

UK Printing and Printed Packaging

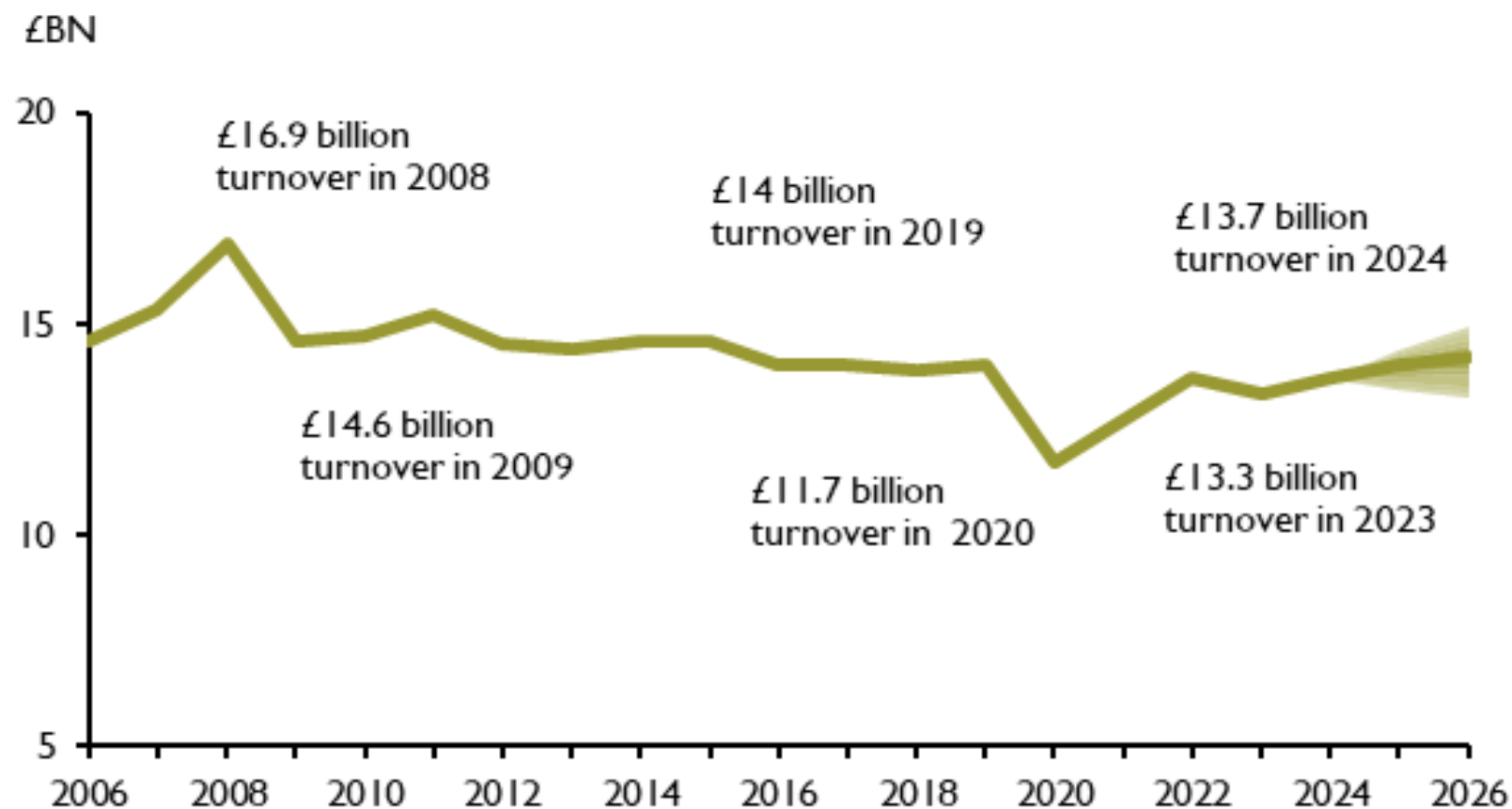
Charles Jarrold

Chief Executive, BPIF

INDUSTRY UPDATE

BPIF
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UK PRINTING INDUSTRY
TURNOVER (£BN) 2006-
2026

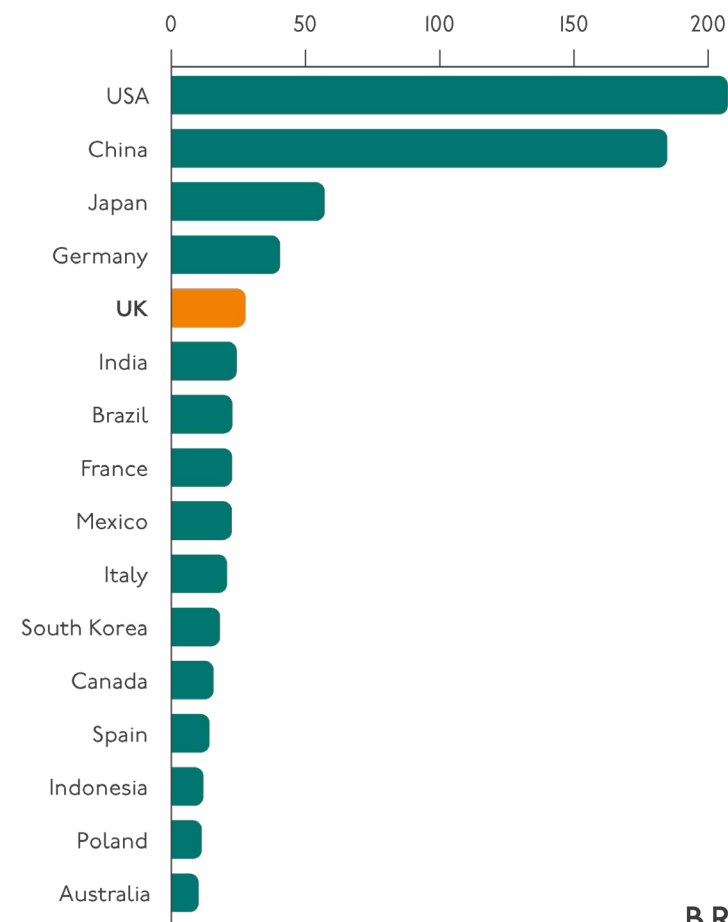
Source: BPIF *2025 - 2026 forecast estimates

INTERNATIONAL IMPORTANCE

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.



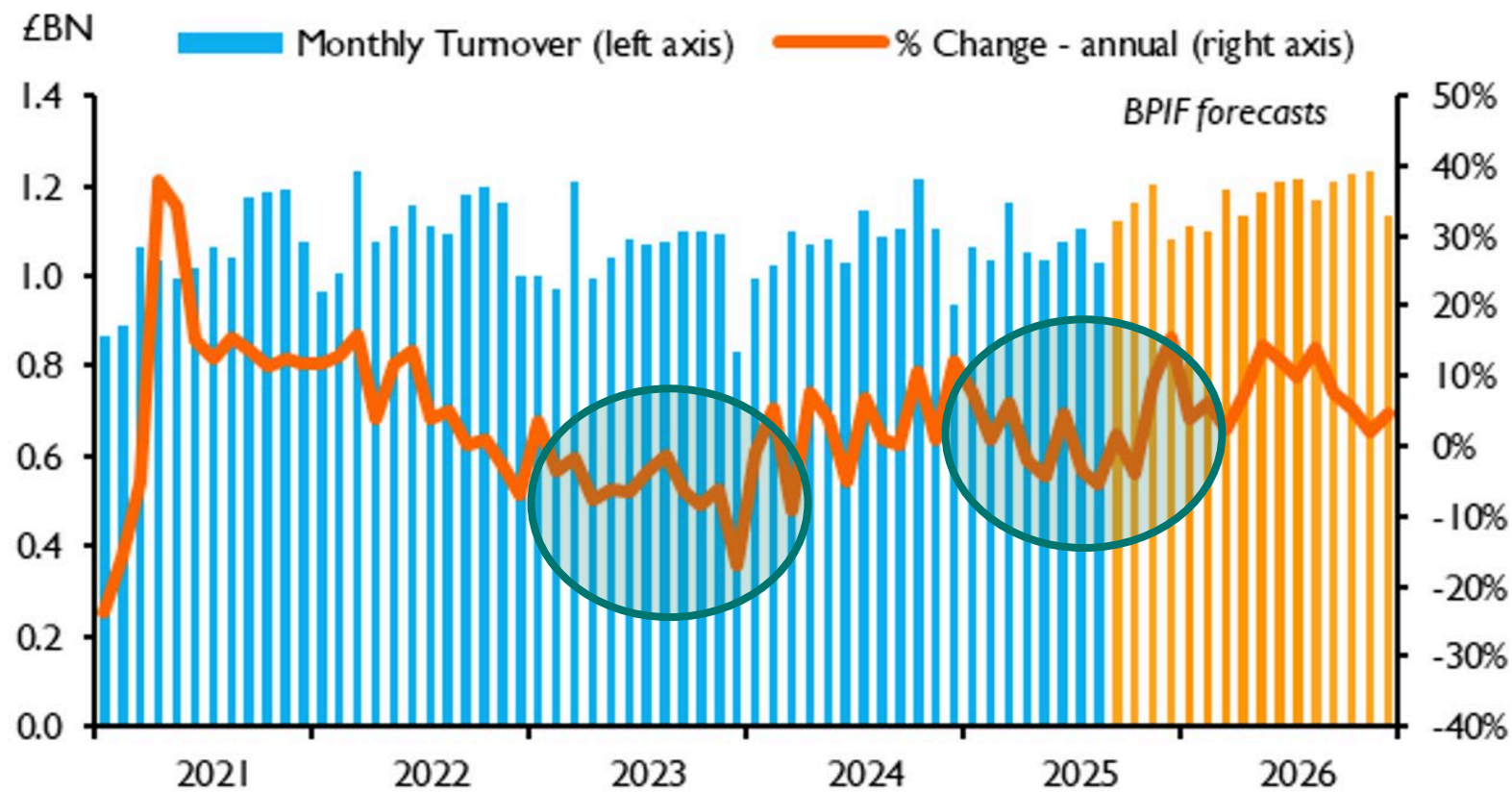
LARGEST NATIONAL PRINT MARKETS
2024 VALUE \$ BILLION



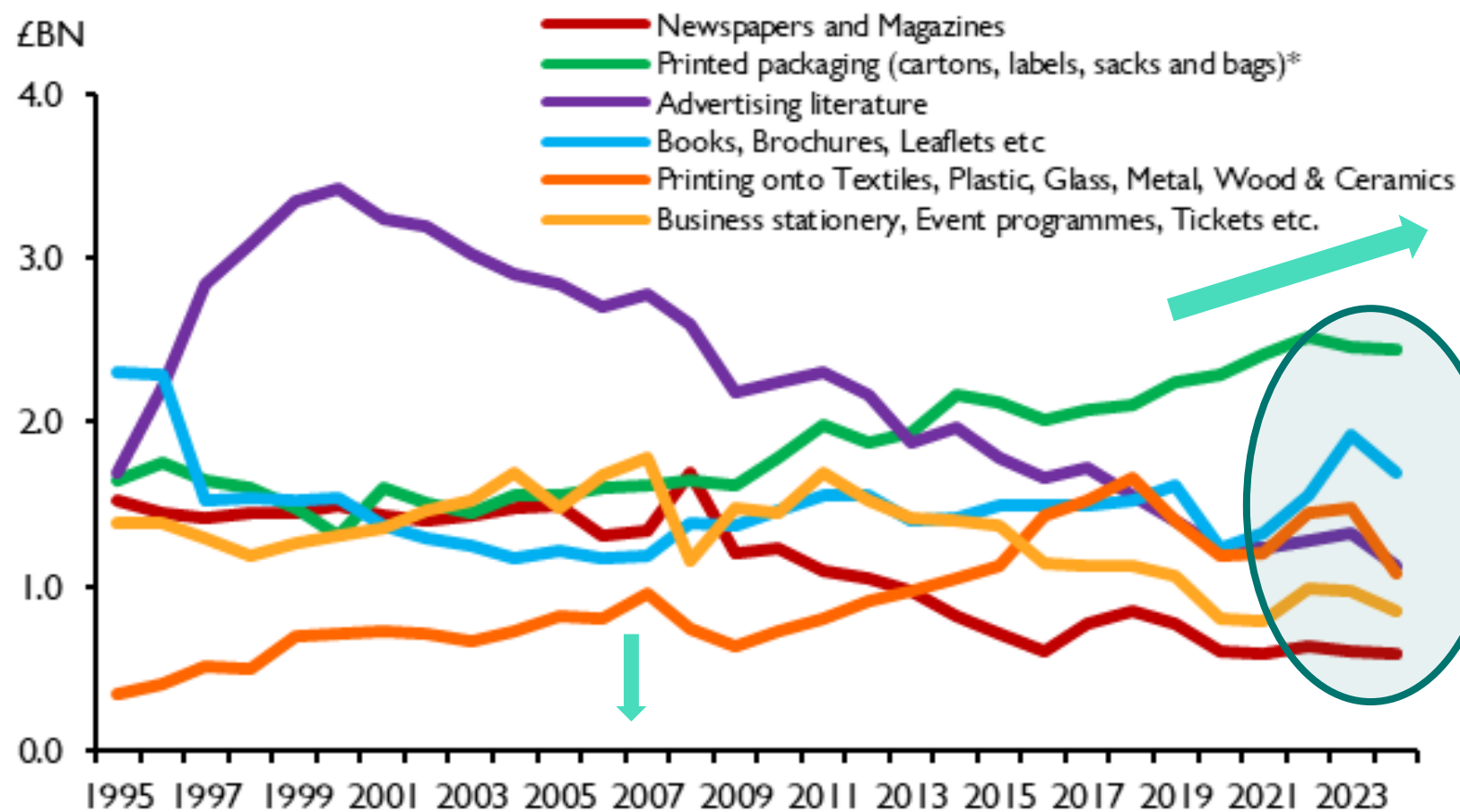
TREND SUMMARY: Q4 HOT OFF THE PRESS!

Indicator	Q3 Balance	Change (q-on-q)	Q4 Forecast	Change (q-on-q)
Output	39	↑	45	↑
Orders	23	↑	33	↑
Confidence	23	↑	16	↓
Employment	14	↑	13	↓
Exports	-4	↓	3	↑
Margins	-6	↓	9	↑

Key	
↑	positive and improving
↓	negative but less so than previously
↓	positive but less so than previously
↓	negative and deteriorating
=	positive and unchanged
=	negative and unchanged



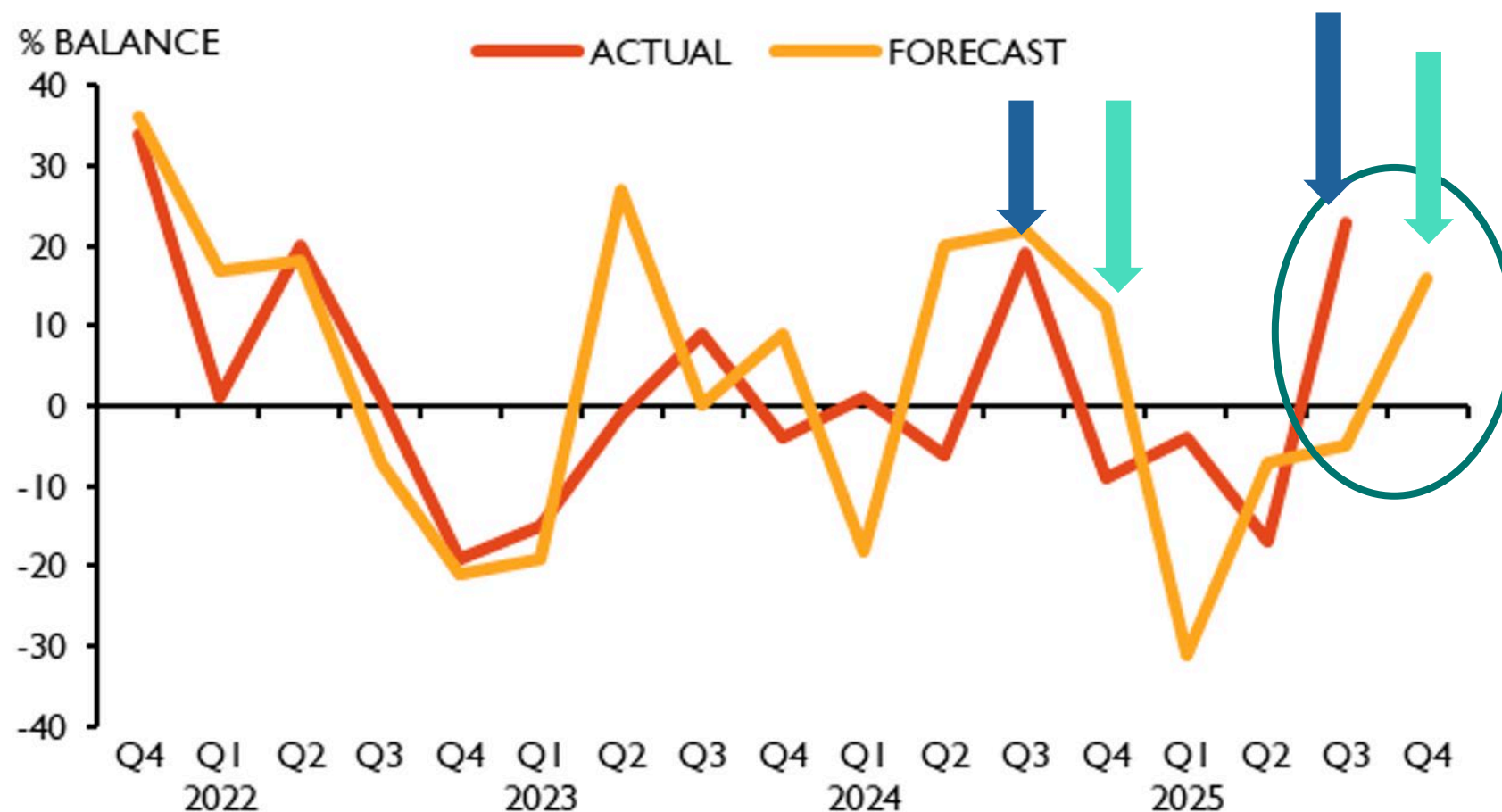
PRINTING TURNOVER
INCLUDING CARTONS,
LABELS AND PAPER
STATIONERY



* Excludes corrugated

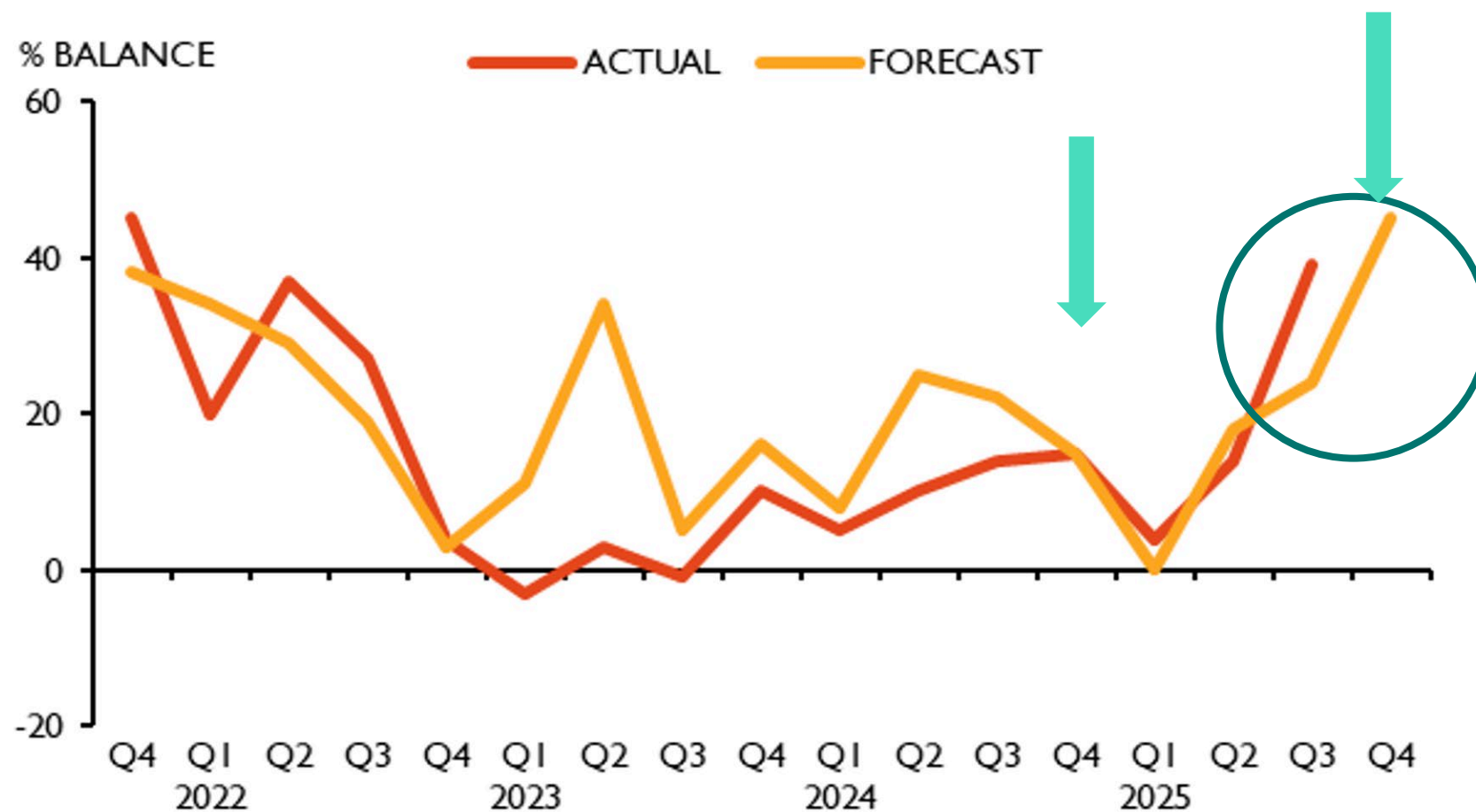
Source: BPIF analysis of ONS data

SECTOR TURNOVER
ADVERTISING DECLINE,
PACKAGING GROWTH



GENERAL STATE OF THE TRADE STRONG TURNAROUND FOR CONFIDENCE IN Q3 AND Q4

Source: BPIF Printing Outlook



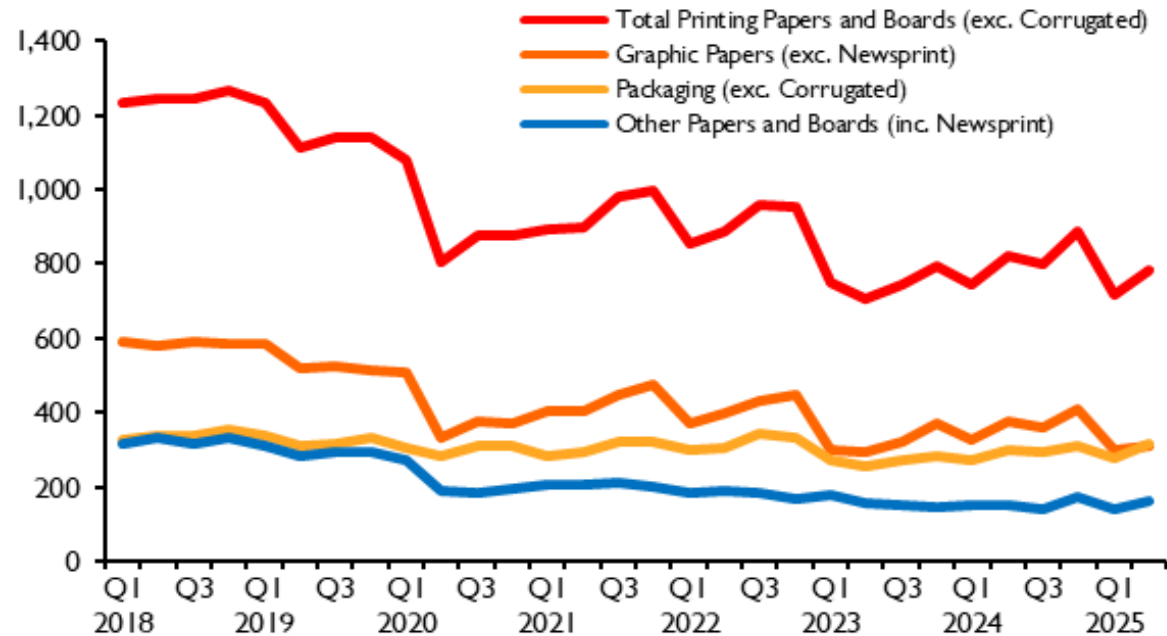
VOLUME OF OUTPUT
IMPROVEMENT
BEYOND
EXPECTATIONS,
STRONG Q4 AHEAD

Source: BPIF Printing Outlook

PAPER CONSUMPTION

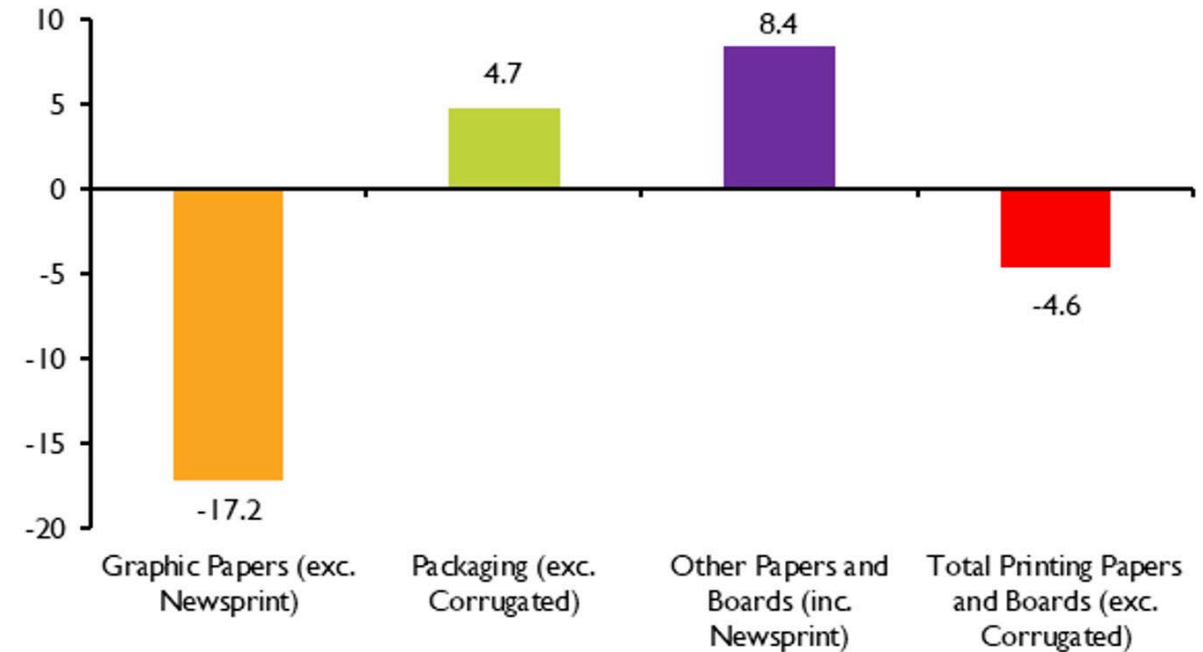
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QUARTERLY VOLUMES



Source: BPIF Research presentation of data from the CPI

% CHANGE Q2 2025 V Q2 2024

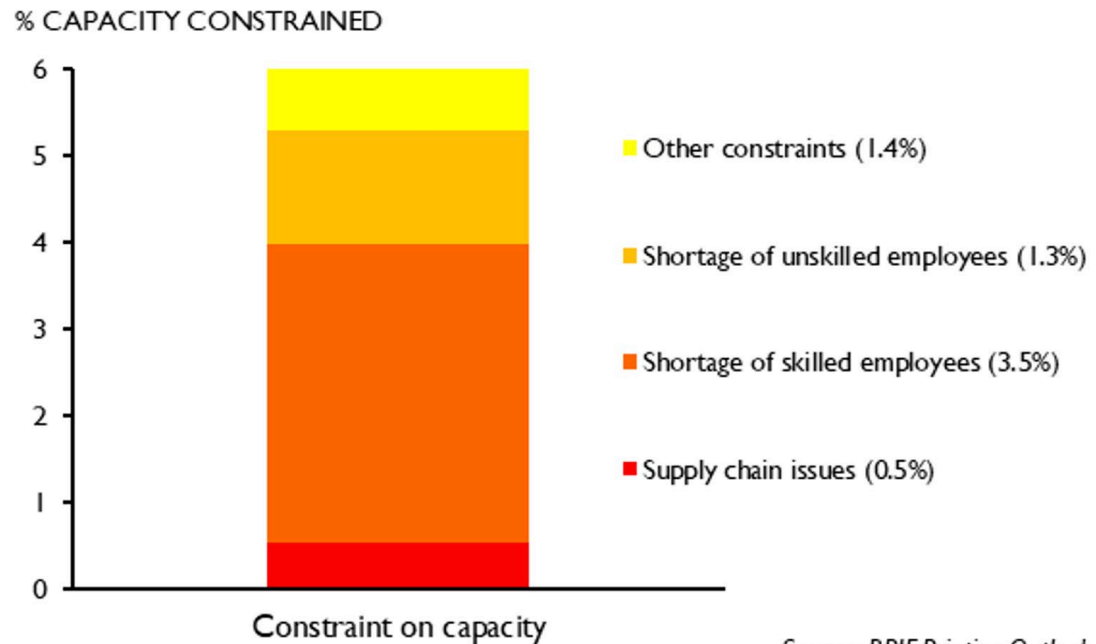


Source: BPIF Research presentation of data from the CPI

Constraints on capacity

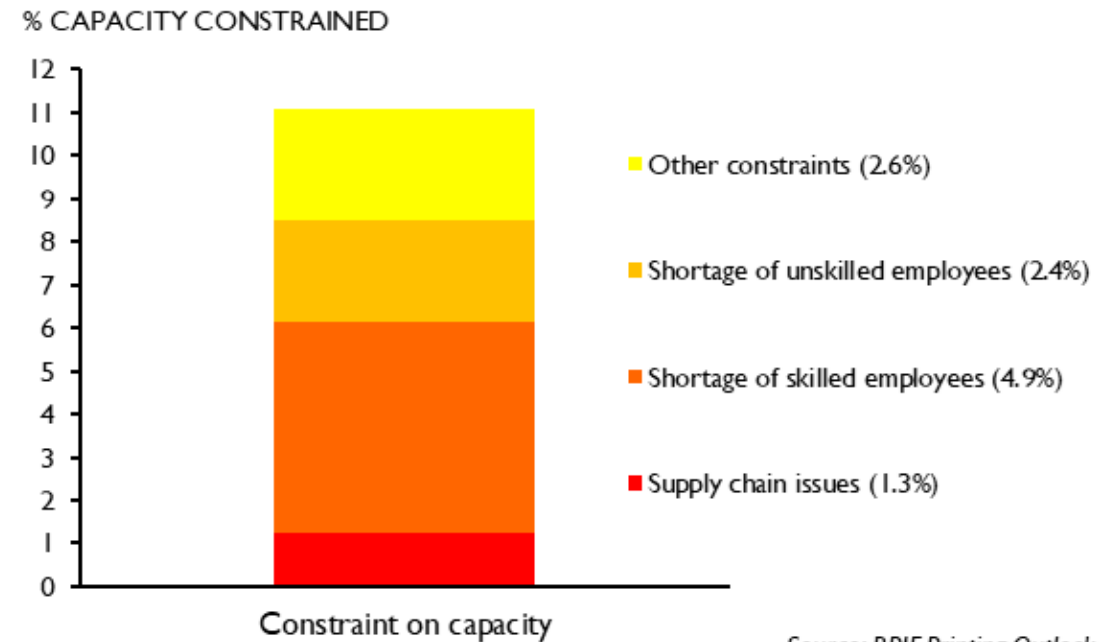
Shortage of Employees the main constraint

2025 Q4



Source: BPIF Printing Outlook

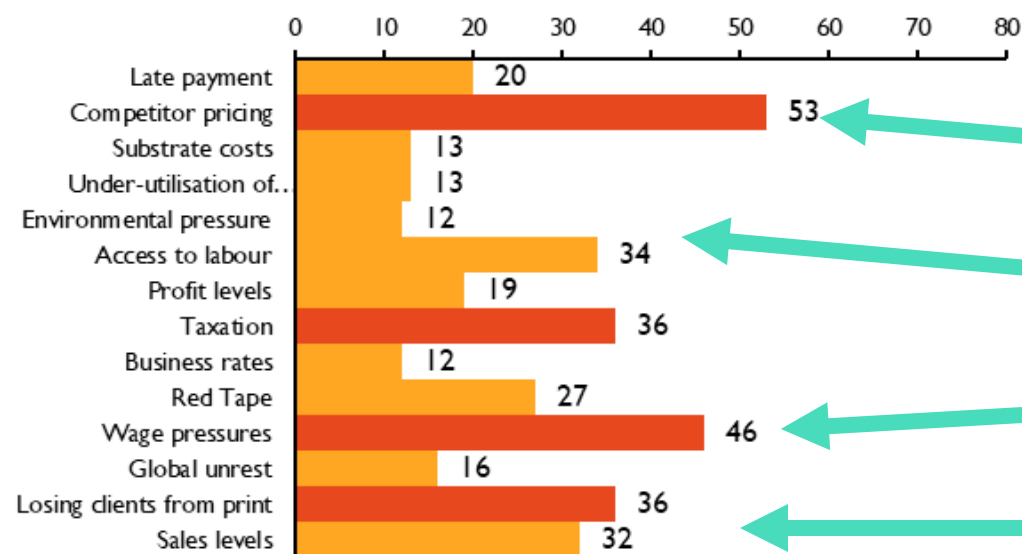
2024 Q4



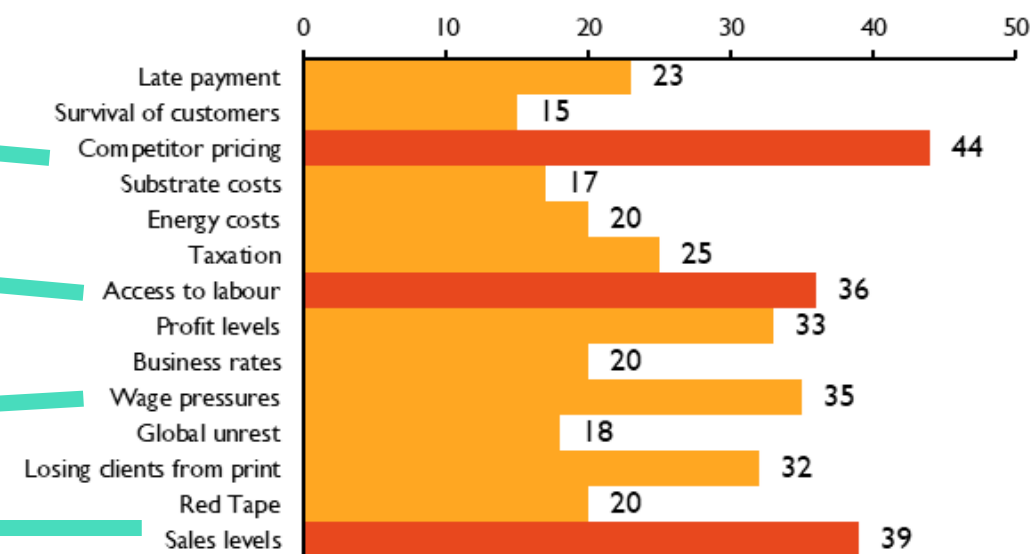
Source: BPIF Printing Outlook

TOP BUSINESS CONCERNS

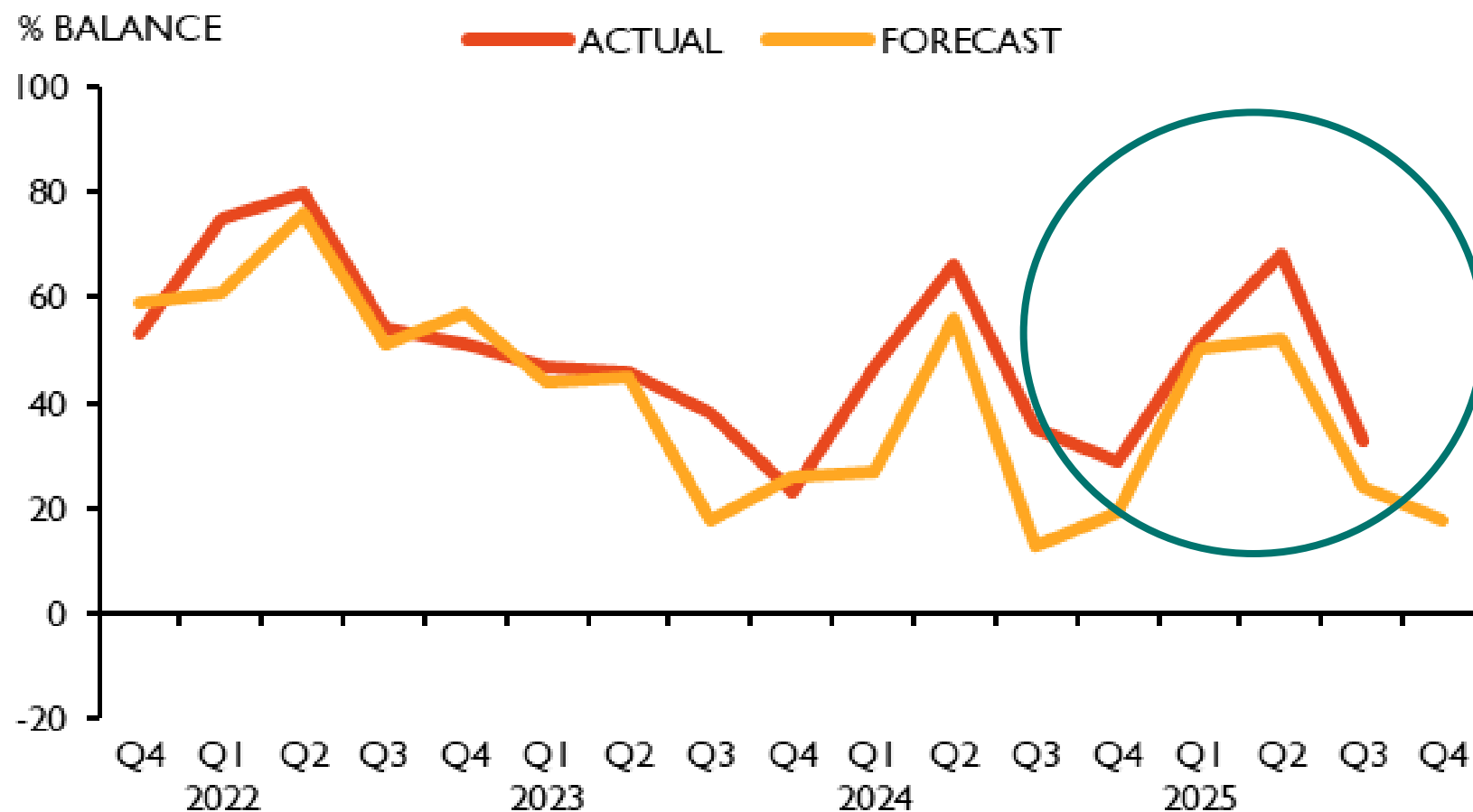
% OF RESPONDENTS SELECTING



Source: BPIF Printing Outlook



Source: BPIF Printing Outlook

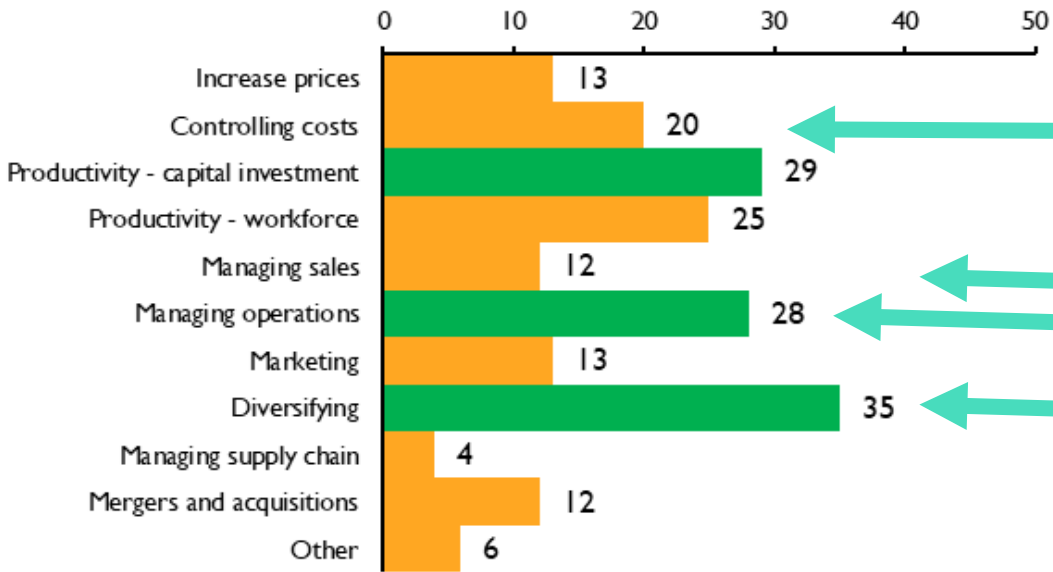


LABOUR COSTS
HAVE CONTINUED TO
INCREASE ABOVE
FORECAST LEVELS

Source: BPIF Printing Outlook

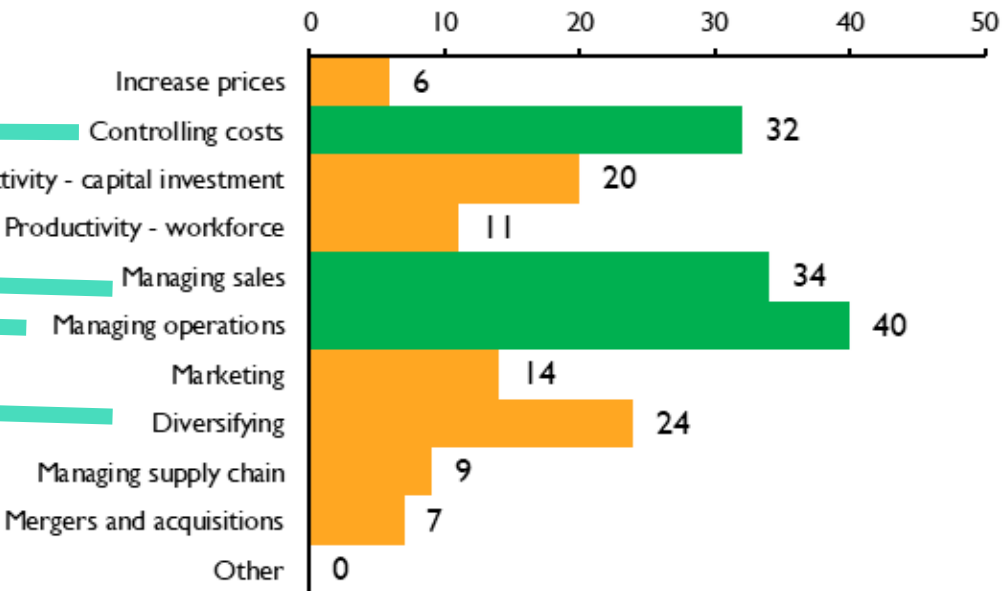
PLANS TO INCREASE PROFITABILITY
% OF RESPONDENTS SELECTING

CY



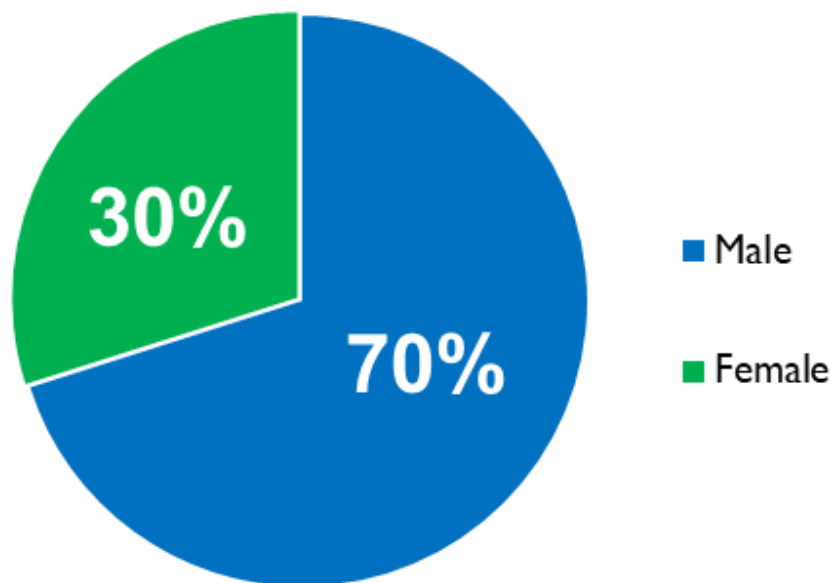
Source: BPIF Printing Outlook

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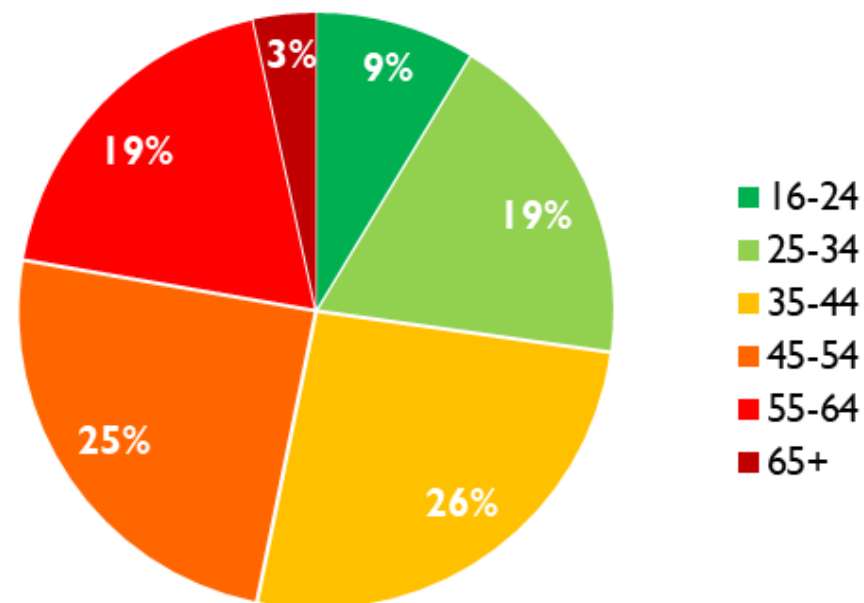
Source: BPIF Printing Outlook

UK PRINTING INDUSTRY EMPLOYEES BY GENDER



Source: BPIF Research analysis of ONS data

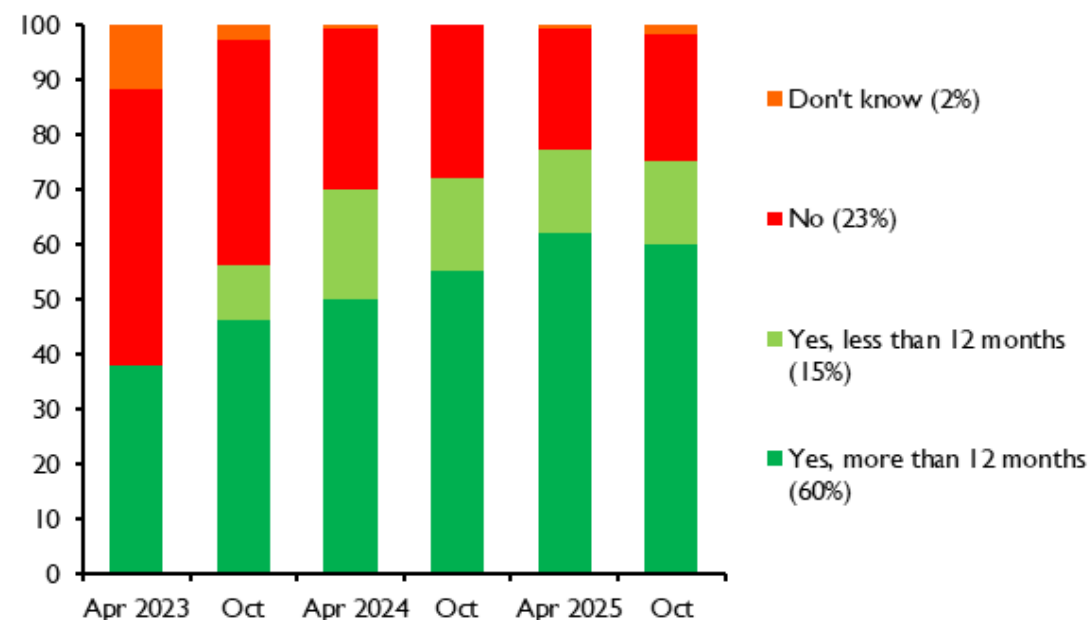
UK PRINTING INDUSTRY EMPLOYEES BY AGE



Source: BPIF Research analysis of ONS data

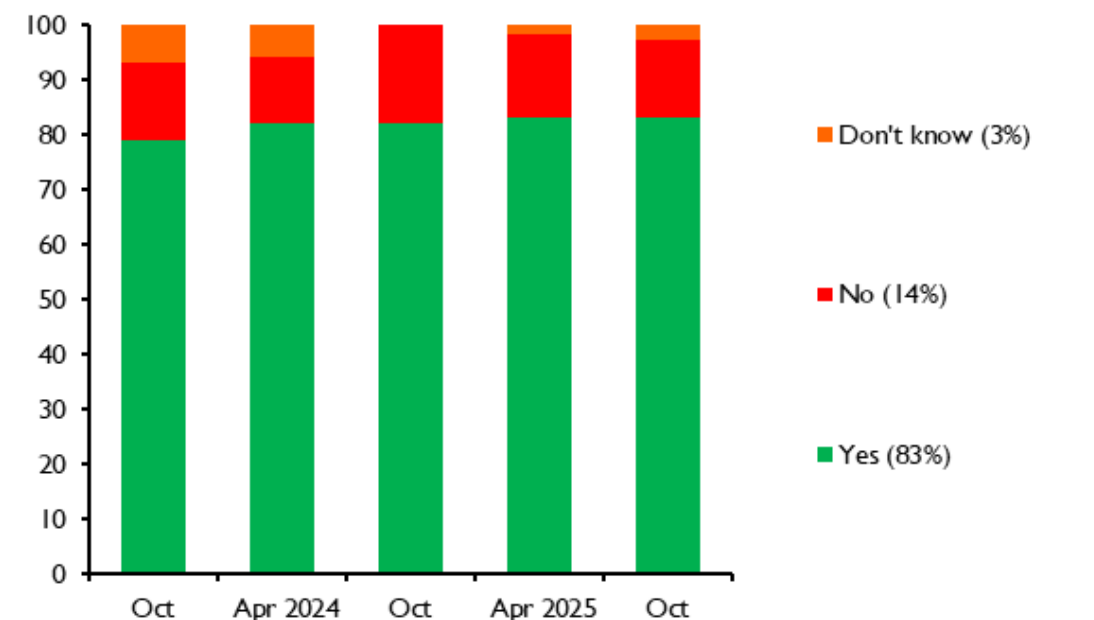
SUSTAINABILITY

MEASURING CARBON EMISSIONS

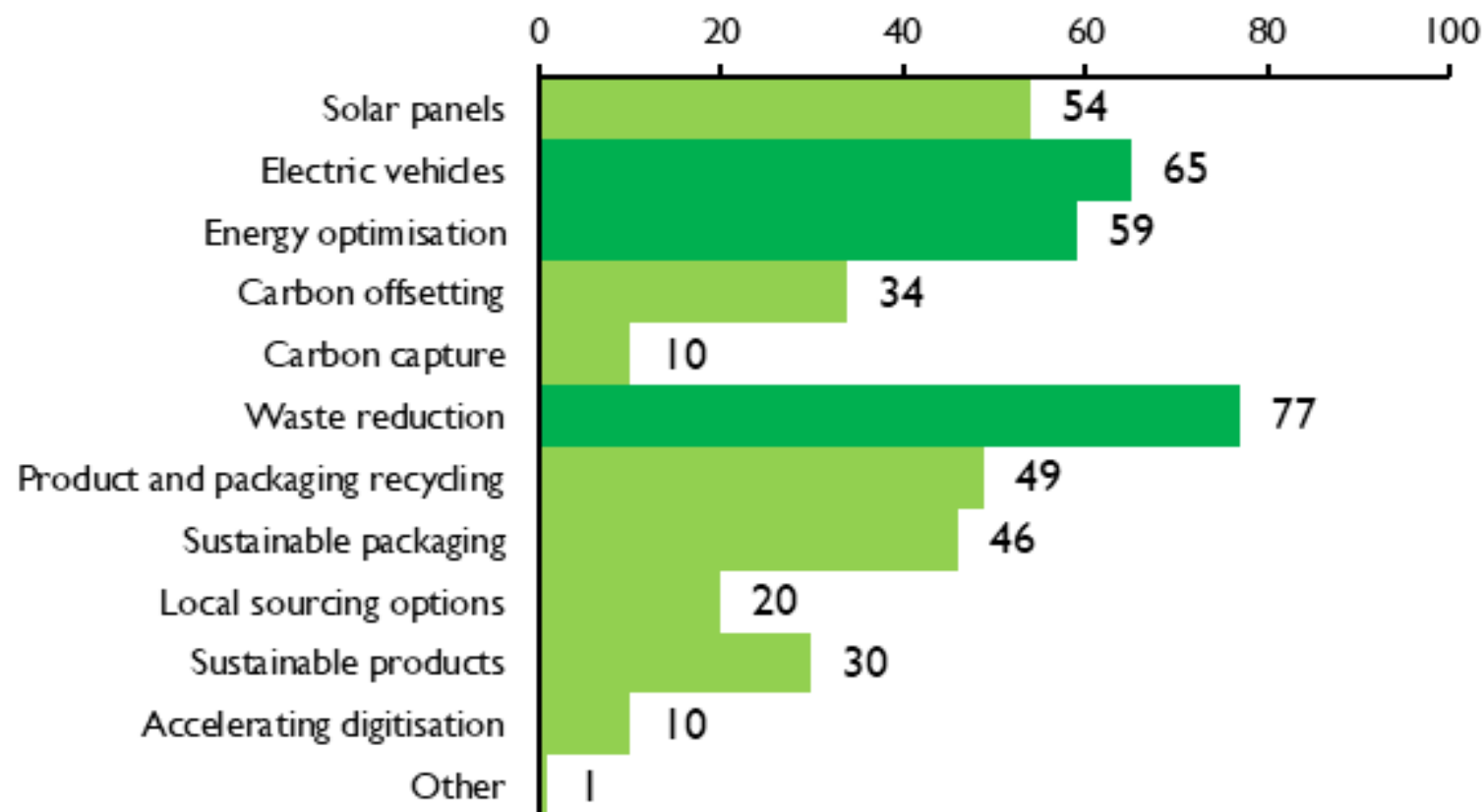


Source: BPIF Printing Outlook

REDUCING CARBON FOOTPRINT



Source: BPIF Printing Outlook

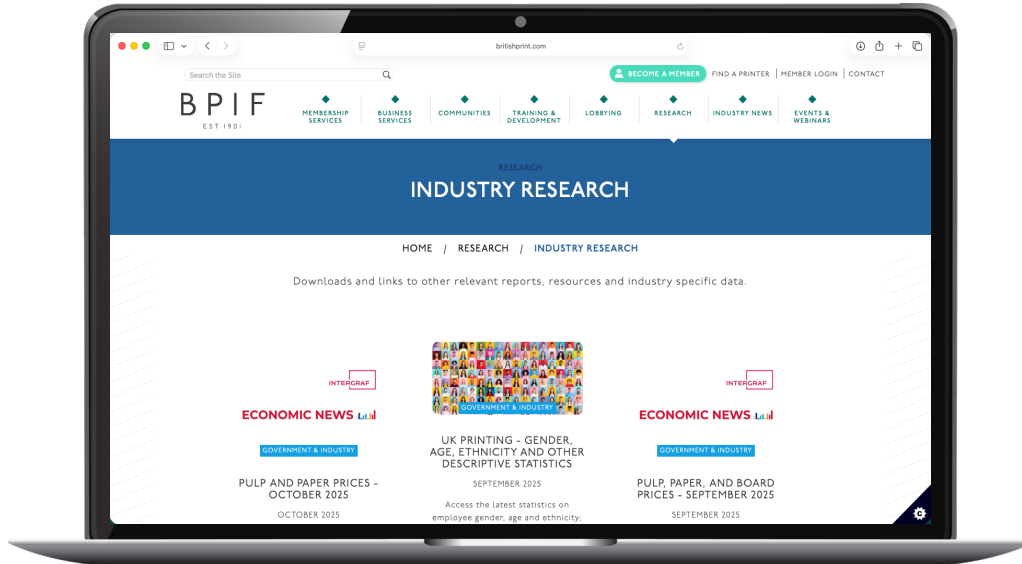


SUSTAINABILITY INVESTMENTS

Source: BPIF Printing Outlook

PRINTING INDUSTRY RESEARCH

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<https://www.britishprint.com/research/industry-research/>



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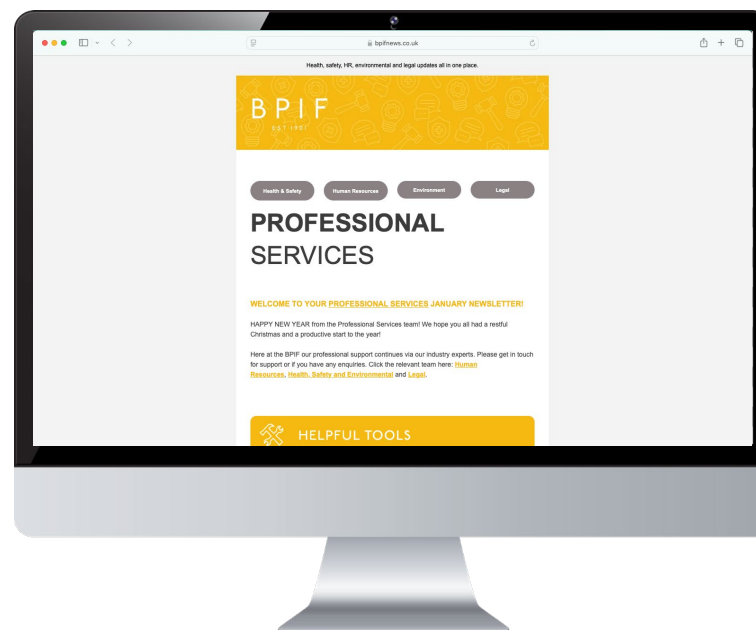
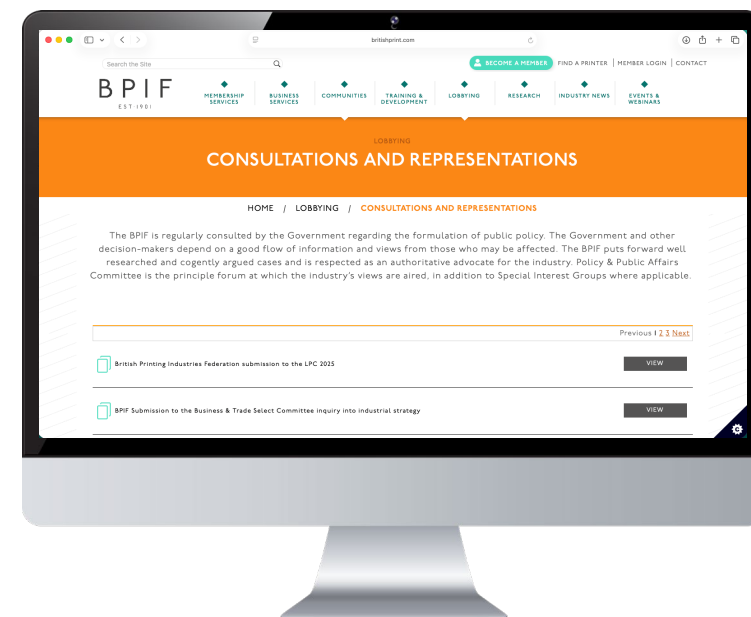
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Thank You

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