BPIF

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UK PRINTING FACTS & FIGURES

BRITISHPRINT.COM

ABOUT US

BPIF RESEARCH

BPIF research continually monitors and assesses the performance of the printing industry.

Our experienced research unit undertakes a considerable amount of primary and secondary research, specifically relating to the print industry and the sectors within. We are also actively engaged in promoting a wide range of industry relevant research from other organisations we collaborate with.

This provides our members with the latest information, data, trends and insights, allowing them to make better, more informed and future focused decisions for their business. The BPIF's dedicated industry research also helps us to represent the print industry to Government and other industry stakeholders.

UK PRINTING FACTS & FIGURES

Print plays a vital role in today's economy. Using data from a wide range of official sources, the BPIFs UK Printing Facts & Figures brochure covers the structure of our industry by region and product, as well as highlighting its considerable economic importance and productivity. It also demonstrates the effectiveness and sustainability of print as a modern communication medium.

UK Printing Facts & Figures is part of our ongoing programme of representational activity, directed toward educating and influencing Government agencies, politicians, parliamentarians, public servants and other organisations, whose decisions impact our member companies' interests, to make sure they understand that print plays a vitally important role in the performance of UK plc, and has huge economic significance nationally.

We'd also encourage you to use it to spread the word about the power and positives of the print industry, both with internal teams and external audiences, including your customers.

PRINT PLAYS A VITAL ROLE IN TODAY'S ECONOMY.

CONTENTS

WHAT IS PRINTING?

Source: Two Sides, twosides.info

IT'S ALMOST IMPOSSIBLE TO IMAGINE A WORLD WITHOUT PRINT. IT'S ALL AROUND US AND PLAYS A VITAL ROLE IN OUR DAILY LIVES.

PRINT IS LARGELY PRODUCED USING SUSTAINABLE MATERIALS.

It is predominantly paper-based, over 90% of the European paper industry's wood fibre originates from Europe, with 73% of wood and 90% of market pulp coming from forest management certified sources - which are growing by over 1,500 football pitches every day! Printing companies are at the forefront of improvements in environmental performance in manufacturing, with high levels of take-up for both the ISO 14001 environmental management standard and for FSC and PEFC chain of custody accreditations.

PRINT IS HIGHLY EFFECTIVE

It provides the means to communicate 'messages' easily, quickly and at a low cost.

PRINT HAS IMPACT

It is creative, it engages, it is versatile and it is persuasive.

PRINT HAS LONGEVITY AND AUTHORITY

It is tactile and offers a 'real world' experience. It has a unique ability to grab and hold people's attention. In fact, no other media channel can offer this combination of qualities.

PRINT IS AN IMPORTANT VEHICLE FOR ADVERTISING, EDUCATION, ENTERTAINMENT AND INFORMATION

It serves all parts of the UK economy - including central and local government, financial services, retailing, distribution, travel and tourism and manufacturing industries.

PRINT IS AN ADVANCED MANUFACTURING SECTOR

It utilises cutting-edge information and production technologies.

PRINT CAN BE INTERACTIVE AND INTEGRATED

The use of augmented reality, printed electronics and near-field communications offers the opportunity to increase the engagement between consumers and brands and enhance the effectiveness of marketing campaigns.

ECONOMIC IMPORTANCE

Source: BPIF analysis of ONS data for 2024; National Print Markets, Smithers - data for 2024, www.smithers.com;
Number of McDonalds, McDonalds, corporate.mcdonalds.com

£13.7 BILLION
TURNOVER

£5.9 BILLION
GROSS VALUE ADDED

93,000
PEOPLE EMPLOYED

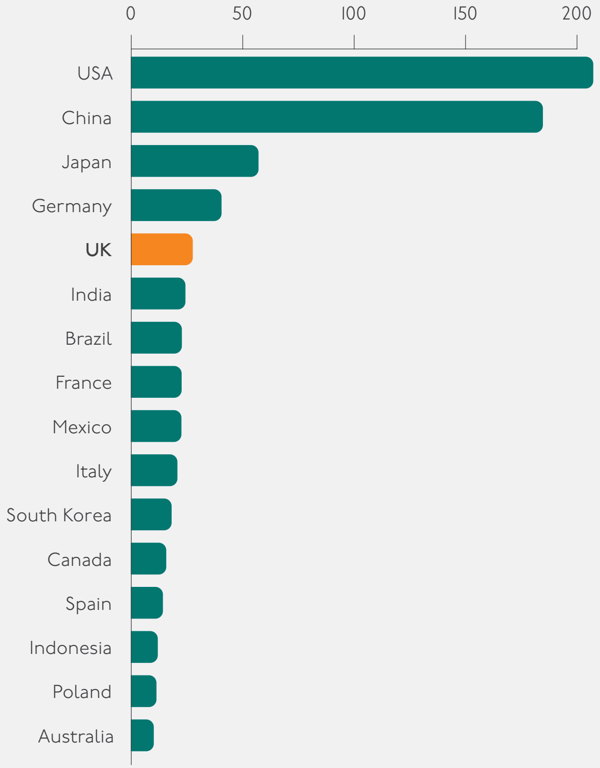
6,800
COMPANIES

WITH A TURNOVER OF £13.7 BILLION, GROSS VALUE ADDED OF £5.9 BILLION AND EMPLOYING AROUND 93,000 PEOPLE IN 6,800 COMPANIES, THE UK PRINTING INDUSTRY REMAINS AN IMPORTANT ECONOMIC CONTRIBUTOR AND EMPLOYER IN ALL UK REGIONS.

The UK is the fifth largest producer of printed products in the world, and second largest in Europe. Printed matter contributed £708 million to the UK's balance of trade in 2024.

There are more printing companies in the UK than there are McDonalds in Western Europe.

LARGEST NATIONAL PRINT MARKETS
2024 VALUE $ BILLION



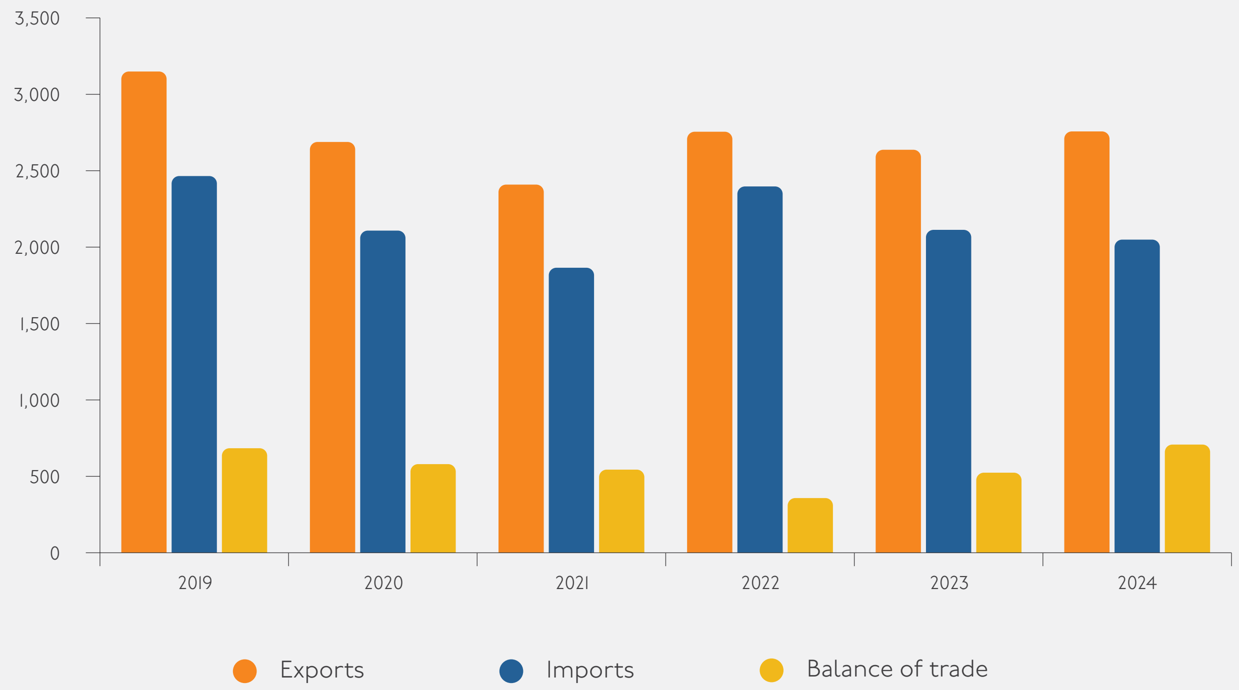
THE UK IS THE FIFTH LARGEST PRODUCER OF PRINTED PRODUCTS IN THE WORLD.

TRADE IN PRINT

International turbulence, the economic disturbance from COVID-19, and the post-Brexit transition have been challenges for overseas trade. The value of imports and exports of printed products both fell by around 15% in 2020, and a further 10% in 2021. Both exports and imports grew strongly in 2022, then declined in 2023. Exports subsequently recovered in 2024, though imports declined a little further. In 2024, exports to the EU exceeded non-EU exports for the first time since 2020.

- The UK is a big exporter of printed products - to the value of almost £2.8 billion in 2024.
- The UK is also a large importer of printed products - over £2.0 billion in 2024.
- This trade data means that the UK printing industry still has a positive contribution to the UK's trade balance - £708 million in 2024. The trade balance in 2024 was higher than in any year since 2018.
- The book sector forms the main component of UK trade in printed matter - in 2024 exports of books were valued at over £1.5 billion and imports of books were around £0.8 billion.

OVERSEAS TRADE IN PRINTED MATTER
£MILLION 2019-2024



Note: the data refers to trade in printed matter - in many cases it may not be the printing company doing the exporting but their client or a publisher.
Source: BPIF Research analysis of HM Revenue and Customs data.

REGIONAL UK PRINTING

Source: BPIF analysis of ONS data for 2024

UK PRINTING - 2024
COMPANIES, EMPLOYMENT AND TURNOVER BY REGION

PRINTING IS IMPORTANT IN ALL UK REGIONS.

NORTH EAST
Companies 200
Employment 4,109
Turnover £623m

NORTH WEST
Companies 700
Employment 9,387
Turnover £1,360m

YORKSHIRE AND THE HUMBER
Companies 623
Employment 12,226
Turnover £1,860m

EAST MIDLANDS
Companies 645
Employment 10,945
Turnover £1,708m

WEST MIDLANDS
Companies 574
Employment 6,557
Turnover £859m

EAST
Companies 788
Employment 11,068
Turnover £1,487m

LONDON
Companies 861
Employment 8,249
Turnover £1,150m

SOUTH EAST
Companies 1,039
Employment 11,651
Turnover £1,893m

SOUTH WEST
Companies 662
Employment 8,147
Turnover £1,154m

WALES
Companies 240
Employment 3,674
Turnover £647m

SCOTLAND
Companies 340
Employment 4,705
Turnover £624m

NORTHERN IRELAND
Companies 146
Employment 2,091
Turnover £310m

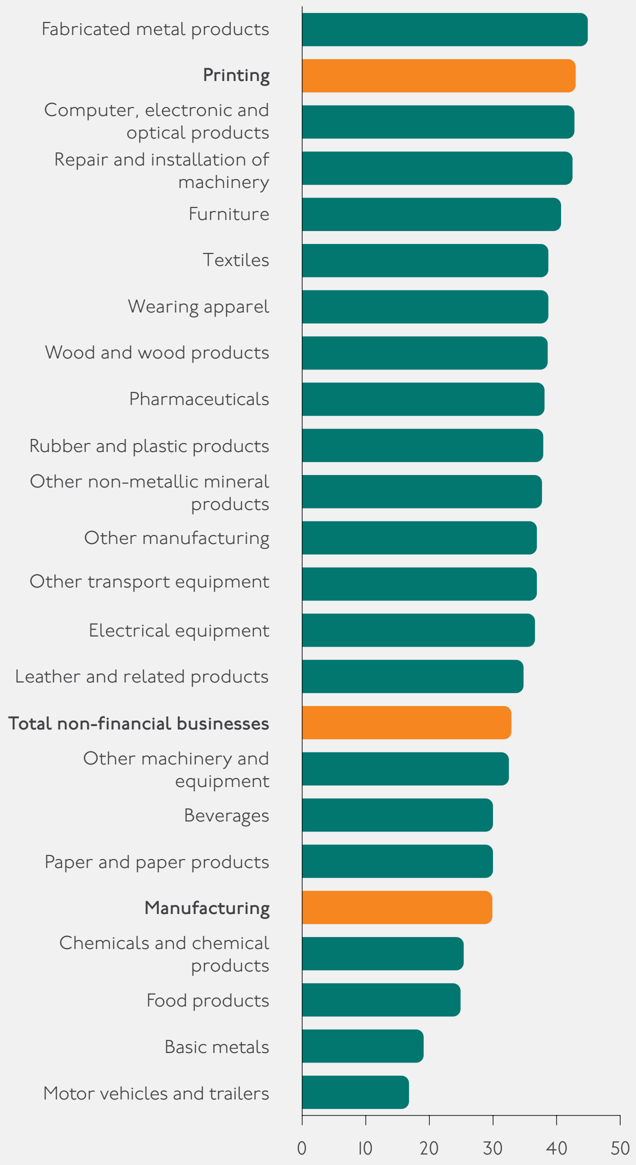
ENGLAND
Companies 6,092
Employment 82,339
Turnover £12,094m

UK
Companies 6,818
Employment 92,809
Turnover £13,700m

VALUE ADDED IN PRINT

Source: ONS, ons.gov.uk

PRINTING ADDS RELATIVELY MORE VALUE THAN ALMOST ALL MANUFACTURING INDUSTRIES
GVA (GROSS VALUE ADDED) AS A % OF TURNOVER

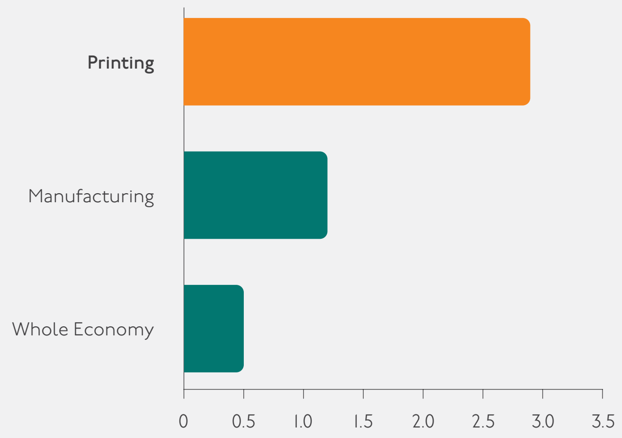


Gross Value Added (GVA) represents the amount that individual businesses, industries or sectors contribute to the economy. It is the difference between the value of goods and services produced by businesses (output) and the cost of raw materials and other inputs which are used up in production of those goods and services (intermediate consumption). Here, GVA is what the industry adds in value by its activities - essentially its direct contribution to the UK economy. GVA as a % of turnover is calculated to show the performance of each sector, relative to its size.

PRODUCTIVITY IN PRINT

Underperforming productivity continues to be a feature for much of the UK economy. However, the latest productivity statistics from the ONS reveal that the printing industry provides a productivity boost. Continued investment in training, technology and process improvements have ensured that productivity gains are well above national averages.

PRODUCTIVITY (OUTPUT PER HOUR)
AVERAGE ANNUAL % CHANGE 2015-2024



PRODUCTS BY SECTOR

Source: BPIF analysis of ONS data for 2023; Books comment, Print Power, printpower.eu

PRINT CAN TAKE MANY FORMS AND HAVE MANY USES.

As a visual media in its own right, a carrier and display of information, advertising, entertaining and educating. Look around and you'll see many examples of print right in front of you. Print is not only books, newspapers, magazines and advertising - it is packaging, fashion, art, signage, creativity, security and information.

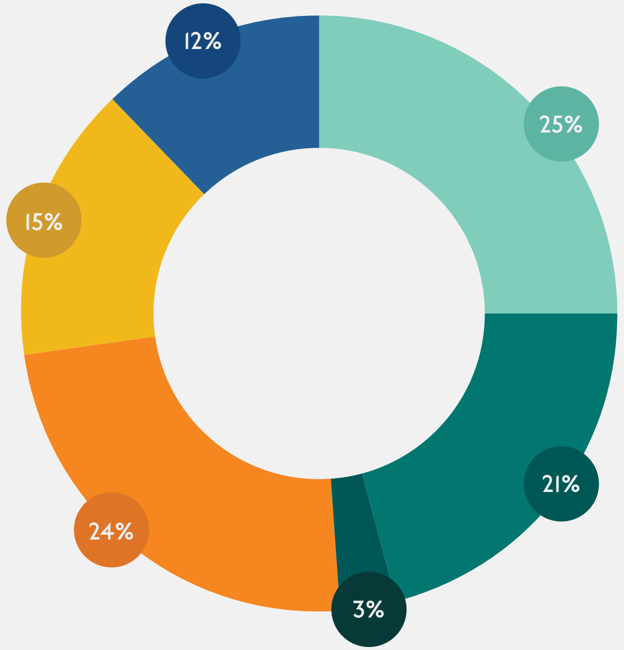
Advertising was the largest sector for print in 2023 and there's more on Print in Advertising in the next section. The next largest sectors are printed packaging (cartons, labels, sacks and bags) and books, magazines and newspapers.

The **printed packaging** industry is alive with new challenges and opportunities, with the UK carton sector at the forefront of developments. Its innovative British technology regularly leads the way in adding value to customer products and makes a significant contribution to the wider economy.

Books have received renewed attention in recent years. Celebrities are often seen carrying books, BookTok now plays a significant role in shaping bookshop displays, and younger adults are rediscovering the pleasure of reading.

Importantly, recent research into comprehension and retention has influenced public policy. In Sweden, for example, the government has halted its transition to fully digital education following evidence that students learn and remember better from paper. As a result, schools are returning to printed textbooks, and libraries are being restocked with physical books.

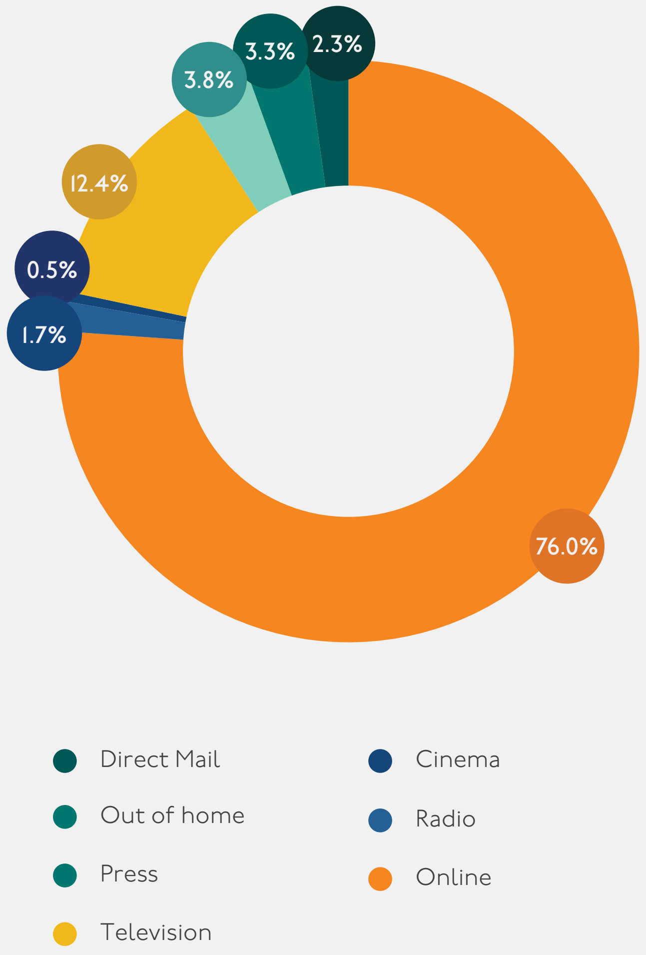
TURNOVER SHARE BY PRODUCT SECTOR
MARKETING REMAINS IMPORTANT WITH A SIGNIFICANT DIRECT AND INDIRECT IMPACT



- Advertising literature and business stationery
- Books, magazines and newspapers
- Security printing
- Printed packaging (cartons, labels, sacks and bags)
- Printing onto textiles, plastic, glass, metal, wood and ceramics
- Other printing

ADVERTISING IN PRINT

UK ADVERTISING EXPENDITURE 2024
% SHARE OF £42.6 BILLION



PRINT MAXIMISES EFFECTIVENESS.

INVEST IN PRINT

People today appreciate and expect choice. It's a statement that rings as true in the aisles of your local supermarket as it does at home when selecting your viewing choices. And so it is with media. While we consume an increasingly digital-rich diet, our appetite and appreciation is for a more diverse menu.

Print delivers that diversity to the media mix, in a highly creative, complementary fashion – offering levels of trust, attention and physical engagement that other channels simply cannot. That's not to say print advertising should be a marketer's first (or only) choice when deciding how to apportion spend – simply that it would be foolish not to consider it alongside the other options.

Advertising in print media – be it newspapers, magazines, direct mail or door-drops – can help to amplify the impact of other channels, including TV and digital, and increase the overall effectiveness of campaigns.

Despite the digital revolution, research indicates that print remains a valuable investment for marketers, presenting numerous opportunities for the printing industry. However, companies must adopt an active stance to leverage these opportunities. Brands like Heinz, Dove, Magnum, Coca-Cola, and Stella Artois demonstrate the important role of print advertising in newspapers and magazines. These major global brands recognise the value of print in their campaigns across various countries.

Visit Printpower.eu to access a wealth of essential facts, stories, expert views and insights – content that gives brand owners, and decision-makers in media and advertising agencies, the evidence and confidence they need to factor print into their budget planning.

THE POWER OF PRINT MEDIA

Source: Thinkbox 2024

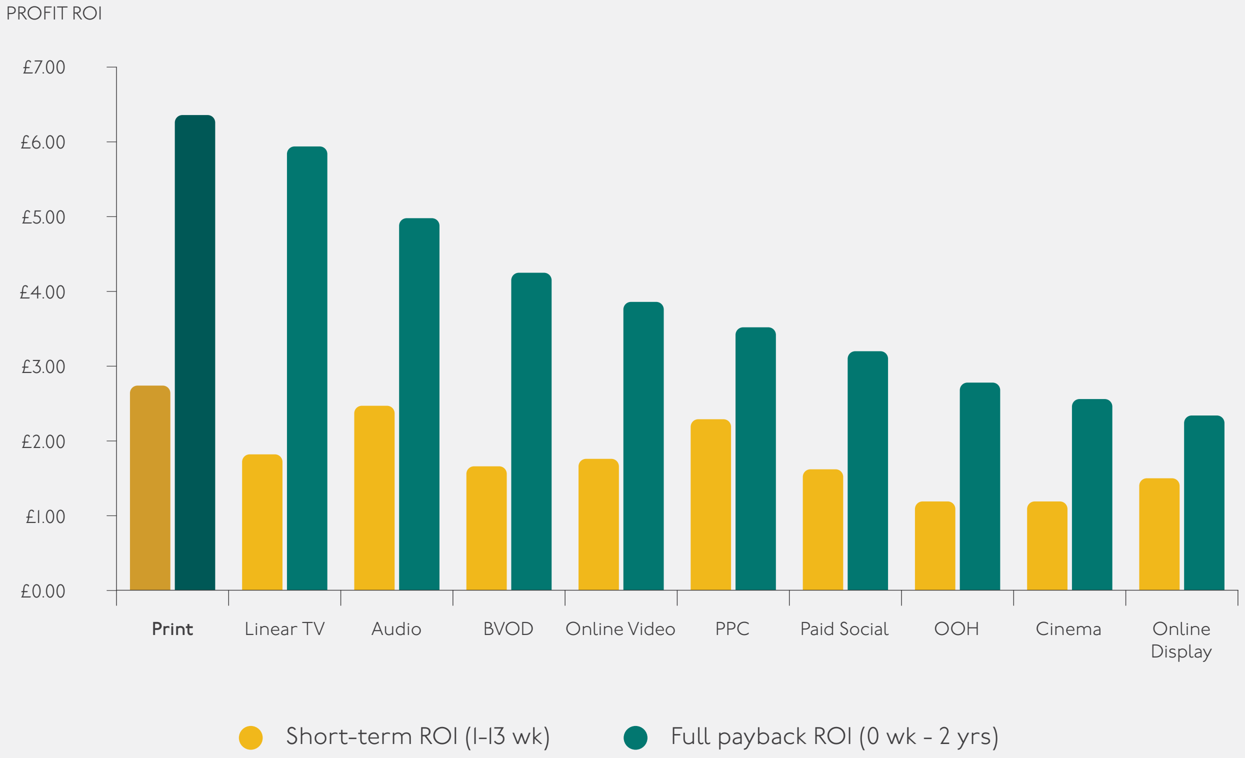
The debate on print's effectiveness often highlights the challenge of measurability, with online media offering more data points than advertising in newspapers, magazines, catalogues, or door drops.

While it's difficult to measure print and online media using the same metrics, print's effectiveness can still be demonstrated.

Thinkbox (UK 2024) analysed 141 brands across 14 sectors from 2021-2023, for a total budget of £1.8 billion. This study of actual cases found that print delivered the highest profit return on investment over both 13-week and two-year periods.

PRINT DRIVES ENGAGEMENT, DELIVERS ROI, AND BOOSTS LOYALTY.

PRINT DELIVERS THE HIGHEST PROFIT ROI
META-ANALYSIS UK, 141 BRANDS, 14 SECTORS, 2021-23



Yet some retailers have trialled moving from printed door drops to digital retail media. But does it work? A new scientific study by Arjen van Lin, Kristopher Keller and Jonne Guyt (2024) explores what happens when flyers are removed.

In early 2023, Lidl stopped delivering its weekly flyer to households in the province of Utrecht, while continuing distribution in the rest of the Netherlands. The flyer had long served as one of the discounter's key communication tools, listing promotions across fresh produce, national brands, and private labels.

Using GfK household scanner data from 2021–2023, the researchers compared shopping behaviour in Utrecht with that in other provinces. Their analysis focused on 2,772 households that had previously visited Lidl at least once.

WHAT HAPPENED WHEN LIDL STOPPED FLYER DISTRIBUTION

-7.7%
VALUE SPEND

-6.1%
UNITS PURCHASED

-4.6%
PROMOTED ITEMS BOUGHT

-6.3%
NON-PROMOTED ITEMS BOUGHT

-2.0%
TOTAL STORE VISITS

In contrast, households spent 6.2% more at other retailers, but without increasing the number of store visits. In other words, Lidl lost market share - customers shopped as often, just elsewhere.

These findings highlight the strategic value of the flyer: it keeps the brand top of mind among infrequent visitors, not just loyal ones. Without this reminder, Lidl lost both visibility and revenue.

Lidl's digital flyer, available via the "Lidl Plus" app and website, was heavily promoted in Utrecht. Most households had access, and many adopted the digital version after the print flyer disappeared.

The results were disappointing. Households that had previously used the digital flyer behaved no differently than before. Those who switched to digital around the time the print flyer ended, however, reduced their spend at Lidl significantly, on all fronts.

The study suggests these households adopted the digital flyer out of necessity, not preference, and failed to engage with it meaningfully.

Organisations considering a shift away from door drops must weigh not only sustainability and cost, but also customer habits, brand presence, and overall business impact.

Door drops and digital retail media are not interchangeable; they serve different roles in communication. Despite a growing shift toward digital, printed flyers remain the most effective channel for reach, visibility, and sales impact. For organisations navigating this transition, a hybrid strategy that maintains the strength of print while testing digital formats may offer the most balanced approach to sustaining engagement and measurable results.

Source: Print Power, printpower.eu

FOR NOW, ONE THING IS CLEAR

PRINTED FLYERS DELIVER

PRINT IS SUSTAINABLE

Source: *Two Sides Trend Tracker 2025, UK Findings, twosides.info*

[1] Forest Europe, State of Europe's Forests, 2020, foresteurope.org

[2] Cepi, cepi.org

[3] UK Parliament, Energy consumption of ICT, 2022

[4] European Environmental Agency Greenhouse Gases Data Viewer, 2021, eea.europa.eu

PRINT AND PAPER'S PLACE IN A DIGITAL WORLD

The print and paper industry is surrounded by myths, many of which are rooted in historical misconceptions about paper's impact on forests. For many years, service providers have reinforced these environmental myths in their efforts to move consumers to digital communications. The need to update perceptions and raise awareness of paper's sustainability is now more important than ever.

Research from Two Sides highlights the gap that still exists between perception and reality. In the UK:

53%

PERCEPTION
53% believe European forests are shrinking, 16% believe they are growing.

REALITY
Between 2005 and 2020, European forests grew by 58,390km² - that's an area larger than Switzerland and equivalent to 1,500 football pitches of forest growth every day. These forests supply over 90% of the wood used by the European paper industry.

64%

PERCEPTION
64% believe only recycled paper should be used.

REALITY
Because fibre degrades after time, virgin fibre is essential to European paper production. 52% of the fibre used by the European paper industry comes from paper for recycling.

37%

PERCEPTION
37% believe paper and paper packaging are bad for the environment.

REALITY
Paper is based on wood, a natural and renewable material. As young trees grow, they absorb CO2 from the atmosphere. Furthermore, as a wood product, paper continues to store carbon throughout its lifetime. European forests act as a major carbon sink. Between 2010 and 2020, the average annual sequestration of carbon in forest biomass reached 155 million tonnes in the European region[1].

40%

PERCEPTION
40% believe paper is a wasteful product.

REALITY
The European recycling rate is 79%, making it one of the most recycled materials in the world![2] In Europe, paper fibres are reused 3.5 times on average.

64%

PERCEPTION
64% believe electronic comms are more eco-friendly than paper-based comms.

REALITY
The ICT industry accounted for 4-6% of global electricity use in 2020, which is more than 2% of global greenhouse gas emissions. With increasing demand, the ICT industry is expected to increase its global electricity use over the next decade.[3] In Europe, the print and paper sector is one of the lowest industrial greenhouse gas emitters at 0.8%.[4]

PRINT COMPANIES TAKING ACTION AND MAKING SUSTAINABILITY IMPROVEMENTS.

MORE COMPANIES ARE NOW MEASURING CARBON EMISSIONS, SETTING TARGETS, VALIDATING THOSE TARGETS, GAINING RELEVANT ACCREDITATIONS, AND INVESTING IN INITIATIVES TO FURTHER IMPROVE THEIR SUSTAINABILITY PERFORMANCE AND CREDENTIALS.

We are unquestionably in a period of intensifying focus on sustainability, with companies under extra pressure to acknowledge, measure, and limit the adverse impacts their own operations have, and that of their products/services life-cycle, on the environment.

The Printing Industry has a part to play, and a story to tell, and we at the BPIF want to help communicate that and drive sustainable improvements in our industry. Every six months we include a section on sustainability in our Printing Outlook research - here we are showcasing some of the latest findings of that research.

Source: BPIF Printing Outlook, Q2 2025

MEASURING CARBON EMISSIONS

Is your business measuring its carbon emissions (carbon footprint)?
In April 2025, 77% of respondents reported that they are measuring their carbon emissions.

WHICH EMISSIONS?

Which emissions are being measured?
Over one-third (35%) of all respondents are measuring Scope 1, 2 and 3 emissions. A further 41% are measuring Scope 1 and 2 emissions. However, 18% of all respondents intend to expand their coverage to include Scope 3 emissions in the next 12 months.

REDUCING CARBON FOOTPRINT

Is your business working to reduce its carbon footprint?
Measuring emissions is only the start, over four-fifths of respondents (83%) are working to reduce their carbon footprint.

EMISSION REDUCTION TARGETS

Have you set emission reduction targets?
Almost two-fifths (37%) of all responding companies have set emission reduction targets.

SUSTAINABILITY INVESTMENTS

Has your business made, or is it planning to make, investments in the following areas?
The most popular area of attention for sustainability related investments was waste reduction, selected by 73% of respondents. The second most popular area of investment was solar panels with 57%. Electric vehicles achieved third ranking with 56%.

CUSTOMERS DEMANDING CARBON EMISSIONS DATA AND SUSTAINABILITY CREDENTIALS

Are customers demanding carbon emissions data and sustainability credentials from you?
Three-fifths (60%) of companies reported that they have customers demanding carbon emissions data and sustainability credentials from them - over three-quarters of these (77%) say that such demands are intensifying.

SUSTAINABILITY ACCREDITATIONS AND CERTIFICATIONS

Does your business have any accreditations or certifications related to sustainability?
Almost three-fifths (58%) of companies reported that they have accreditations and certifications related to sustainability – the most common of these being ISO 14001, followed by FSC, EcoVadis and the World Land Trust.

INCREASED DEMAND FOR SUSTAINABLE PRODUCTS

Have you experienced an increase in demand for sustainable products?
Over two-fifths (44%) of respondents have noticed an increase in demand for sustainable products in the last 12 months.

UK PRINTING FACTS AND FIGURES 2025-2027

THE FUTURE FOR PRINT

Source: *Post-Drupa Technology Forecast for Print and Printed Packaging to 2034, Smithers, smithers.com*

Printing methods used in ten years' time will be broadly similar to those in 2025. There will be greater use of digital printing, producing a higher proportion of labels and packaging. Beyond direct print technology changes, drivers of change for print include wider technology developments (notably AI), sustainability, macro- and micro-economics, demographic changes, and retail supply chain changes.

There will be developments in terms of software, robotics, autonomous production, locations of printing and adjacent markets. The biggest changes will be in business models and routes to market for print suppliers, with secure networks effectively allowing any print supplier access to an unlimited capacity and range of production to serve their customers. But some things won't change: demand for fast response, lower prices, more sustainable products and services, and new functions of print.

TARGET INVESTMENTS TO UTILISE TECHNOLOGICAL ADVANCEMENTS.

IMPACT OF TECHNOLOGY ON PRINT DEMAND TO 2030

BLOCKCHAIN
Security and transactions

ARTIFICAL INTELLIGENCE
Print machine efficiency & workflow optimisation

INTERNET OF THINGS
Machine efficiency & supply chain automation

FAST DATA NETWORKS
5/6G smartphones, & secure file transfers in Cloud

ROBOTICS
Physical manufacturing & software

SMART TECHNOLOGY
Adding functionality to print and packaging

MULTIEXPERIENCE
AR experience

FOUR TRENDS FOR 2025-2030

The printing industry has had plenty of experience of adapting to change – the pace of change appears to be accelerating, and companies will need to carefully target their investments to cope with this. Here are some areas that companies will need to focus on in the next five years.

Technology
So much to consider here – continued expansion of digital and large format, and the ability of inkjet to print longer runs and adapt to new substrates. In litho there will be enhancements to improve short-run capabilities, monitoring and service improvements, and long-run efficiency improvements. There will be companies exploring how AI and other software developments can improve customer service, workflow and automation, and an expansion of robotic utilisation to improve efficiency and cost control.

Sustainability
As in the last few years, the importance of monitoring and improving sustainable practices and credentials will continue to elevate. Supply chain credibility is becoming more important – materials need to be sourced appropriately, tracked and used efficiently. Increased client attention to sustainability and recyclability will see further opportunities for paper/fibre-based substrates.

Creativity
The industry has an opportunity to display its creativity and really catch the imagination of designers, marketing professionals, clients and end-users. Out-of-home, smart packaging, new product development – there are many areas where creative excellence and the integration of technology can really help drive engagement with print.

Regulatory
Unfortunately, the regulatory burden that businesses need to comply with looks set to increase in 2025 and beyond. There's new employment legislation, Extended Producer Responsibility (EPR) regulations, Plastic Packaging Tax (PPT), and for those involved in trading with the EU– there is, of course, the General Product Safety Regulations (GPSR) the EU Deforestation Regulations (EUDR) . The BPIF will remain active in advising members and representing our industry to governments - both home and abroad.

Source: BPIF, britishprint.com

UK PRINTING FACTS AND FIGURES 2025-2027

FOUR TRENDS FOR 2025-2030

TECHNOLOGY
SUSTAINABILITY
REGULATORY
CREATIVITY

CHALLENGES FOR PRINT IN A DIGITAL WORLD

Source: Two Sides Trend Tracker 2025, UK Findings, twosides.info

Print and digital are often compared in a bid to decide which is best. However, the debate shouldn't centre around "print vs. digital", as both channels are important and complement each other. Ultimately, consumers must be given the right to decide how they would like to access news and information; ensuring that consumer choice is maintained and those unwilling or unable to access digital information are not disadvantaged.

THE DEBATE SHOULDN'T BE CENTERED AROUND 'PRINT VS DIGITAL'.

ATTITUDES TOWARDS DIGITAL

- **52%** Believe they spend too much time on electronic devices.
- **31%** Believe they suffer from digital overload.
- **55%** Don't pay attention to online adverts.
- **49%** Do their best to block or avoid online adverts.
- **57%** Are increasingly concerned that personal information held electronically is at risk.
- **50%** Are concerned that the overuse of electronic devices could be damaging to health.

POSITIVES FOR PRINT

- **51%** Would be concerned if printed newspapers were to disappear.
- **62%** Still prefer to read printed books.
- **40%** Say they get a better understanding of news stories in print.
- **70%** Believe they should not be charged more for choosing a paper bill or statement.
- **81%** Want the right to choose how they receive their bills and statements.
- **61%** Believe arguments to switch to digital are misleading and about reducing cost.

BPIF

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WE ARE YOUR BPIF.

Your vision, your voice, your association.

The BPIF are a leading trade association for British print, supporting the print, printed packaging and graphic communication industries.

We produce extensive, high quality, industry specific research to help our members and the wider printing industry make the best decisions for their business and showcase the economic importance of print.

A huge thank you to everyone who has contributed!

BPIF – The Heart of British Print

bpifofficial

BPIF - British Printing Industries Federation

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SMITHERS ACCURATE DATA • ON TIME • HIGH TOUCH www.smithers.com

WORLD'S FIFTH LARGEST PRODUCER OF PRINTED PRODUCTS

£13.7 BILLION TURNOVER

£5.9 BILLION GROSS VALUE ADDED

6,800 COMPANIES

93,000 EMPLOYEES

£708 MILLION POSITIVE TRADE BALANCE

£648 MILLION CAPITAL INVESTMENT

£3.9 BILLION WAGES CONTRIBUTION TO THE UK WORKFORCE

Note: All data is for 2024 unless specified; turnover is forecast to reach £14 billion in 2025.