

Monthly Print Market Update

May, 2026



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Graphic Arts Employment in April Down Overall - Substantially Among Non-Production:

April 2026 saw printing industry employment overall generally flat, down 0.4% from March. And while production employment was up 0.6%, non-production employment was down by 2.5%—basically the reverse of what we saw in March.

Quad CFO Discusses Growth and Strategy on NYSE Live - In a May 6, 2026 appearance on NYSE Live, Quad Chief Financial Officer and Treasurer Tony Staniak outlined the company's progress toward long-term sustainable growth, highlighting the strength of Quad's integrated marketing model, and the data-driven capabilities helping to differentiate the company.

The interview follows Quad's latest earnings report, where the company emphasized disciplined execution alongside targeted investments designed to support sustainable growth as it transforms as a marketing experience company.

They're driving to cut underperforming operations and boost growing operations to achieve revenue balance in FY 2028.

The Wider View: Increasing Opportunity with Expanded Color Sets - Today's producers understand that CMYK will not earn you every flavor (or color) in the rainbow. Finding more flavors means developing an understanding of the rather granular ink offerings found in modern wide-format equipment.

For example, several wide-format OEMs offer expanded color sets including options like orange, violet, and green, which greatly increase the available gamut. This can be highly beneficial for companies seeking extremely high color quality.

Pretty basic stuff in our Commercial Print Color world. A short discussion around Color Sets and the Wide-format world.

AI Governance Is Moving Fast. Is the Printing Industry Ready? - Artificial intelligence continues to reshape how businesses operate, compete, and manage risk. At the International Association of Privacy Professionals (IAPP) Global Privacy Summit held in Washington, D.C. from March 30–April 2, 2026, one message came through clearly: AI governance is rapidly becoming a business requirement, not just a technology discussion.

Conversations throughout the summit focused on the accelerating pace of regulation, the emergence of agentic AI systems, evolving data and privacy concerns, and the growing need for organizations to establish practical governance structures that can keep pace with real-world adoption. For the printing and packaging industry, this shift matters now.

It's hard enough to keep up with the technology itself, but if you don't track the Governance issues, you'll be doing a lot of work....but perhaps not in the right way. Accountability is already there, with your customer and soon with the Regulators as well.

Five Shocking In-plant Statistics - The shift toward digital transformation and operational efficiency is moving faster than many in-plants realize:

- The Labor Cliff: A staggering 20% of the printing workforce is projected to disappear by 2030.
- The Legacy Trap: Over 40% of in-plants admit they are held back by "black box" legacy code.
- The Visibility Void: In-plants without automated mail tracking lose an average of 12% in operational efficiency due to manual status lookups and postal black holes
- The Diversification Payoff: There is a 15.6% revenue gap between shops that stick to traditional print and those that have pivoted to multi-channel communications.
- Efficiency as a Priority: Over 54% of in-plants cite "improving productivity" as their primary reason for upcoming tech investments

Well, here's the playbook on how to beat the In-plants!

Book Printing Establishments—2010–2023 - According to the latest edition of County Business Patterns, in 2023 there were 360 establishments in NAICS 323117 (Books Printing). This represents a decrease of 33% since 2010—although establishments were up from 2021 to 2022. In macro news, inflation in April grew 3.8% year-over-year.

Atlas must like seeing fewer competitors, that's why the book market is strong right now.

Well, This Isn't Good: January Shipments Lower Than Expected - 2026 kicked off with January shipments coming in at \$7.08 billion, down from December's \$7.19 billion. Not a very auspicious beginning to the year.

Certainly not a good start, but one month's data does not constitute a trend. Let's get some more info before we start projecting the tearly results.

Target Report: What in the World is Schutzschirmverfahren? – Exit, Consolidate, or Invest:

Despite the recent spate of numerous plant closures and total plant auctions, we do not see evidence of widespread company failures in the printing industry. Rather, recent transactional activity suggests something more structural at work. The industry is not collapsing; it continues to be sorted out by market forces as the demand for printed products changes.

Three distinct pathways are emerging: excess capacity is being wrung out of the system via company and plant closures, often outside formal restructuring processes; core mature print markets are continuously consolidating through many, sometimes small, local transactions; and capital continues to flow toward the growth segments, in particular packaging and digital print technologies, albeit at a

much slower pace than in previous years. Together, these dynamics are reshaping the printing and packaging industry from the inside out.

This article suggests that the M&A is more of a picture of consolidation and efficiencies, rather than distress and I agree, although you can make the case that narrow print is softer and slowing decreasing, especially compared to packaging, labels and wide-format, that are still growing.

Labor and the Workforce: 2026 and Beyond – Those trends are happening right now. But what trends should printers be planning for as we move deeper into 2026? Harrison sees a major shift from a focus on earning a college degree to moving right into a career.

“There is an increasing movement to go directly into the workforce from high school, or attend technical schools and community colleges rather than take on a four-year, white-collar degree,” she notes. “The perception is that the benefits of a bachelor’s degree do not outweigh the cost. Historically, this has not been true, but the high cost of student loan debt has changed the analysis so that the benefit is not realized until much later than it was in the past.”

This article dovetails nicely with the next article. This one about recruiting a new wave of employees and the next about transferring the knowledge base that is leaving.

The AI Urgency Conversation Is Right — But Print Has a Different Problem to Solve - There’s a conversation happening at the executive level right now that I think is exactly right in its urgency and exactly incomplete for our industry.

The framing goes something like this: AI fluency is no longer optional. The companies winning right now have made AI instinctive — not a tool employees use sometimes, but a reflex. Something leaders in this space are calling “AI DNA.” And the organizations that haven’t gotten there are falling behind fast, sometimes catastrophically.

That urgency is real. I believe it completely. But when I hear that conversation in the context of the printing and packaging industry, I find myself thinking about a different problem. Not the people who won’t adopt AI, but that the people who *have* been doing their jobs brilliantly for 25 years are about to retire.

This is an inflection point in our industry. The winners will be those that best manage the two-headed beast of integrating productive AI, as well as transitioning the knowledge base leaving. These are not 2 distinct practices, they are intensely linked.

Short-Staffed and Stretched Thin: The Budget Challenge Facing In-plants - In-plants are always fighting the budget battle.

They're on the hunt for new equipment and software. They are looking for ways to keep work in-house, which helps save money and boost quality for their parent organizations. And they are trying to maintain a top-performing, hardworking team.

All of this requires money — especially the people piece. According to the latest report from *In-plant Impressions*, 67% of in-plants with vacancies say they haven't filled those roles due to a hiring freeze or lack of budget to hire.

Extensive report on the struggles of Staffing an In-plant, most of which will be familiar to us all.

Fiery and Xerox Collaborate on Fiery FS700X Pro Platform - Fiery, LLC, the print industry's leading innovator of digital front ends (DFEs) and workflow software, announced the launch of the Fiery FS700X Pro platform. Custom-designed for Xerox and first introduced with the new Xerox Proficio PX500 and PX300 Production Presses, Fiery FS700X Pro is the result of close collaboration between Fiery and Xerox, combining industry-leading DFE and color expertise with world-class production print technology.

Much of this article is Marketing in nature, but it shows that Xerox is partnering Fiery to bring better solutions to market for Xerox devices and especially regarding better color management.

Graphic Arts Employment in March Up Overall—Substantially Among Non-Production - March 2026 saw printing industry employment overall generally flat, up 0.3% from February. And while production employment was down 0.8%, non-production employment was up by 2.9%.

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What They Think – May 29

Graphic Arts Employment in April Down Overall

Substantially Among Non-Production

April 2026 saw printing industry employment overall generally flat, down 0.4% from March. And while production employment was up 0.6%, non-production employment was down by 2.5%—basically the reverse of what we saw in March.

Employment in thousands of workers	March 2025	March 2026	Y/Y Change	April 2025	April 2026	Y/Y Change
Printing, all	345.5	341.2	-1.2%	345.3	339.8	-1.6%
Printing, production	238.2	234.2	-1.7%	238.1	235.5	-1.1%
Printing, less production	107.3	107.0	-0.3%	107.2	104.3	-2.7%
Signs, all	77.1	76.8	-0.4%	77.2		
Signs, production	42.8	40.1	-6.3%	43.0		
Signs, less production	34.3	36.7	7.0%	34.2		
Converted paper products	271.8	275.0	1.2%	272.1		
Paperboard containers	159.1	159.5	0.3%	159.6		
Paper bags and coated and treated paper	54.1	54.9	1.5%	53.7		
Stationery and other converted paper products	58.6	60.6	3.4%	58.8		
Plastics packaging materials, film, and sheet	100.4	100.2	-0.2%	99.6		
Publishing	904.4	896.3	-0.9%	901.5	891.6	-1.1%
Newspaper, periodical, book, and directory publishers	255.2	239.5	-6.2%	255.1		
Newspaper publishers	84.9	77.8	-8.4%	84.7		
Periodical publishers	62.1	57.4	-7.6%	61.9		
Book publishers	54.5	54.3	-0.4%	54.4		
Directory, mailing list, and other publishers	53.7	50.0	-6.9%	54.1		
Graphic design services	54.7	52.0	-4.9%	51.2		
Advertising and related services	479.8	477.9	-0.4%	480.4	479.7	-0.1%
Advertising agencies	209.3	203.4	-2.8%	208.1		
Public relations agencies	62.9	60.5	-3.8%	62.5		
Media buying agencies and media representatives	34.7	34.9	0.6%	35.4		
Display advertising	30.2	28.9	-4.3%	30.4		
Direct mail advertising	31.6	29.9	-5.4%	30.8		
Advertising material distribution and other advertising services	111.1	120.3	8.3%	113.2		

We kicked off 2026 with a 2.7% decrease in overall industry employment in January, and thus we were happy that February employment was generally flat. In March, overall employment remained generally flat, being up only 0.3%. In April, we again remained relatively flat overall—down 0.4% from March—with production employment up 0.6% and non-production employment down by 2.5%, essentially the reverse of what we saw in March.

Publishing employment was down 0.5% from March to April, again the reverse of what we saw in March.

Looking at other business categories, the reporting of which lags a month:

Overall employment in the signage industry was flattish from February to March, with sign production employment down 2.7% and non-production up 1.9%.

Converted paper products employment was up 0.9% from February to March, with paperboard container employment up 0.8% and paper bags and coated and treated paper employment up 0.4%.

Looking at some specific publishing and creative segments, from February to March, periodical publishing employment was down 1.7%, newspaper publishing employment was down 0.4%, and book publishing was down 0.7%. Graphic design employment was up 2.2%, ad agency employment was down 0.1%, and PR agency employment was down 0.8%. Direct mail advertising employment was down 0.7% from February to March.

As for March employment in general, it was not particularly encouraging. The [BLS reported](#) on May 8:

Total nonfarm payroll employment edged up by 115,000 in April, and the unemployment rate was unchanged at 4.3 percent, the U.S. Bureau of Labor Statistics reported today. Job gains occurred in health care, transportation and warehousing, and retail trade. Federal government employment continued to decline.

The U-6 rate (the so-called “real” unemployment rate which includes not just those currently unemployed but also those who are underemployed, marginally attached to the workforce, and have given up looking for work) increased from 8.0% to 8.2%.

The labor force participation rate decreased slightly from 61.9% to 61.8% and the employment-to-population decreased from 59.2% to 59.1%. The labor force participation rate for 24–54-year-olds was unchanged at 83.8%.

The revisions this time were pretty mild:

The change in total nonfarm payroll employment for February was revised down by 23,000, from -133,000 to -156,000, and the change for March was revised up by 7,000, from +178,000 to +185,000. With these revisions, employment in February and March combined is 16,000 lower than previously reported.

This was not a bad jobs report and was well above the consensus forecast of 75,000 jobs added. Still, the economy has only added 251,000 jobs over the last year, which is starting to worry some labor watchers.

Printing Impressions – May 27

Quad CFO Discusses Growth and Strategy on NYSE Live

In a May 6, 2026 appearance on NYSE Live, Quad Chief Financial Officer and Treasurer Tony Staniak outlined the company's progress toward long-term sustainable growth, highlighting the strength of Quad's integrated marketing model, and the data-driven capabilities helping to differentiate the company.

The interview follows Quad's latest earnings report, where the company emphasized disciplined execution alongside targeted investments designed to support sustainable growth as it transforms as a marketing experience company.

Key takeaways from the interview:

Continuing progress toward revenue inflection point

Staniak noted that Quad is continuing to reduce the impact of declines in legacy areas of the business, while building growth across new offerings. "We have some parts of our business that have organic decline each year, but that decline is getting less and less as we make our way towards our revenue growth inflection point in 2028," Staniak said.

Audience targeting, data and scale create unique advantage

Staniak highlighted Quad's unique position in the direct mail ecosystem and the data insights that help power more effective marketing for clients. "Ten percent of all mail originates at Quad, when you take out first-class letters and packages. Through that, we know a lot about [consumers] and can deliver very effective campaigns right where they'll get the most response."

Integrated solutions and client centricity differentiate Quad

According to Staniak, clients increasingly value coordinated campaigns that connect creative, media, print and digital execution. "What we've seen is that an omnichannel campaign is what works best," Staniak said. "We can go all the way from creative through execution – digital or print – and media placement. We're excited about delivering that full suite of services."

[Source: Quad](#)

Printing Impressions – May 26

The Wider View: Increasing Opportunity with Expanded Color Sets



By [Dan Marx](#)

To an outsider, wide-format printing devices seem to be, more or less, the same. The three best known “flavors” of printers — roll-to-roll, hybrid, and flatbed — create a “three scoop sundae.” And while certainly delicious in its potential for opportunity, that does not by itself include all the “toppings” available through ink choices. Okay, enough with the ice cream metaphor.

Today’s producers understand that CMYK will not earn you every flavor (or color) in the rainbow. Finding more flavors means developing an understanding of the rather granular ink offerings found in modern wide-format equipment.

For example, several wide-format OEMs offer expanded color sets including options like orange, violet, and green, which greatly increase the available gamut. This can be highly beneficial for companies seeking extremely high color quality.

An example of where greater color quality is needed is for countertop point-of-purchase cosmetics displays: The flesh tones must be correct, and because they are viewed close-up, the ability to produce subtle tonality shifts is paramount. The expectation is that the print should look photographic.

Another common example is the accurate printing of brand colors that fall outside of what CMYK can provide. Examples include Tiffany blue (Pantone 1837), Coca-Cola red (Pantone 484 or 485), and Barbie pink (Pantone 219).

Most of us can picture these colors in our mind, and as a result, most of us can tell (or sense) when the color is incorrect. The use of expanded color, in these cases, not only enables producers to match the color (within expectation); it also puts them in contention for business that relies on hard-to-reach hues.

Neon colors have also been having a moment. While many think of neon as the realm of the groovy black-light posters of the 1970s, neon and fluorescent colors can be used to expand potential gamut. Their ability to fluoresce enables prints to glow or pop in subtle and/or visually striking ways. Clear, jettable coatings can be used in a variety of applications as well, including the creation of gloss and matte finishes, the production of subtle textures, and spot-varnish effects. Used thoughtfully, this option enables enhancement of all or part of the printed surface, either to add additional “pop” to colors or to embellish the print in ways that increase value and differentiate the work from producers without the capability.

Finally, opaque white ink — it was once somewhat of a novelty and now it’s widely used, particularly on flatbed printers. This ink enables printing on non-white substrates by creating an opaque white base. Because of the white base, process colors (CMYK or expanded) can be used on top of them without being subject to color shift from the color of the substrate upon which it is printed. While white ink is generally used in this way, producers, in collaboration with designers, are now also using it to create multi-layer effects, or to produce double-sided prints on, for instance, transparent acrylic. This is another example of how possessing a capability can open opportunities for unique, potentially higher-value work.

All this said, simply having these capabilities on your shop floor does not guarantee your profitability in using them. That aspect — successful integration — will be addressed in next month’s column.

Wide-format Impressions – May 20

AI Governance Is Moving Fast. Is the Printing Industry Ready?

In this article, Amy Servi-Bonner, Vice President, PRINTING AI, and Stephanie Buka, Government Affairs Manager, PRINTING United Alliance, reports on AI governance in the printing industry. More information can be found at [PRINTING AI](#) or reach out to Amy directly if you have additional questions specific to how these issues may affect your business: aservi@printing.org.

Artificial intelligence continues to reshape how businesses operate, compete, and manage risk. At the International Association of Privacy Professionals (IAPP) Global Privacy Summit held in Washington, D.C. from March 30–April 2, 2026, one message came through clearly: AI governance is rapidly becoming a business requirement, not just a technology discussion.

Conversations throughout the summit focused on the accelerating pace of regulation, the emergence of agentic AI systems, evolving data and privacy concerns, and the growing need for organizations to establish practical governance structures that can keep pace with real-world adoption. For the printing and packaging industry, this shift matters now.

AI is no longer a future-facing concept reserved for experimentation. It is increasingly becoming embedded into day-to-day business operations across print and packaging organizations, including workflow automation, estimating, customer communications, production planning, cybersecurity, scheduling, quality control, and data-driven decision-making.

At the same time, the regulatory environment surrounding AI continues to evolve quickly. In 2025 alone, more than 1,000 AI-related bills were introduced across U.S. state legislatures, alongside increasing federal attention on privacy, cybersecurity, transparency, and accountability. International frameworks such as the EU AI Act are also influencing how global organizations evaluate risk, vendor relationships, and operational oversight.

The direction is becoming clear. Organizations using AI will increasingly be expected to understand how systems are being applied, document decision-making processes, evaluate vendors responsibly, oversee data usage, and establish safeguards around business-critical applications.

For print and packaging companies, these issues are not theoretical.

AI tools are already being applied in environments that directly impact customer relationships, operational performance, workforce productivity, intellectual property, and business continuity. Whether used to optimize schedules, assist with hiring, generate content, analyze production data, or strengthen cybersecurity, these systems introduce both opportunity and responsibility.

One of the strongest themes from the summit was simple: waiting for the landscape to stabilize is not a strategy.

Many organizations already have AI capabilities operating inside tools employees use every day. In many cases, adoption is occurring faster than governance. The risk is not simply the technology itself. The risk is operating without visibility, ownership, accountability, or operational guardrails.

That is why governance must become practical, operational, and ongoing.

Effective governance is not a static policy sitting in a binder. It is a living operational discipline that helps organizations understand:

- where AI is being used,
- what decisions it influences,
- who owns oversight,
- what data is involved,
- when human review is required, and
- when systems should be reassessed as workflows, vendors, or business conditions evolve.

A framework discussed repeatedly throughout the summit can be summarized in three actions: map, measure, and manage.

Organizations should map where AI exists across the business, including embedded capabilities inside vendor platforms and workplace productivity tools. They should measure risk based on operational impact, particularly where AI may influence customer communications, employee workflows, pricing, production, cybersecurity, or business decision-making. Finally, they should manage those risks through clear ownership, vendor accountability, documented processes, human oversight where appropriate, and reassessment triggers as systems evolve.

This is exactly where PRINTING United Alliance is helping the industry move from awareness to operational readiness.

Through [PRINTING AI](#), the Alliance is building a practical, vendor-neutral framework to help print and packaging organizations understand, evaluate, govern, and responsibly implement AI technologies within real production environments.

The focus is not hype. The focus is operational reality.

That includes helping organizations identify where AI can create measurable business value, where governance is required, where workforce readiness gaps exist, and where cybersecurity, compliance, and customer trust considerations must be addressed before scaling adoption.

As part of this initiative, the Alliance launched the [AI Readiness Benchmark](#), an online assessment designed specifically for print and packaging organizations. The benchmark provides companies with a practical starting point for evaluating operational preparedness, governance maturity, data readiness,

security considerations, leadership alignment, and organizational risk awareness related to AI adoption.

More importantly, it helps companies begin asking the right operational questions before implementation accelerates.

The AI Readiness Benchmark reinforces the Alliance's role as the industry's trusted, vendor-neutral authority on emerging technology adoption and business transformation.

This work extends far beyond a single assessment tool.

PRINTING AI includes a growing ecosystem of educational resources, industry research, webinars, [iLEARNING+ courses](#), enablement services, and in-person experiences designed to help members move from exploration to responsible production-level execution.

Members will also be able to experience these initiatives firsthand at the PRINTING AI Pavilion during [PRINTING United Expo](#), taking place September 23–25, 2026, at the Las Vegas Convention Center. The Pavilion will showcase how AI is being applied across real print and packaging workflows while providing attendees with practical insight into operational use cases, governance considerations, cybersecurity implications, workforce enablement, and responsible adoption strategies.

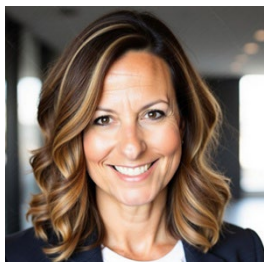
As AI becomes more deeply integrated into customer communications, production systems, and operational infrastructure, responsible technology practices are becoming competitive differentiators, not simply compliance exercises.

The takeaway for print and packaging companies is straightforward: AI adoption should be intentional, informed, and operationally governed.

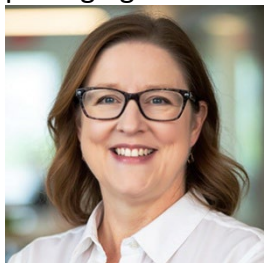
Organizations do not need to solve every challenge immediately. But they do need visibility into where AI already exists, a realistic understanding of the associated risks and opportunities, and a practical roadmap for strengthening readiness over time.

AI will continue to reshape the business landscape for the printing industry. Through PRINTING AI and the AI Readiness Benchmark, the Alliance is helping members navigate those changes responsibly, strengthen operational resilience, and position their organizations for long-term success.

For more information about PRINTING AI and the AI Readiness Benchmark, visit [PRINTING AI](#).



Amy Servi-Bonner is the Vice President, Printing AI. With over 25 years of experience in technology leadership and consulting, Servi-Bonner brings deep expertise in ERP systems, digital transformation, and AI strategy. She holds an Executive Degree in AI Strategy and Governance from the Wharton School at the University of Pennsylvania, as well as an MBA in Finance from Webster University. Her combination of technical acumen, consulting background, and knowledge of the printing and packaging sector uniquely positions her to guide companies through the next era of transformation.



Stephanie Buka is the Government Affairs Manager for PRINTING United Alliance. In this role, she supports Ford Bowers, CEO, the Government Affairs team, and coordinates efforts with contracted lobbying firm, ACG Advocacy. Buka is the chief editor of the Industry Advocate newsletter. She is responsible for advocacy campaigns, policy analysis, strategy development and team leadership, all aimed at promoting the Alliance's legislative agenda. She is also responsible for the administration of the Alliance's political action committee, PrintPAC.

In-plant Impressions - May 15

Five Shocking In-plant Statistics



Katelin Shanks

The shift toward digital transformation and operational efficiency is moving faster than many in-plants realize, notes Katelin Shanks, manager of sales and marketing at [Racami](#), a multi-national software and IT services company focused on improving customer communication processes and advancing multi-channel initiatives. She lists five shocking statistics regarding the current state of in-plants:

- **The Labor Cliff:** A staggering 20% of the printing workforce is projected to disappear by 2030. With two million jobs vanishing, automation is no longer a luxury. It is the only way to keep the lights on
- **The Legacy Trap:** Over 40% of in-plants admit they are held back by "black box" legacy code. This undocumented, aging tech is now cited as the No. 1 barrier to moving to the cloud and staying secure
- **The Visibility Void:** In-plants without automated mail tracking lose an average of 12% in operational efficiency due to manual status lookups and postal black holes
- **The Diversification Payoff:** There is a 15.6% revenue gap between shops that stick to traditional print and those that have pivoted to multi-channel communications. Doing "more of the same" is officially a declining strategy.
- **Efficiency as a Priority:** Over 54% of in-plants cite "improving productivity" as their primary reason for upcoming tech investments, as the overall industry sees a slim 0.6% increase in standard sales

"These trends point to something we are all starting to see from different sides of the industry," says Shanks. "The in-plant is no longer just a service department. It is becoming the digital backbone of the organization."

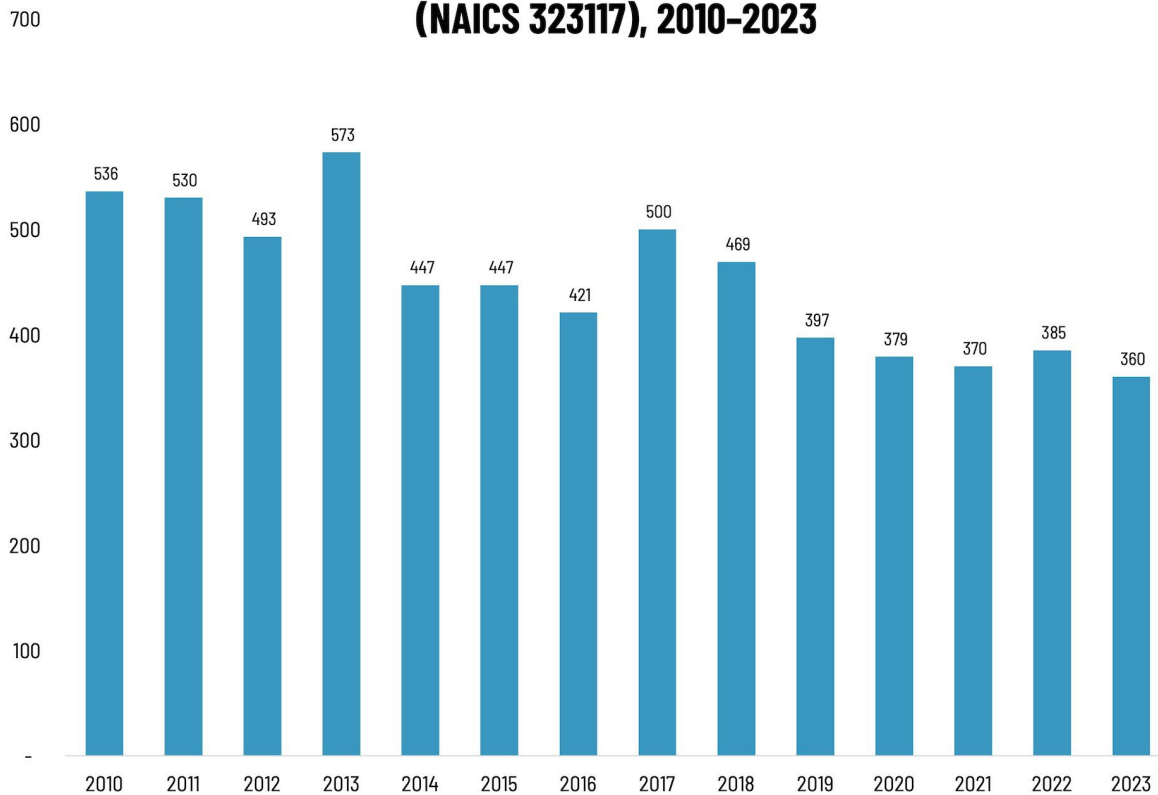
What They Think – May 15

Book Printing Establishments—2010–2023

According to the latest edition of County Business Patterns, in 2023 there were 360 establishments in NAICS 323117 (Books Printing). This represents a decrease of 33% since 2010—although establishments were up from 2021 to 2022. In macro news, inflation in April grew 3.8% year-over-year.

As 2023 began, there were 360 establishments in NAICS 323117 (Books Printing). This represents an decrease of 33% since 2010, although there was a growth of 15 establishments from 2021 to 2022.

**US Commercial Book Printing Establishments
 (NAICS 323117), 2010–2023**



The Bureau of the Census definition for this business classification:

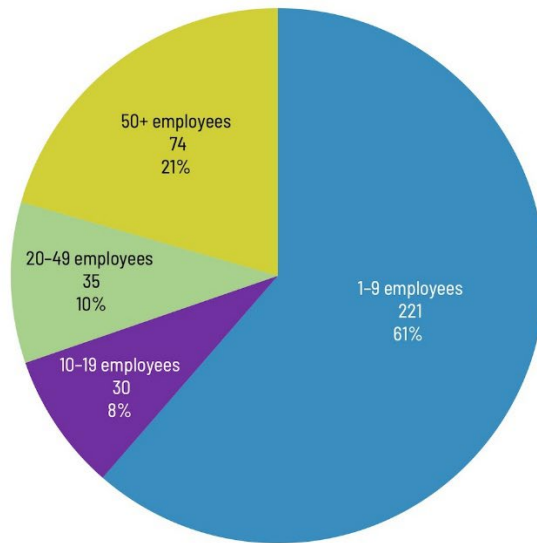
This U.S. industry comprises establishments primarily engaged in printing or printing and binding books and pamphlets without publishing.

You can see that book printing establishments were up and down throughout the decade, the ebbing and flowing in this business category reflecting the old story of consolidation as well as the results of both shop diversification and specialization. Today’s equipment (production inkjet in particular) can

produce a variety of print products, so shops don't have to stick to any one particular niche the way they used to. So some quantity of "book printers" may not consider themselves just book printers, and thus they classify themselves as general commercial printers or some other business category that better describes what they do. It also goes in the other direction: books have remained a perennially popular print product—especially during and since the pandemic lockdown—and as more book production moves to the digital on-demand variety, it can be a significant niche to pursue all on its own. Books also lend themselves to more dedicated workflows (highly integrated text printing, cover printing, binding, shipping) so it often makes sense to dedicate production solely to books, especially if the volume is there.

Unlike other printing categories, book printing establishments are not as concentrated at the lower end of the employee-count spectrum. Small shops (1 to 9 employees) still comprise the bulk of the book printing industry, but only account for 61% of all establishments. The largest shops account for one-fifth (21%) of industry establishments with mid-size shops also accounting for 18% of establishments.

Number of US Commercial Book Printing Establishments (NAICS 323117), 2023



These counts are based on data from the Census Bureau's *County Business Patterns*. Throughout this year, we will be updating these data series with the latest *CBP* figures. *County Business Patterns* includes other data, such as number of employees, payroll, etc. These counts are broken down by commercial printing business classification (based on NAICS, the North American Industrial Classification System):

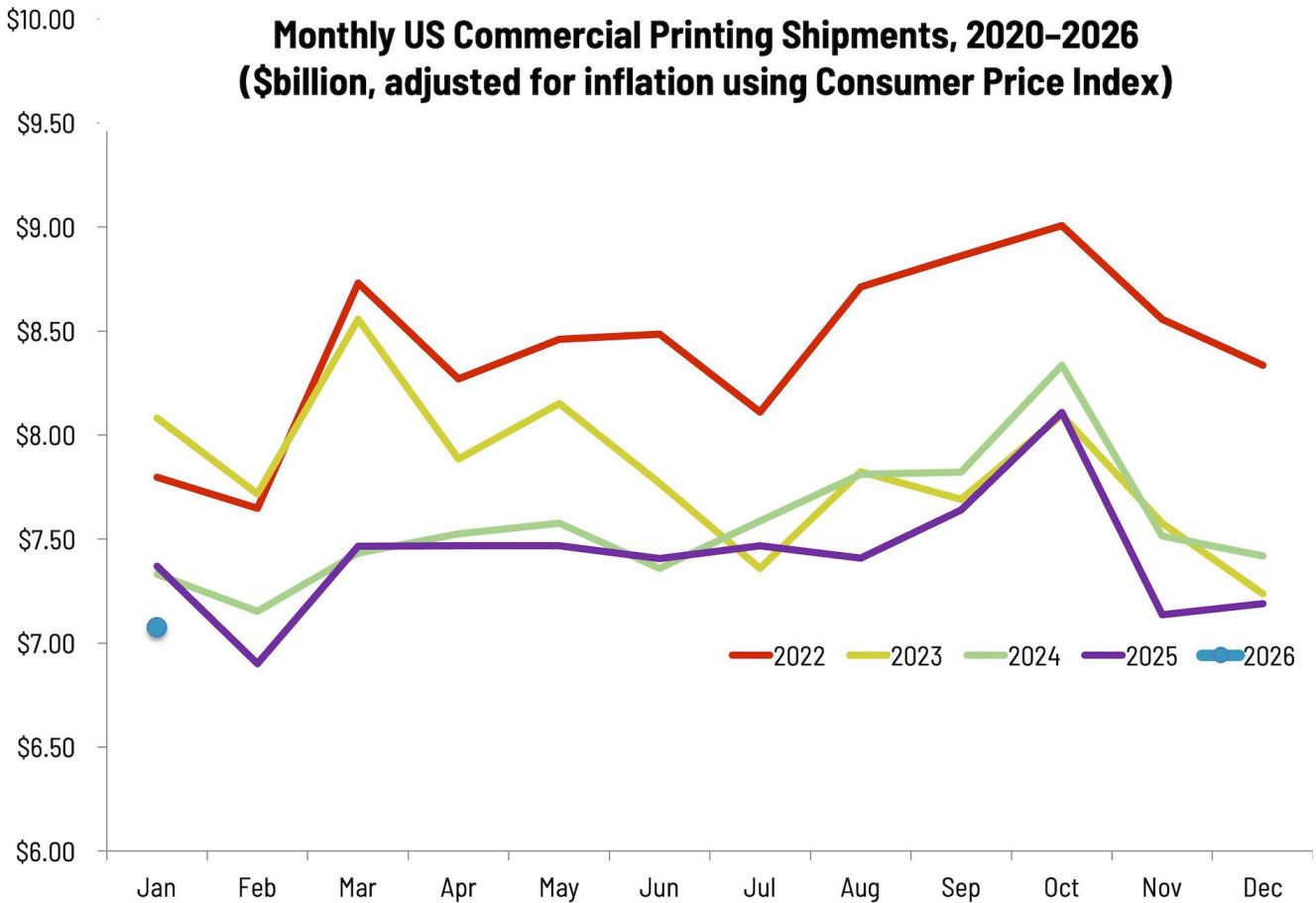
- 32312 (Support Activities for Printing—aka prepress and postpress services)

What They Think – May 8

Well, This Isn't Good: January Shipments Lower Than Expected

2026 kicked off with January shipments coming in at \$7.08 billion, down from December's \$7.19 billion. Not a very auspicious beginning to the year.

Friday, May 08, 2026



Well, this doesn't bode well. We kicked off 2026 with January printing shipments coming in at \$7.08 billion, down from December's \$7.19 billion. And indeed that is the worst January since at least 2013—and likely ever. Given our usual seasonality, we're dreading February's numbers.

2025 had its challenges macroeconomically—specifically, the tariffopalooza—and now the Iran War, which is raising the cost of oil, thus gas (the [national average cost](#) of a gallon of gas is currently \$4.50, up from \$3.20 a year ago), and thus everything that uses gas (shipping, for example) is also up. Since many items other than gas also are shipped through the embattled Strait of Hormuz, a prolonged war will disrupt supply chains, and we all remember from 2022 what happened when supply chains got

disrupted. In our just-released [Printing Outlook 2026–27](#), “pricing pressures and price erosion” was our survey respondents’ number one challenge, with “national economic conditions” a close second and geopolitical issues were of greater concern in this survey than in the history of our Outlook reports.

At the same time, as we mentioned last week, GDP growth for the past two quarters has been sluggish and while the employment situation looks OK at present, inflation is also on the rise. Not to raise the specter of Dr. Doom, but we may be in for a very rough year.

Wide-format Impressions – May 6

Target Report: What in the World is Schutzschirmverfahren?



By [Mark Hahn](#)

The following article was originally published by [Printing Impressions](#). To read more of their content, subscribe to their newsletter, [Today on PIWorld](#).



Schutzschirmverfahren (*shüts- ,shir-m fär- 'fä-rän*): a German word literally translated as “Protective Shield Proceedings,” but in practical terms, it is the German equivalent of a self-administered, court-supervised proceeding under Chapter 11 of the US Bankruptcy Code.

Exit, Consolidate, or Invest

Despite the recent spate of numerous plant closures and total plant auctions, we do not see evidence of widespread company failures in the printing industry. Rather, recent transactional activity suggests something more structural at work. The industry is not collapsing; it continues to be sorted out by market forces as the demand for printed products changes.

Three distinct pathways are emerging: excess capacity is being wrung out of the system via company and plant closures, often outside formal restructuring processes; core mature print markets are continuously consolidating through many, sometimes small, local transactions; and capital continues to flow toward the growth segments, in particular packaging and digital print technologies, albeit at a much slower pace than in previous years. Together, these dynamics are reshaping the printing and packaging industry from the inside out.

Wrung Out - Manroland Sheetfed Files Bankruptcy

One of the most highly respected manufacturers of printing equipment, [Manroland Sheetfed](#), entered into bankruptcy proceedings in Germany under that country's Insolvency Code, which provides the option for management to retain control of the company while restructuring, rather than being replaced by a court-appointed administrator.

The Manroland press line traces its origin back to 1844 in Augsburg, Germany, and has been associated with many innovations throughout its long history. The company initially focused on producing steam engines, but within a couple of decades had expanded into manufacturing printing presses. In 1875, the company introduced the *Albatross Press*, which produced up to 700 sheets per hour, a very productive rate for a sheetfed press ("Albatross" clearly had a different, more positive connotation at the time). The company came into its own in 1911 with the introduction of its first sheetfed offset press. Another milestone was achieved in 1951 when the company introduced the 4-color sheetfed *Ultra* press at Drupa, revolutionary at the time for its "planetary cylinder" design, which enabled full-color printing in one pass through the press.

The company progressed over the following decades with a convoluted series of mergers. The 1979 merger with the MAN Group brought web press production into the company. To gain entry into the US market, the company marketed its presses under the brand name Miele-Roland, piggybacking on the reputation of Miele presses.

Manroland, with both sheetfed and web press manufacturing under its belt, churned through several ownership structures: corporate enterprise, foreign, and private equity. Following its first insolvency filing in 2012, the company emerged from that restructuring as two separate entities, Manroland Sheetfed, embracing sheetfed technology, under the umbrella of UK-based Langley Holdings. The legacy web press business was purchased by Possehl Group, a German industrial conglomerate, eventually merging it with Goss International to form Manroland Goss. (See [The Target Report: Press Onward! - March 2018](#)).

We may be seeing the end of the sheetfed branch of the Manroland family of printing presses. The CEO of Langley Holdings was quoted in the company's review as saying, "The situation at Manroland Sheetfed is unsustainable." The company's restructuring expert noted that they "will have to implement drastic and far-reaching measures" and that it "is regrettable that a great many jobs will be lost." Over the past couple of decades, much of the packaging market has shifted to Koenig & Bauer (KBA) for its very-large-format offset presses. Komori has made significant inroads into the commercial market for high-speed automated offset presses. Heidelberg has held its ground in both the commercial and packaging markets. Given these market trends, we will not be surprised if Manroland Sheetfed exits the manufacture of printing presses and is consigned to simply servicing its legacy of installed machines.

Consolidation as the Default Path

The most visible activity in March was the steady cadence of small and mid-sized acquisitions across commercial printing. These were not transformative platform deals or private equity-backed roll-ups. Instead, they were overwhelmingly local, strategic tuck-ins, transactions driven by geography, customer overlap, and operational efficiency.

BP Print Group's acquisition of [PrintFast Marketing Solutions](#) in New Jersey, Andrick & Associates' tuck-in of Target Graphics in Florida, and PackEdge's purchase of Keno Graphics in Connecticut, all follow a similar pattern: buyers and sellers operating in the same regional markets, combining to improve utilization and retain customer relationships. At the lower end of the market, consolidation via tuck-in transactions provides owners with a graceful exit path as the commercial printing industry volume slowly declines.

Franchise and network operators continue to play an important role in this consolidation dynamic. The Minuteman Press in Kalamazoo, Michigan, acquired local company JB Printing. In Iowa, the North Liberty franchise purchased Goodfellow Printing. The Allegra Marketing Print Mail franchise in Baltimore expanded its footprint by acquiring the Image360 franchise location in downtown Baltimore. These transactions demonstrate how franchise organizations now act as aggregation vehicles for many smaller, independent printers. The franchisors' model: local ownership combined with broader branding and operational support, positions the franchise systems to absorb sub-scale competitors and attract entrepreneurial entrants into the printing industry.

Notably absent from the month's activity were large-scale commercial print platform acquisitions. There were no multi-state roll-ups and no significant private equity entries into traditional print. The lack of headline transactions suggests that growth expectations are not driving consolidation, but rather that consolidation is occurring by necessity. For many operators, acquisition is less about expansion and more about survival: adding volume, improving equipment utilization, and maintaining relevance in increasingly competitive local markets while at the same time removing a competitor from the playing field. In the current market, consolidation is happening at the edges, not on a large scale, at least not yet.

Investment Flows Toward Packaging and Technology

In contrast to the fragmented and largely local nature of commercial print M&A, capital deployment in packaging and enabling technologies continues to occur at scale and with strategic intent. Altamont Capital Partners' investment in [Key Container Corporation](#) reflects ongoing private equity interest in corrugated packaging, despite reports that demand for corrugated boxes has declined following a systemic reset after the post-Covid period, as well as online retailers shifting to paper bags and envelopes as more cost-effective carriers.

Similarly, CCL Industries' \$113 million (USD) acquisition of [Sleeve International](#) underscores the strategic, long-term value of packaging companies, in this case, shrink-sleeve production. Consistent with the deal discipline that CCL has shown in the past, the multiple paid was 6.4x adjusted EBITDA.

(See [The Target Report: CCL Industries Breaks the Rules – January 2022](#)). This multiple is not only a sign of CCL’s approach but moreover is indicative of the cooling off of the red-hot market for packaging companies, even allowing that shrink sleeves were not as hot as labels and flexible packaging. Even more striking among the deal metrics revealed was that net tangible assets are expected to represent 90% of the purchase price, leaving just 10% to be allocated to goodwill.

An Industry Being Sorted

Taken together, the March data does not portray an industry in crisis, nor is it indicative of a booming business for print and packaging companies. It describes an industry being sorted. Three pathways are becoming increasingly distinct. As is the case with many of the closures noted in our deal log, and as may be the case with Manroland Sheetfed, when the headwinds are too strong, some fold up their tent and close up shop. Consolidation is reshaping core print markets as local operators combine to remain viable, with the survivors absorbing work from exiting companies. And finally, investment is still flowing into packaging, labels, and digital print technologies, the industry segments aligned with growth, and attracting capital.

2025 March - Mergers and Acquisitions in the Printing, Packaging, Paper & Related Industries										
Deal Party #1 (Surviving Entity)	Pre-Deal Revenue (USDMM)	Party #1 Address	Deal Party #2	Pre-Deal Revenue (USDMM)	Party #2 Address	Date Deal Public	Deal Value (USDMM)	Deal Structure (Intermediary)	Notes	Press Links
BP Print Group	No Data	Lakewood, NJ	PrintFast Marketing Solutions	No Data	Middlesex, NJ	3/31/25	No Data	Acquisition (Sipke Arts Advisors)	Commercial print & marketing	Link
Paxon Media Group	No Data	Peacock, KY	The Franklin Press (48 titles) (Prop. Community Newspapers)	No Data	Athens, GA	3/21/25	No Data	Acquisition (Birks, Van Esen)	Community newspapers	Link
Algebra Marketing Print-Mall	No Data	Baltimore, MD	Image360 Baltimore Downtown	No Data	Baltimore, MD	3/31/25	No Data	Acquisition	Wide-format & signage	Link
Andrick & Associates	No Data	Sarasota, FL	Target Graphics	No Data	Sarasota, FL	3/20/25	No Data	Acquisition	Commercial printing	Link
PackEdge	No Data	Hamden, CT	Kero Graphics	No Data	Shelton, CT	3/26/25	No Data	Acquisition	Commercial printing	Link
Minsterian Press Kalamazoo	No Data	Kalamazoo, MI	JP Printing	No Data	Kalamazoo, MI	3/25/25	No Data	Acquisition	Printing & copying	Link
Graphco Mgmt Team	No Data	Cleveland, OH	Graphco	No Data	Cleveland, OH	3/24/25	No Data	Acquisition	Equipment distributor	Link
Michigan Independent Media Group	No Data	Grand Rapids, MI	Tri-City Times	No Data	Inlay, MI	3/21/25	No Data	Acquisition	Community newspaper	Link
Continuum (Div. CR Group)	No Data	Brainerd, MN	Teldon	No Data	Richmond, BC	3/23/25	No Data	Acquisition	Specialty printed products	Link
CCL Industries	\$7,640	Toronto, ON	Sleeve International	\$198.7	Paris, France	3/11/25	\$112.5	Acquisition	Shrink sleeve labels	Link
Brand Boost Prints	No Data	Spokane Valley, WA	Lithograph Reproductions	No Data	Spokane Valley, WA	3/12/25	No Data	Acquisition	Commercial printing	Link
Global Printing and Packaging	No Data	Martinezburg, MA	Rocketbook	No Data	Lee, MA	3/10/25	No Data	Acquisition	Notebooks	Link
AlphaGraphics North Liberty	No Data	North Liberty, IA	Goodwill Printing	No Data	Iowa City, IA	3/5/25	No Data	Acquisition	Printing & copying	Link
Altamont Capital Partners	No Data	Palo Alto, CA	Key Container	No Data	Pawtucket, RI	3/5/25	No Data	Acquisition	Corrugated boxes & displays	Link
Pillman Partners & Reinsella Partners	No Data	Greenwich, CT	Printware	No Data	Eagan, MN	3/3/25	No Data	Acquisition	Inkjet presses	Link

2025 March - Bankruptcy Filings in the Printing, Packaging, Paper & Related Industries										
Filing Party	Date Case Filed	Pre-Petition Revenue (USDMM)	Case #	Filing Party Address	Circuit	Region & City	Judge	Attorney for Debtor	Notes	
Chapter 11 Filings:										
More Than A Printer Inc.	3/13/25	No Data	25-30664	Louisville, KY		Western KY Louisville	Joan A. Lloyd	Michael W. McClain	Commercial printing	
Chapter 7 Filings:										
No Chapter 7 Filings Found this Month										
Germany Insolvency Proceeding:										
Manroland - Sheetfed Division (Sub Langley Holdings)	3/3/25	\$300.0	N/A	Offenbach am Main, Germany	N/A	N/A	N/A	N/A	Printing press manufacturing	

2026 March - Non-Bankruptcy Closures in the Printing, Packaging, Paper & Related Industries									
Closed Company / Facility	Date of Closure	Pre-Closure Revenue (US\$M)	Closing Address	Related Party	Related Party Address	Date Closure Public	Notes	Press	Links
Ace Lithographers of Morris County (dba Ace Tail)	4/30/26	No Data	Berkeley Heights, NJ	None	N/A	Mar-26	Commercial printing (Merger with Associates International)		Link
BR Printers - Book printing plant	6/26/26	No Data	Cincinnati, OH	BR Printers	San Jose, CA	3/27/26	Book printing & manufacturing		Link
King Printing	3/31/26	No Data	New Tazewell, TN	None	N/A	3/27/26	Commercial printing		Link
QC Direct Mail	2/28/26	No Data	Marietta, GA	None	N/A	3/5/26	Mailing services & digital printing		Email Notice
Lifetouch - Printing facility (Div. Shutterfly)	10/16/26	No Data	Galion, OH	Lifetouch	Redwood City, CA	3/5/26	Photobooks and specialty products		Link
Star Litho	4/30/26	No Data	Weymouth, MA	None	N/A	3/5/26	Commercial printing		Link

[View The Target Report online, complete with deal logs and source links for March 2026](#)

Printing Impressions – May 5

Labor and the Workforce: 2026 and Beyond



Credit: Getty Images



By [Toni McQuilken](#)

The labor market has always been one of push and pull, give and take, and ups and downs. Some years, there are more jobs than people to fill them, and others, more people seeking than actual positions to fill. For the past few years, the industry has been in the first scenario, trying — and often failing — to find new people to fill open positions. But that is starting to shift, due to a few factors.

“In many areas of the country, the past decade or more, employers have been scrambling to fill positions” Adriane Harrison, vice president of human relations consulting at PRINTING United Alliance, says. “In 2026, there may be less turnover as fewer people leave their jobs because they perceive economic uncertainty. Also, more people are looking for manufacturing and other non-office jobs. All of this should mean more good candidates open to recruitment and applying for positions.”

Jules VanSant, who is chairperson of the Print and Graphics Scholarship Foundation (PGSF), partner at Bubble & Hatch, and executive director at Two Sides North America, has been seeing the same trend starting to take shape.

“This last year, there’s been a lot of pause, a lot of uncertainty,” VanSant notes. “There’s been caution in hiring, caution in letting people go, just seeing what you could do with what you had. And these times have happened in the past, where instead of getting excited about investing in new talent, you’re kind of pulling back and only filling if you really need to. I think with the mergers and acquisitions that continue to happen, there’s a lot of movement in labor as well, with people that are experienced [being displaced].”

And that’s not just in the printing industry. Harrison stresses, “For instance, UPS cut [48,000] jobs in 2025, and recently announced another 30,000 jobs cuts in 2026. Amazon is cutting 30,000 jobs. The first round was 14,000 in the fourth quarter of 2025, and the second round is coming soon. This is the tip of the iceberg — there will be a lot of large companies scaling back their workforces. This is a real opportunity for our industry. We can offer careers — not just jobs — for some of these displaced workers.”

And that’s especially important as the wage gap continues to get wider. VanSant points out that every year, more and more workers are retiring, taking with them institutional knowledge. But at the same time, technologies are changing so rapidly, that perhaps that knowledge isn’t as valuable as it was in the past. As new employees enter the space, they bring trust in and capability with technology that older generations may struggle to keep up with.

At the same time, every successful printer needs experienced people who understand print at a fundamental level to ensure everything works well together; having a bunch of presses and people working without considering the processes before or after them translates to inefficiencies, low quality, and mistakes. A stronger workforce can be built by balancing younger generations’ keenness to learn with the experience of older generations who cut their teeth on plates and offset presses. “In my previous lives, when I worked at a flexo free press and platemaking facility, we went from manual film stripping, and everyone in that department needed to either learn how to use a computer or they didn’t have a job anymore,” VanSant says. “And a lot of them were like, ‘I don’t want to go there.’”

“I think this is a different time, but it’s a similar situation where people that work on big presses are now being asked to work on something that’s really more digitally driven. It’s a different world, right? Do they want to learn something like that? And do you need that level of expertise now, with some of the software incorporated into these pieces of equipment? Or do you need somebody who’s a good communicator, who learns quickly, who’s physically capable?”

Planning for the Future

Those trends are happening right now. But what trends should printers be planning for as we move deeper into 2026? Harrison sees a major shift from a focus on earning a college degree to moving right into a career.

“There is an increasing movement to go directly into the workforce from high school, or attend technical schools and community colleges rather than take on a four-year, white-collar degree,” she notes. “The perception is that the benefits of a bachelor’s degree do not outweigh the cost. Historically, this has not been true, but the high cost of student loan debt has changed the analysis so that the benefit is not realized until much later than it was in the past.”

Harrison continues, “Companies can capitalize on this movement by creating relationships with high schools, technical schools, and community colleges in their area. Participate in internship programs and if they don’t exist at your local schools, work with the schools to create them. Offer for your executives to speak to business classes. Donate time, money, and materials to programs at these schools. Sponsor facility tours.”

Training is also a big takeaway. VanSant emphasizes that because more employees are entering the workforce directly from high school, training is more important than ever.

“I deal a lot with college and university programs, as well as trade schools, and you see a lot of the basics being taught, but it’s still a struggle to think about from screen to production,” VanSant says. “There’s a lot of ways that people can consume information. I know the iLEARNING+ platform at PRINTING United Alliance is a great place for employers or schools to tap in and get some virtual learning, which is awesome, except it really doesn’t resonate until you’re in the thick of it. I don’t care what career path you go on, you really have to kind of start getting your hands into it.”

That follows from advice from top trainers who suggest people learn one of three ways: by hearing about something, by watching something, or by doing something. A great training program, therefore, caters to all three.

For example, a shop could have an iLEARNING+ subscription for staff that allows a new hire to take a few “101” and other relevant courses virtually. Then, they could transition into a role shadowing a mentor for a set period of time, learning workflows and how the equipment works and asking questions. Finally, the new hire can take over the work and get comfortable with the equipment while the mentor observes and offers advice when needed.

“Training matters,” Harrison stresses. “It communicates to your employees that you believe that they are a worthwhile investment. Building their skills tells them that they have a future — a career — at the company and that they aren’t in a dead-end job. Structured mentoring programs work because they create relationships and offer a safe person that a new employee can go to with questions.

Hands-on training works, and online training also works, but make sure that the employee then has an opportunity to put the online training into action.”

“You can’t just have one or the other,” VanSant agrees. “I think the buddy system, having a mentor internally, getting a champion who’s willing to have somebody side by side — having those kinds of programs always seemed very successful, where you have people go from department to department and you have a culture that people are supportive of that.”

And what about retaining that talent once they have been hired and trained? Having a competitive salary is always going to be a factor, but — perhaps surprisingly — it’s not always the first or even most important thing people are looking for today.

“Create a great work environment — and get your leadership team to build trust with the employees so they feel like they have a stable job and steady hands leading the company.” Harrison notes. “There is an old saying that people don’t quit their jobs, they quit their managers. This is very true in many cases.

Companies often put people into management positions based on their hard skills, but do not train them on the soft skills managers need. We need to prepare our supervisors and managers by providing training on communication, how to build trust, problem-solve, show empathy without being a pushover, do difficult things like discipline employees, and how to create a friendly relationship with their team without crossing appropriate boundaries.”

For VanSant, flexibility is still crucial. “I know that we’ve seen that kind of shifting back to an on-site work situation — which I think there’s a lot of benefits culturally to that — but that being said, have some flexibility with the schedule. Unless you’re hardcore in the production side, offering that flexibility is really important to this generation, respecting that they’ll get the work done without needing to create such a structure that they don’t have room to breathe. This is a creative industry, and these days, everything is changing so rapidly, you need people who can think creatively and who can adjust. If you put them in too much of a restrictive situation, you’re not tapping into that. And they will walk because it will become ... overwhelming and [create] burnout.”

Hiring and retaining talent is a fluid thing. What works one year, or with one generation, won’t necessarily work with the next. Taking the time to evaluate those practices and make adjustments to keep pace with the expectations of the workforce is absolutely critical. The printing industry can’t attract the best — or keep them — if it doesn’t offer a competitive and attractive environment job seekers will be drawn to. Understanding the trends and accounting for them annually will help ensure the people not only come, but stay.

Printing Impressions – May 5

The AI Urgency Conversation Is Right — But Print Has a Different Problem to Solve



By [Amy Servi-Bonner](#)

There's a conversation happening at the executive level right now that I think is exactly right in its urgency and exactly incomplete for our industry.

The framing goes something like this: AI fluency is no longer optional. The companies winning right now have made AI instinctive — not a tool employees use sometimes, but a reflex. Something leaders in this space are calling “AI DNA.” And the organizations that haven't gotten there are falling behind fast, sometimes catastrophically.

That urgency is real. I believe it completely.

But when I hear that conversation in the context of the printing and packaging industry, I find myself thinking about a different problem. Not the people who won't adopt AI, but that the people who *have* been doing their jobs brilliantly for 25 years are about to retire.

Because when they go, they take everything with them.

This Isn't Just a Print Shop Problem

The knowledge crisis I'm describing doesn't stop at the pressroom door. It runs the entire length of the print and packaging value chain.

At the OEM level, it's the senior field service engineer who knows exactly how a specific press behaves in high-humidity environments — knowledge that no service manual captures. The application specialist who has spent two decades helping customers push equipment to its limits and knows which configurations actually work in production versus which ones only work in demos.

At the supplier and distributor level, it's the rep who has 30 years of substrate knowledge in her head: which papers run beautifully on which heads, which coatings cause problems at speed, which substitutes actually hold up when a primary goes on backorder. The account manager who knows the buying patterns, the real decision-makers, and the unwritten rules of every major account relationship. At the print and packaging operation level, it's the senior estimator who knows which clients always underestimate quantities and which jobs have hidden complexity baked into the spec. The lead press operator who can diagnose a registration problem by sound before it ever shows up in quality inspection. The color specialist who knows when to trust the ICC profile and when to override it. The scheduler who has internalized years of capacity exception logic and customer prioritization judgment that has never been written down anywhere.

Across every one of these entities, the pattern is the same: The knowledge that creates competitive advantage lives in people, not systems. And those people are aging out.

The Scale of What's at Risk

The average age of a skilled technical professional in the printing and packaging industry is climbing. The cost of losing one high-tenure person — across recruiting, ramp-up time, productivity loss, and the errors a less experienced person makes while learning — routinely runs one to two times their annual salary. And that's before you account for the client relationships, the institutional memory, and the operational instincts that simply cannot be transferred in an offboarding meeting.

Roughly 80% of the critical knowledge in a typical print operation has never been formally documented. Not because people were careless. Because it was never the kind of knowledge that fit in a manual. It's judgment. It's pattern recognition. It's the diagnostic sequence that saves two hours because someone learned it the hard way, years ago.

That knowledge took decades to build. And right now, across this industry — at the OEM, at the supplier, at the distributor, on the shop floor — it is walking out the door.

A Different Kind of AI Problem

The broader AI adoption conversation focuses on getting people to use AI — building the habit, the fluency, the instinct. That's a culture and change management problem, and it's a legitimate one. Our industry has that problem, too. But layered underneath it is something more urgent and far less discussed: *What happens to the knowledge those people carry when they leave?*

This is the problem I call knowledge sovereignty. And it is the one the print and packaging industry has the narrowest window to solve.

Knowledge sovereignty is the state in which your organization's most critical institutional knowledge is owned, preserved, and deployed internally — as AI that works alongside your human team, trained on your people, running in your systems, permanently.

Not vendor-dependent. Not platform-dependent. Not person-dependent.

An AI employee is not a chatbot that answers generic questions. It's not a document repository dressed up with a chat interface. It's a role-specific AI trained on a specific person's actual knowledge — their decision frameworks, their exception logic, their pattern recognition — and assigned to every human in that operational role. Available every shift. Every location. Regardless of who you can hire. When your best field service engineer retires, the AI employee he helped build carries his diagnostic judgment forward. When a new sales rep joins your distribution team, they have immediate access to 30 years of account and substrate knowledge. When the labor market tightens — and it will — your operation runs at full capability regardless.

That is not a technology product. That is a structural advantage.

The Window Is Open Now

Here's what I tell every organization I work with across this industry: The knowledge capture window is open right now, and it will not stay open.

Before the retirement announcement, you have access to the person, their full cooperation, and the time to do this right. Knowledge capture can be conversational and thorough, designed to surface what has never been written down, because no one thought to ask.

After the announcement, you have weeks, not months. Capture is rushed. The person is already mentally checked out. This is where most organizations find themselves: scrambling through someone's last two weeks.

After they leave, the window is closed. Whatever wasn't captured is gone. You are now paying to reconstruct it through trial, error, and expensive mistakes. And that reconstruction never quite gets there, because the person who would have told you what you were missing is no longer there to tell you.

The DNA Worth Preserving

The conversation about AI fluency as instinct — as something woven into how an organization operates — is the right conversation. In print and packaging, I'd push it one step further. AI DNA in our industry has to mean that your organization's institutional intelligence is captured before it retires, codified before it's lost, and deployed as AI that works every shift and gets smarter over time.

It has to mean that the knowledge advantage you've built over decades doesn't disappear when the people who built it walk out the door.

The question isn't whether you can afford to do this. It's whether you can afford not to. That knowledge took decades to build. The work of preserving it starts with one person. One role. One organization.

In-plant Impressions – May 1

Short-Staffed and Stretched Thin: The Budget Challenge Facing In-plants



By [Kalie VanDewater](#)

In-plants are always fighting the budget battle.

They're on the hunt for new equipment and software. They are looking for ways to keep work in-house, which helps save money and boost quality for their parent organizations. And they are trying to maintain a top-performing, hardworking team.

All of this requires money — especially the people piece. According to the latest report from *In-plant Impressions*, 67% of in-plants with vacancies say they haven't filled those roles due to a hiring freeze or lack of budget to hire.

The No. 2 reported reason for vacancies? Employees are leaving for other opportunities. Without a full staff, in-plants are seeing heavier workloads, slower turnaround times, increased overtime, and even dips in production quality. An understaffed in-plant is one with compounding operational issues — and that means its parent organization isn't getting the support it needs. To determine what's working for in-plants on the staffing front, we asked shops — both fully staffed and hiring — to share their staffing struggles, retention and hiring practices, and what they're doing to fill the staffing gap.

[Download the exclusive "In-plant Staffing Practices and Trends" report](#) to learn more about how your in-plant can strengthen your workforce and your capabilities.

Printing Impressions – April 30

Fiery and Xerox Collaborate on Fiery FS700X Pro Platform



Fiery, LLC, the print industry's leading innovator of digital front ends (DFEs) and workflow software, announced the launch of the Fiery FS700X Pro platform. Custom-designed for Xerox and first introduced with the new Xerox Proficio PX500 and PX300 Production Presses, Fiery FS700X Pro is the result of close collaboration between Fiery and Xerox, combining industry-leading DFE and color expertise with world-class production print technology. By simplifying job setup, reducing downtime, and delivering consistent, premium output, Fiery FS700X Pro helps Xerox clients run smoother production and capture more profitable work.

Built for smart operations and real production lines

Fiery FS700X Pro is based on the cutting-edge Fiery FS700 Pro platform, enabling print teams to run with confidence on a resilient, secure foundation built for high-production environments.

- Never get blindsided with production costs thanks to Fiery Smart Estimator, helping teams quote with confidence by understanding production costs up front.
- Avoid time spent fixing issues with Easy Vitals and the Job Progress Light, offering built-in visual alerts and health monitoring that allow operators to catch issues sooner and stay ahead of problems before they arise.
- Reduce manual steps with exclusive Fiery JobExpert presets that provide custom-tuned settings to help operators get faster output without constant tweaking.
- Tailor workflows to suit business needs with either Fiery or Xerox workflow options, giving teams the flexibility to build fully integrated, scalable ecosystems that fit each business' unique requirements and growth goals.

Color that just works — and opens the door to higher-value projects

Fiery FS700X Pro helps teams spend less time fine-tuning color and more time producing high-value work that directly benefits the bottom line.

- Empower operators of all skill levels with exclusive, co-developed features like Xerox PredictPrint Media Manager and Xerox EZ Color Check technology that combine with Fiery 1-step color management and Zero-touch recalibration to deliver hands-free, automated media

setup and color management — making it easier than ever for anyone to achieve reliable, repeatable color with fewer rejected jobs.

- Deliver high-margin color projects with 10-bit imaging, Fiery Edge technology, and Delta E linearization across all calibration methodologies to ensure output meets the highest client expectations — achieving rich detail, smooth gradients, and accurate color across both CMYK and extended gamut applications.
- Easily meet strict brand standards with specialty color and embellishment management and custom-tuned output profiles, letting print teams confidently produce the premium color and extended-gamut work that increases profit margins.

“Fiery FS700X Pro is the result of strong collaboration between Fiery and Xerox to create a platform that provides outstanding results for the Xerox Proficio series,” said John Henze, Vice President, Sales and Marketing, Fiery. “Partnerships like this are a key component of Fiery’s industry leadership, and we’re proud to showcase the Fiery FS700X Pro as an example of how we can work together with press manufacturers to provide the strongest technology results to print providers. Whether it’s the advanced operational resilience that keeps production lines up and running, effortless media setup and color management for operators of any skill level, or brand-critical extended gamut work, print businesses can rely on Fiery FS700X Pro to deliver the production power, color quality, and higher-profit jobs they need to help their businesses succeed.”

“Xerox is focused on helping print providers simplify operations and accelerate profitable growth,” said Terry Antinora, President, Global Production Print Services, Xerox. “With Fiery FS700X Pro, exclusively designed for the Xerox Proficio series, we are redefining expectations for what a print server should deliver. By combining Xerox innovation with Fiery industry-leading technology we are enabling intelligent automation, precise and consistent color control, and the reliability required for high-value applications. The result is less complexity, faster turnaround, and more opportunities for growth.” Fiery FS700X Pro is available with the Xerox Proficio PX500 and PX300 presses sold by your local Xerox dealer. For more information, check out Fiery’s product pages for the PX500 and PX300.

[Source: Fiery](#)

What They Think – April 30

Graphic Arts Employment in March Up Overall—Substantially Among Non-Production

March 2026 saw printing industry employment overall generally flat, up 0.3% from February. And while production employment was down 0.8%, non-production employment was up by 2.9%.

Friday, April 24, 2026

Employment in thousands of workers	February 2025	February 2026	Y/Y Change	March 2025	March 2026	Y/Y Change
Printing, all	346.5	339.8	-1.9%	345.5	340.8	-1.4%
Printing, production	238.6	236.3	-1.0%	238.2	234.3	-1.6%
Printing, less production	107.9	103.5	-4.1%	107.3	106.5	-0.7%
Signs, all	75.8	77.2	1.8%	77.1		
Signs, production	41.9	41.2	-1.7%	42.8		
Signs, less production	33.9	36.0	6.2%	34.3		
Converted paper products	272.5	272.5	0.0%	271.8		
Paperboard containers	160.8	158.2	-1.6%	159.1		
Paper bags and coated and treated paper	53.3	54.7	2.6%	54.1		
Stationery and other converted paper products	58.4	59.6	2.1%	58.6		
Plastics packaging materials, film, and sheet	100.3	100.1	-0.2%	100.4		
Publishing	902.2	893.6	-1.0%	904.4	897.9	-0.7%
Newspaper, periodical, book, and directory publishers	255.6	241.1	-5.7%	255.2		
Newspaper publishers	84.8	78.1	-7.9%	84.9		
Periodical publishers	61.6	58.4	-5.2%	62.1		
Book publishers	55.3	54.7	-1.1%	54.5		
Directory, mailing list, and other publishers	53.9	49.9	-7.4%	53.7		
Graphic design services	52.0	50.9	-2.1%	51.7		
Advertising and related services	482.5	478.5	-0.8%	479.8	473.3	-1.4%
Advertising agencies	210.2	203.7	-3.1%	209.3		
Public relations agencies	64.0	61.0	-4.7%	62.9		
Media buying agencies and media representatives	35.2	35.3	0.3%	34.7		
Display advertising	30.2	29.1	-3.6%	30.2		
Direct mail advertising	31.6	30.1	-4.7%	31.6		
Advertising material distribution and other advertising services	111.3	119.3	7.2%	111.1		

We kicked off 2026 with a 2.7% decrease in overall industry employment in January, and thus we were happy that February employment was generally flat. In March, overall employment remained generally flat, being up only 0.3%, and while production employment was down 0.8%, non-production employment was up by 2.9%.

Publishing employment was up 0.5% from February to March.

Looking at other business categories, the reporting of which lags a month:

Overall employment in the signage industry was flat from January to February, with sign production employment up 0.5%, and non-production unchanged.

Converted paper products employment was up 0.2% from January to February, with paperboard container employment down 0.5% and paper bags and coated and treated paper employment up 2.8%.

Looking at some specific publishing and creative segments, from January to February, periodical publishing employment was down 2.2%, newspaper publishing employment was up 0.9%, and book publishing was down 0.9%. Graphic design employment was up 0.4%, ad agency employment was up 0.3%, and PR agency employment was up 0.7%. Direct mail advertising employment was up 0.7% from January to February.

As for March employment in general, it was not particularly encouraging. The [BLS reported](#) on April 3: Total nonfarm payroll employment increased by 178,000 in March, and the unemployment rate changed little at 4.3 percent, the U.S. Bureau of Labor Statistics reported today. Job gains occurred in health care, in construction, and in transportation and warehousing. Federal government employment continued to decline.

The U-6 rate (the so-called “real” unemployment rate which includes not just those currently unemployed but also those who are underemployed, marginally attached to the workforce, and have given up looking for work) increased from 7.9% to 8.0%.

The labor force participation rate decreased from 62.1% to 61.9% and the employment-to-population decreased from 59.3% to 59.2%. The labor force participation rate for 24–54-year-olds decreased from 83.9% to 83.8%.

The revisions this time were pretty mild:

The change in total nonfarm payroll employment for January was revised up by 34,000, from +126,000 to +160,000, and the change for February was revised down by 41,000, from -92,000 to -133,000. With these revisions, employment in January and February combined is 7,000 lower than previously reported.

This was not a bad jobs report and was well above the consensus forecast of 50,000 jobs added.