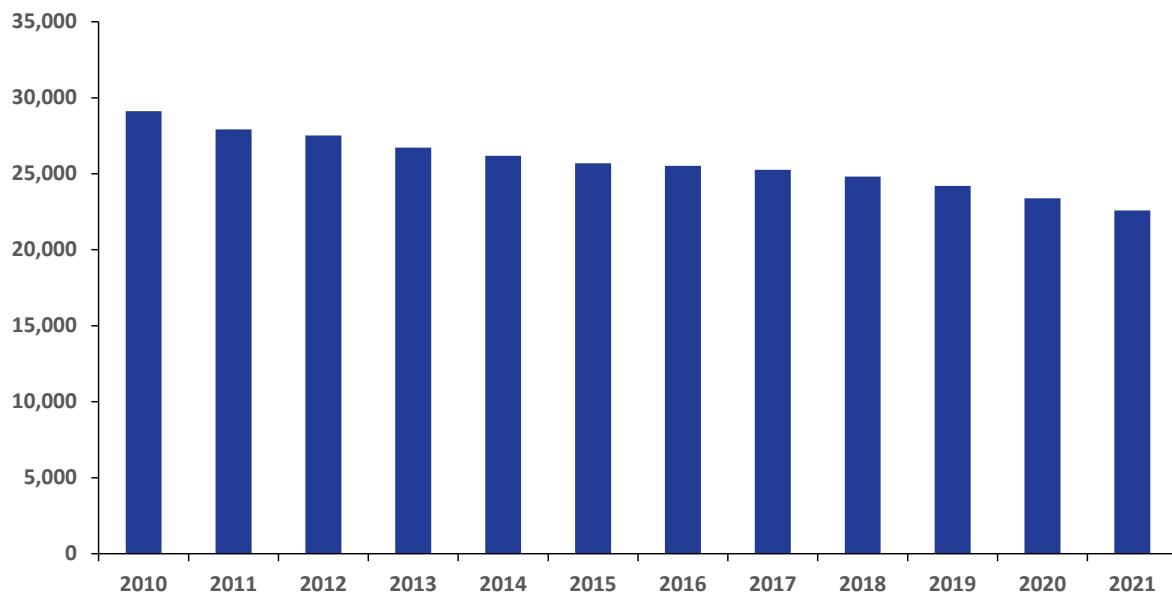
How Many Printers Are in the United States?

It seems like a pretty simple question: How many print service providers (PSPs) are there in the United States? The truth is that nobody really knows. The best anyone can do is take an educated guess based on a variety of data sources.

What Does the U.S. Government Say?

The U.S. government puts the number of PSPs somewhere between 22,000 and 23,000 as of 2021. This is based on recently released County Business Patterns data from the U.S. Census Bureau. The data confirms what most of us already know—there are fewer and fewer PSPs. According to the latest available data, the number of print industry establishments in the government’s Printing and Related Support Activities segment (North American Industry Classification System code 323) declined from 29,118 in 2010 to 22,580 in 2021. That’s a loss of 6,538 establishments, which represents a decline of over 20% compared to what existed in 2010. NAICS code 323 includes the subcategories of Commercial Printing, Screen Printing, Book Printing, and Support Activities for Printing.

Figure 1: Number of U.S. Printing Establishments – 2010-2021



Source: U.S. Census Bureau, County Business Patterns, 2021

The problem with these figures is that they do not paint a full picture of the printing that is happening around the nation.

What’s Missing?

A few broad categories are not included in NAICS code 323 for Printing and Related Support Activities. Some are counted by the government in whole or in part, but others slip through the cracks. These include:

- **In-plants:** In-plant print centers are part of many companies and organizations. One big category is in colleges and universities. The government’s category for that segment is NAICS 6113 (Colleges, Universities, and Professional Schools). According to the NAICS data, there are more than 4,000 of these sites, many of which are likely to have an in-plant facility for printing,

copying, and mailing. In addition, this category doesn't include the 22,000+ U.S. elementary and secondary school systems (NAICS 6111), the larger of which are likely to have their own printing and copying facilities. Education is just one example of an industry where in-plants may reside. In short, there are possibly as many as 8,000 to 10,000 in-plant print facilities (educational and corporate) in the United States. Some of these are run by facilities management (FM) organizations that take over the daily operation of the sites and handle their logistics.

- **Data centers:** There are more than 17,000 establishments in NAICS 5182 (Data Processing, Hosting, and Related Services). At least some of these sites are printing bills, invoices, and statements using high-speed digital printers.
- **Package printers:** NAICS 56191 (Packaging and Labeling Services) lists 1,681 sites providing these services.
- **Companies whose business includes printing, but whose NAICS category is something else:** Although there are others, two examples of this include FedEx Office and Staples. Whether the main company definition is in packaging and shipping or as a retail store, there are thousands of sites like these providing printing services in the U.S., often to individuals and small businesses.
- **Design services:** There are more than 15,000 establishments in NAICS 54143 (Graphic Design Services). Some of these will certainly offer their own printing capabilities. There are also firms operating exclusively online, like Moo, that consider their offerings more akin to design services than to printing. Even so, they do provide print services.
- **Printing on something other than paper:** Of course, not everything is printed on paper. The NAICS 313310 segment (Textile and Fabric Finishing Mills) accounts for more than 600 U.S. sites. This segment also does not include printing that takes place on wood, glass, metal, plastic, or other non-paper substrates. Those land in other manufacturing categories.

There are certainly other examples, but these uncounted (or partially counted) categories have the potential to add tens of thousands of sites to what might more accurately be described as the U.S. printing industry.

The Bottom Line

While it is true that the U.S. printing industry is much bigger than the ~22,500 establishments cited by the government within NAICS 323 (Commercial Printing, Screen Printing, Book Printing, and Support Activities for Printing), it is also clear that establishment declines in that sector are not fully balanced by gains in others. Industry consolidation is a given as electronic delivery of information continues to impact traditional print methods. That consolidation contributes to increased competition from unexpected places. A recent example of this is in the wide-format printing market, where traditional sign printers are seeing competition from commercial printers and in-plants that have added wide-format capabilities.

The PSPs that remain can no longer operate on old business models, which is why many are expanding the range of print services that they offer and are also branching out into adjacent service areas to meet their customers' needs. As an example, in the book printing market, savvy and digitally-minded PSPs are integrating their print-on-demand services with additional capabilities like warehousing and fulfillment that help them to integrate into publishers' distribution channels. Their customers benefit from being able to leverage their content more effectively.

Although I can't tell you how many printers there are in the United States, I can say this—the PSPs that remain face a very different competitive environment. This new environment requires fresh ways of thinking about the value that each provider delivers to its customers.

Source: Jim Hamilton, Consultant Emeritus at Keypoint Intelligence

Author bio: Jim Hamilton of [Green Harbor Publications](#) is an industry analyst, market researcher, writer, and public speaker. For many years, he was Group Director in charge of Keypoint Intelligence's (formerly InfoTrends') Production Digital Printing & Publishing consulting services. He has a BA in German from Amherst College and a Master's in Printing Technology from the Rochester Institute of Technology.