

insert (FSI) and in-store promotional printing will have level demand. Smart packaging with nanotech features is appearing slower than anticipated as too few plants have the know-how and licenses to use these processes.

Related are No. 6-ranked **BEVERAGES** (\$471B, +5 percent; with \$10.4B to print, -4 percent) and No. 17-ranked **FOOD SERVICE** (\$800B, +7 percent; with \$5.6B to print, +6 percent). Metal decoration, screen printing, outdoor advertising and POS/

POP will pour with waters and infused, new-age drinks such as PrimoWater (+>300 percent). A new segment will be home-produced drinks introduced by Sodastream (+234 percent).

Event-driven and product-line extensions and mergers will shake and stir packaging and print POP and ROP in the wines and spirits segment. Campari (+23 percent) has made 16 acquisitions and plans to double U.S. advertising. Jack Daniels (+12 percent) and others will take leaps into P2M employing localized relationship marketing.

Beers/malt beverages will foam up as Budweiser (+4 percent) upgrades and expands its breweries in the 2012-2014 time frame. It will regain share by acquiring micro-brewer brands from Hawaii to Puerto Rico. Molson Coors (+2 percent) will raise in-store ad spending as it tries to gain space against Bud.

Also brewing will be coffees and teas where new enhanced brands, such as Organo Gold (+>300 percent), will become billion-dollar sellers with multimillions in print buys. Starbucks (+19 percent) will build new stores offering “evolutionary” pure juices. Signage, labels, coupons and FSIs will bubble forth. Mainstay carbonated soft drinks producers Coca-Cola (+13), PepsiCo (+12 percent) and National Beverage (+4 percent) will be flat in their print buys.

Eating out is rounding up to two nights a week. Casual dining establishments will serve more nutritious entrées and promote dining “experiences” to outperform the fast food/take-out segment, as in Chipotle (+20 percent) vs. McDonald’s (+7 percent). Burger King (-6 percent) will reinvent its print-intensive Kid’s Crown program, freshen up its food offerings and speed up the remodeling of 12,300 stores.

Going upscale will be full-service restaurants, which are mostly regional and independent except for the largest—Darden (+8 percent). The print-to-mobile model for reservations, menus and directions will be appetizing for the printing industry as companies expand into setting up and managing VIP-themed events, loyalty programs and push messaging to opt-in diners.

FSIs, in-store and outdoor print will otherwise be lost to e-providers such as OpenTable (+43 percent), which only recently set up a mobile platform. Automated vending, reminiscent of “Automats” in days’ past, will reappear (with screen and package printing benefiting) as next-gen machines prepare complex recipe foods and beverages

Hot Markets for 2012-2013

Ranking of Demand Sectors and Categories by Print Potential (2012)

Rank	Category	Revenue Forecast*	Growth Rate	Share-to-print	Print Potential*	Print % Change
1	Packaged Foods	\$1,110	6%	<1.4%	\$15.955	0
2	Medical/Pharmaceuticals	450	4	3.0	13.500	-3
3	Banking/Insurance	3,729	2	<0.3	11.187	-16
4	Publishing/Non-Newspaper	78	-6	14.0	10.924	-10
5	Telecommunications	1,383	9	< 0.8	10.900	1
6	Beverages	471	5	2.2	10.362	-4
7	Real Estate	1,916	-6	>0.5	10.123	1
8	Computerware	673	9	1.3	8.977	-9
9	Health Providers	3,096	4	0.2	8.968	6
10	Automotive	1,885	3	<0.5	8.953	4
11	Travel/Hospitality	830	4	0.9	7.470	5
12	Gaming/Wagering	663	3	>1.1	7.461	<6
13	Fashion	566	<2	1.3	7.300	-8
14	Entertainment	888	5	<0.7	5.918	7
15	Personal Care	382	4	1.5	5.730	-1
16	Investment/Brokerage	1,145	4	0.5	5.725	0
17	Food Service	800	7	0.7	5.600	6
18	Discount Retail	1,305	5	0.4	4.955	0
19	Home Improvements	733	5	<0.7	4.881	13
20	Electronics	769	7	>0.5	4.190	16
21	Security/Protection	220	1	<1.9	4.098	-1
22	Leisure Activity	189	0	2.1	4.017	10
23	Logistics/Freight	670	7	0.1	4.000	-7
24	Government/Federal and State	6,175	3	<0.4	2.450	-15
25	Elections/Political Action	11	380	15.0	1.685	>500
	TOTALS/AVERAGES - Hot Markets	\$30,137	—	0.6	\$186.276	<-2
	LESS: OVERLAP	-23,881	—	—	—	—
	ADD: OTHER CATEGORIES	9,429	—	<0.3	13.057	-12
	TOTALS/AVERAGES - ALL	\$15,685	2	<0.2	\$199.333	-2

*Dollar data in U.S. billions.