

North Carolina

2007 State Print Market Fact Sheet

Total Establishments	889
Total Employment	25,709
Total Shipments (\$M)	\$4,415.1

Data by Size of Establishment:

<u>Employees</u>	<u>Printing Establishments</u>	<u>Shipments (\$M)</u>	<u>Printing Employees</u>
1-4	285	\$75.3	690
5-9	236	\$186.2	1,657
10-19	152	\$260.4	2,106
20-49	112	\$470.8	3,380
50-99	54	\$691.1	4,175
100-249	32	\$933.4	4,748
250+	18	\$1,797.8	8,954

Major Metropolitan Area Printing Centers:

<u>Fips Code</u>	<u>MSA</u>	<u>Printing Establishments</u>	<u>Shipments (\$M)</u>	<u>Printing Employees</u>
0481	Asheville	33	\$195.0	1,067
1520	Charlotte-Gastonia-Rock Hill	183	\$860.1	5,172
2560	Fayetteville	21	\$118.3	610
2980	Goldsboro	7	\$33.7	189
3120	Greensboro--Winston Salem-High Point	194	\$1,282.8	7,306
3150	Greenville	14	\$35.8	242
3290	Hickory-Morganton-Lenoir	38	\$367.4	1,907
3605	Jacksonville	9	\$7.1	56
6640	Raleigh-Durham-Chapel Hill	145	\$573.2	3,492
6895	Rocky Mount	9	\$20.2	145
9200	Wilmington	29	\$91.3	541

2008 Print Market Atlas. Includes commercial and quick printing, newspaper printing, package printing, business forms printing, trade binding and prepress services. Inclusion of publishing would significantly increase employment and shipments. Source & Methodology: These estimates were derived by PIA/GATF using the A.F. Lewis Company database of printing establishments, PIA/GATF Ratios, and PIA/GATF 4th quarter market survey data. The 2007 estimates may not be comparable to earlier estimates because of re-calibration of employees-per-plant and shipments-per-employee ratios using the latest Census data and Printing Impression Top 400 data. Note: totals may not add up equally due to rounding.

North Carolina

<u>Printing Process</u>	<u>Establishments</u>	<u>Employment</u>	<u>Shipments (\$M)</u>
Digital Printing	296	2,612	\$425.7
Sheetfed Offset Printing	582	11,586	\$1,906.7
Web Offset Printing	104	7,297	\$1,379.5
Other Printing/Trade Services	199	4,215	\$703.3
Total	1,181	25,709	\$4,415.1

<u>Market Segment</u>	<u>Establishments</u>	<u>Employment</u>	<u>Shipments (\$M)</u>
Book Printing	4	1,368	\$202.3
Business Forms Printing	14	731	\$101.7
Financial Legal Printing	7	316	\$56.6
General Commercial Printing	434	7,581	\$1,144.4
Label, Wrapper Printing	19	555	\$106.3
Magazine Printing	1	78	\$11.3
Newspaper Printing	112	6,589	\$1,253.4
Other Finishing Services	13	277	\$22.8
Other Speciality Printing	13	944	\$166.1
Package Printing	48	4,976	\$1,062.6
Prepress Services	16	398	\$53.6
Quick Printing	174	1,123	\$118.0
Screen Printing	16	224	\$30.7
Tag, Ticket, Tape Printing	5	393	\$72.3
Thermography	3	19	\$2.2
Trade Binding	10	140	\$10.9
Total	889	25,709	\$4,415.1

Note: The number of establishments under the "printing process" tabulation is larger than the total number of state printing establishments due to the fact that many establishments utilize more than one type of printing process. If a plant uses both a sheetfed offset printer and a web offset printer; hence the establishment is counted twice in this analysis. The plant's employment and shipment totals are divided amongst the sheetfed and web categories using a model developed by PIA/GATF.

Size of Establishments

(Number of Employees)

MSA Name	1-4	5-9	10-19	20-49	50-99	100-249	250+	Total
Asheville, NC	Establishments	15	5	5	2	5	1	33
	Employees	37	34	69	61	395	471	1,067
	Shipments (\$M)	\$4.2	\$4.0	\$8.7	\$8.2	\$68.8	\$101.1	\$195.0
Charlotte-Gastonia-Rock Hill, NC-SC	Establishments	61	38	34	30	8	3	183
	Employees	147	270	467	932	608	1,337	5,172
	Shipments (\$M)	\$16.1	\$30.9	\$56.3	\$127.0	\$89.3	\$262.7	\$860.1
Fayetteville, NC	Establishments	9	7	3	1	1	1	21
	Employees	22	48	43	27	610	471	610
	Shipments (\$M)	\$2.3	\$5.2	\$5.2	\$4.6		\$101.1	\$118.3
Goldsboro, NC	Establishments	2	3	1	1	1	7	7
	Employees	5	22	14	149	189	189	189
	Shipments (\$M)	\$0.6	\$2.5	\$1.9	\$28.7	\$33.7		\$33.7
Greensboro--Winston Salem--High Point, NC	Establishments	50	56	28	26	17	5	194
	Employees	120	389	394	795	1,295	2,568	7,306
	Shipments (\$M)	\$13.2	\$42.6	\$48.1	\$106.9	\$222.5	\$502.0	\$1,282.8
Greenville, NC	Establishments	6	4	1	1	2	14	14
	Employees	15	27	13	31	157	242	242
	Shipments (\$M)	\$1.8	\$2.9	\$1.4	\$4.1	\$25.6		\$35.8
Hickory-Morgantown-Lenoir, NC	Establishments	13	6	5	6	4	2	38
	Employees	31	42	72	178	319	965	1,907
	Shipments (\$M)	\$3.3	\$4.8	\$9.9	\$27.3	\$54.2	\$201.6	\$367.4
Jacksonville, NC	Establishments	6	2	1	1	1	9	9
	Employees	14	14	28	28	56	56	56
	Shipments (\$M)	\$1.4	\$1.4		\$4.2	\$7.1		\$7.1
No Metro Area	Establishments	67	61	35	24	14	3	207
	Employees	164	435	493	701	1,086	1,661	4,981
	Shipments (\$M)	\$18.2	\$50.4	\$64.2	\$102.8	\$183.5	\$322.8	\$830.2
Raleigh-Durham-Chapel Hill, NC	Establishments	47	39	31	19	3	3	145
	Employees	113	269	420	568	237	1,407	3,492
	Shipments (\$M)	\$11.8	\$29.3	\$50.1	\$77.3	\$35.2	\$291.4	\$573.2
Rocky Mount, NC	Establishments	2	3	3	1	1	9	9
	Employees	5	21	41	78	145	145	145
	Shipments (\$M)	\$0.6	\$2.6	\$5.1	\$12.0	\$20.2		\$20.2

Size of Establishments

(Number of Employees)

MSA Name	1-4	5-9	10-19	20-49	50-99	100-249	250+	Total
Wilmington, NC	7	12	6	2		2		29
Establishments	17	85	82	59		298		541
Employees	\$1.9	\$9.6	\$9.7	\$8.3		\$61.9		\$91.3
Shipments (\$M)	285	236	152	112	54	32	18	889
Sum of State Totals	690	1,657	2,106	3,380	4,175	4,748	8,954	25,709
Establishments	\$75.3	\$186.2	\$260.5	\$470.8	\$691.1	\$933.4	\$1,797.8	\$4,415.1
Employees								
Shipments (\$M)								