

BPIF

EST. 1901

PRIORITIES FOR PRINT

2022-2024

Printing is one of the UK's leading manufacturing sectors. Its success depends on your support.

PRINT HAS

POWER

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CEO'S MESSAGE

The last few years have been hugely challenging for the printing industry and manufacturing more widely. Covid has had a significant impact on print outputs across the world, with falls in print demand and changes in consumer behaviour – restaurant menus replaced with QR codes, paper tickets swapped for apps. The industry is recovering, but turnover is still lower than it was pre-pandemic.

By 2030, the print landscape will be very different than in the pre-Covid world. The volume of global print and printed packaging is expected to fall by 15%¹. But many companies will thrive by focusing on automation, efficiency and service, or by innovating and diversifying to widen the range of products and services they offer. For those that do thrive, the value of the market is predicted to grow by nearly 7%².

Print is bigger than pharmaceuticals
and furniture

¹Smithers (2020) The Future of Print in a Post-Covid World
²Smithers (2020) The Future of Print in a Post-Covid World



Here in the UK, despite the pandemic, print had a turnover of **£11.6bn** and a gross value added of **£4.8bn** in 2020 (more than pharmaceuticals and furniture).

Over **100,000** people are employed in print in **7,400** companies. And unlike many industries, it's an important economic contributor in all regions. Spread out across the UK, print is playing a part in levelling up the regions. The East Midlands, North West and Yorkshire/Humber regions all employ more people in print than London.

During the pandemic, engaging with Parliamentarians has been difficult. Business closures and social distancing have affected our members' relationships with their local representatives. But Priorities for Print 2022-24 marks the start of a reinvigoration of the relationship between the printing industry and Parliamentarians. We are willing and ready to engage, assist and inform. Working together we can help shape effective policy priorities that will work for our industry and for our country.

CHARLES JARROLD
CHIEF EXECUTIVE

Print is playing a
part in levelling up
the regions.

PRINT

IS....



SUSTAINABLE



SUCCESSFUL



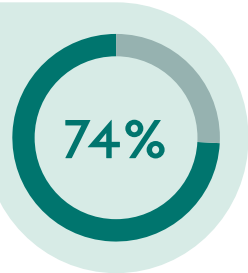
SKILLED

PRINT IS SUSTAINABLE

All industries can do more to reduce their carbon footprint and print is no exception. But it's a mistake to assume that the printing and paper industries aren't environmentally friendly. Paper is made from wood, a natural, renewable and sustainable resource. It ensures healthy growing forests, with an indispensable role in climate and biodiversity protection. Paper is also highly recyclable.

For our members, 'print is a sustainable, environmentally-friendly medium' is the number **one** message they want to communicate to political decision-makers.

Europe is the world leader when
it comes to recycling paper, with
74% of paper recycled in 2020.⁷



Print is a sustainable,
environmentally-friendly medium.

1



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.³



These forests supply over 90% of the wood used by the European paper industry.⁴



In Europe, print and paper products are one of the lowest industrial greenhouse gas emitters at 0.8%.⁵



In comparison, the ICT industry accounts for 2.5-3% of global greenhouse gas emissions. This is predicted to rise to 14% by 2040.⁶

³UN Food & Agriculture Organization, 2005-20
⁴Confederation of European Paper Industries, Key Statistics 2020
⁵European Environment Agency Annual European Union Greenhouse Gas Inventory 199-2018, 2020
⁶European Commission 2020
⁷Confederation of European Paper Industries, Key Statistics 2020

PRINT IS SUCCESSFUL

Print is a vital part of the UK's infrastructure, serving all parts of the UK economy – including central and local government, publishing, financial services, retailing, distribution, travel and tourism, manufacturing industries, food and drink and pharmaceuticals.

For our members, 'print is a significant contributor to the UK economy and employment' is the number **two** message they want to communicate to political decision-makers.

Print has a turnover of **£11.6bn** and a gross value added of **£4.8bn** in the UK (more than pharmaceuticals and furniture). Over **100,000** people are employed in print in **7,400** companies.

£

£11.6bn



100,000

+

£4.8bn



7,000

Print is a significant contributor to the UK economy and employment.

2

Print is also a highly successful way of communicating with the public.

3

Print is an essential, engaging and highly effective channel.

For our members, 'print is an essential, engaging and highly effective channel' is the number **three** message they want political decision-makers to know.

- ◆ Direct mail requires 21% less cognitive effort to process than digital media.⁸
- ◆ People remember print adverts better than digital adverts one week after encountering them.⁹
- ◆ Students who read texts in print scored significantly better on the reading comprehension test than students who read the texts digitally.¹⁰

⁸www.trueimpact.ca
⁹Venkatraman et al (2021) Relative effectiveness of print and digital advertising: A memory perspective
¹⁰Mangen et al (2013) 'Reading linear texts on paper versus computer screen: Effects on reading comprehension.'



PRINT IS → SKILLED

4

Print is a resilient, evolving and technologically advanced industry.

5

Print is an exciting, attractive career option for young people.

Print is an advanced manufacturing industry, using flexible workforces with specialist skills in science, technology, engineering, mathematics and design. Printers are adept at producing innovative products and solutions that enable their customers to access new markets.

For our members, 'print is a resilient, evolving and technologically advanced industry' is the number **four** message they want to communicate to political decision-makers. 'Print is an exciting, attractive career option for young people' is the **fifth** most important message.



Over 80% of the 105,000 jobs in UK print are skilled or semi-skilled.¹¹



Since 2012, nearly 2000 people have completed an apprenticeship in print and printed packaging.¹²



The top ten disruptive technologies in print over the next ten years are likely to be artificial intelligence, robotics/cobotics, 5G, augmented reality, digital print for packaging, blockchain and secure transaction, mono-materials in packaging, non-fossil fuel derived chemistries for inks, coatings and substrates, 3D printing and high coverage digital printing/coating technologies.¹³

¹¹Estimates based on BPIF research data
¹²Department for Education Data Catalogue (2021-22) and national achievements rates tables (2012-19)
¹³Smithers (2021) Ten Year Forecast of Disruptive Technologies in Print

OUR PRIORITIES FOR

PRINT



PRODUCTIVITY



PROFITABILITY



PROMOTION



→ PRODUCTIVITY

PROFITABILITY

Sustaining a high level of productivity requires Government to support businesses to invest in both people and assets.

Improving productivity was the third biggest business priority for our members for 2022. As the economy recovers from the pandemic, potential further lockdowns, low levels of activity from customers and health and safety restrictions remained important elements seen to determine productivity levels.



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“Our members are always enthusiastic about productivity gains (or making the most out of what they’ve got!) But Government’s got a part to play too – there’s much more it can and should do to encourage a general business environment which promotes productivity.”

**Dawn Reid, BPIF Regional Director
for the South West and Midlands**

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HOW GOVERNMENT CAN HELP

Support businesses to improve and, in some cases, transform productivity by investing in equipment and people by:

- ◆ Removing plant and machinery enhancements from sites’ rateable value when calculating business tax.
- ◆ Improving the Help to Grow Management initiative by including learning on the adoption of and investment in mixed media technologies, alongside digital. Complementing the Help to Grow funding by creating effective networks (both within print and cross-sector) through which developing managers can meet to exchange ideas, best practice and experience.
- ◆ Ensuring a new capital allowances regime to bring UK support into line with schemes in other European countries.
- ◆ Maintaining an increased level of Annual Investment Allowance after 2023.

Enabling an industry to thrive requires Government to foster a business environment that promotes competitiveness.

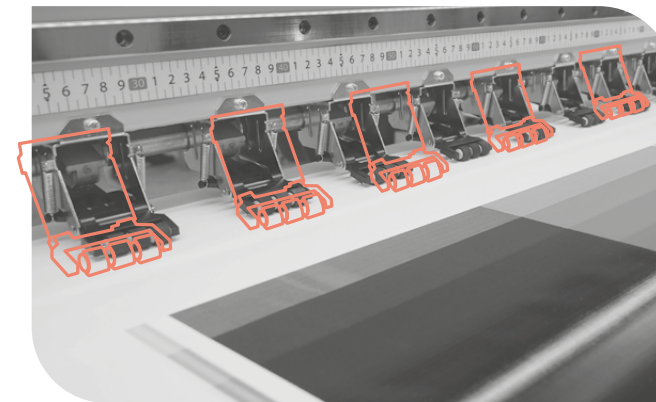
Improving profitability was the second most important business priority for our members for 2022 but the biggest barriers were the cost of raw materials, the cost of energy and the cost of haulage.

Nearly 70% of our members said

the cost of raw materials was

currently 'extremely important' to

the profitability of their business.



HOW GOVERNMENT CAN HELP

Government must recognise the impact of rising costs on businesses as well as on individual consumers, and act accordingly to help businesses to survive (and thrive) by:

- ◆ Acknowledging the impact of rising costs on firms as well as on individual consumers, including the costs for companies of protecting skills differentials when the National Living Wage and Minimum Wage increase.
- ◆ Helping businesses manage the impact of extreme energy prices by cutting VAT on their energy bills for a minimum of one year and ensuring that any revenue from a windfall tax on energy companies is used to alleviate cost pressures on businesses as well as households.
- ◆ Improve payment culture and reduce late payment, especially to small businesses, by:
 - Requiring all suppliers to the public sector to sign up to the Prompt Payment Code.
 - Banning requirements for long payment terms to be agreed by suppliers ahead of bidding for work.
 - Allowing third party representation to the Small Business Commissioner.
- ◆ Curb abuse of pre-packs by:
 - Conducting a thorough review of the effectiveness of the 2020 regulations.
 - Maintaining a list of evaluators who have been approved to carry out pre-pack processes.



PRODUCTIVITY
PROFITABILITY
→ PROMOTION

Encouraging a society that upholds literacy and democracy requires Government to promote and celebrate the power of print.

New customer acquisition was the biggest business priority for our members in 2022. But bringing in new customers relies on society's continued understanding of the important role of print and its effectiveness as a communications medium.

The reputation of the industry is also important for skills and recruitment. In this area, retaining key staff and recruiting new, highly skilled staff were the most important things to do for our members.



HOW GOVERNMENT CAN HELP

Government can support the reputation of the printing industry as being vital to society and an attractive career option, by:

- ◆ Recognising that print is often the best tool to convey information and demonstrating this by ensuring that all public sector communications remain available in hard copy.
- ◆ Cracking down on 'greenwashing' messages which falsely present print as unsustainable, or which assume that digital products are better for the environment than printed ones.
- ◆ Retaining a Climate Change Agreement for the sector to continue to reward improved environmental performance.
- ◆ Providing increased skills funding to enable print companies to adapt to technological change.
- ◆ Promoting manufacturing in general to young people as a worthwhile and satisfying career option.

“Younger generations don't necessarily know or understand there are careers in the print industry. We need to improve education and awareness at schools and colleges.”

BPIF Member

HOW YOU CAN HELP

There are more printing companies in
the UK than there are McDonalds in
Western Europe, so there's bound to
be one in your constituency!

- ◆ Visit a printer near you to find out more about the printing industry locally and nationally. Contact us at hello@bpif.org.uk to arrange a visit.
- ◆ Attend the Print Industry Reception in Parliament every July.
- ◆ In debates on the economy, employment, skills, training, inflation, costs and investment talk about the printing industry and how Government can support it. Contact hello@bpif.org.uk for briefing material.
- ◆ Visit our website www.britishprint.com to find out more.

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“It’s impossible to imagine fighting an election campaign without printed materials. The traditional election address leaflet, which drops through every single door before a general election, is vital to help voters make an informed choice. Social media is a useful tool, but when it comes to big decisions, my constituents want more than ever to receive a printed product to take their time over.”

Stephen Metcalfe MP

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ABOUT THE BPIF

The BPIF is the principal business support organisation representing the UK print, printed packaging and graphic communication industry. It is one of the country's leading trade associations.

Our members are over 1,000 companies operating in the £11.6bn UK printing industry. We provide the highest standard of support for printers to grow and develop healthy, sustainable and profitable businesses, aiming to provide an environment geared towards their business' success.

Where we can we work collaboratively to lobby for change. We are members of the Confederation of British Industry, the Graphics & Print Media Alliance and Make UK.

ABOUT PRIORITIES FOR PRINT

The BPIF truly speaks on behalf of the UK printing industry. Those 1,000+ members are printing companies of all shapes and sizes – in print, printed packaging and graphic communications. It's vital to our success that our lobbying activity reflects the diversity of voices within our industry.

To determine our lobbying priorities for 2022-24, the BPIF's Regional Boards – made up of member companies – were key in identifying problems and suggesting solutions. These were tested against the wider membership in an online survey at the start of 2022.

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(British Printing
Industries Federation)



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