

Hot Markets for 2013-2014

RANKINGS OF DEMAND SECTORS BY PRINT POTENTIAL (2013)

Rank	Category	Revenue Forecast*	Growth Rate	Printing Trend	Share-to-print	Print Potential*	Print % Change
1	Packaged Foods	\$1,151	4%	▲	1.5%	\$17.818	11%
2	Medical/Pharmaceuticals	471	5	▲	3.0	14.600	8
3	Publishing/Non-Newspaper	78	0	▶	14.9	11.611	6
4	Banking/Insurance	3,986	7	▶	0.3	11.605	4
5	Telecommunications	1,477	7	▶	0.8	11.486	5
6	Beverages	499	6	▶	2.2	10.876	2
7	Real Estate	1,950	2	▶	0.5	10.442	4
8	Health Providers	3,246	5	▲	0.3	9.451	5
9	Computerware	757	>12	▲	0.1	8.997	0
10	Automotive	1,962	4	▶	0.5	8.969	<1
11	Travel/Hospitality	872	5	▶	0.9	7.872	3
12	Gaming/Wagering	655	-2	▼	1.1	7.400	0
13	Fashion	600	6	▲	1.2	7.033	11
14	Entertainment	888	5	▲	<0.7	5.918	7
15	Food Services	827	3	▲	1.5	5.921	5
16	Personal Care	390	2	▶	0.5	5.888	4
17	Discount Retail	1,386	6	▲	0.4	5.611	4
18	Investment/Brokerage	1,203	5	▶	0.4	5.567	-3
19	Home Improvements	735	0	▶	0.7	5.145	2
20	Electronics	793	3	▶	0.5	4.599	10
21	Security/Protection	220	0	▶	2.1	4.544	9
22	Leisure Activity	194	3	▶	2.1	4.055	2
23	Logistics/Freight	709	6	▼	0.6	3.922	-2
24	Government/Federal & State	6,460	6	▼	<0.4	2.009	-18
25	Religion/Charity	183	1	▲	1.0	1.868	2
TOTALS/AVERAGES – HM		\$31,692	-	▼	0.6	\$193.207	-3
LESS: NET OVERLAP/OTHER		-15,703	-	-	-	9.221	-12
TOTALS/AVERAGES - ALL		\$15,989	2	▼	0.1	\$202.428	<3

*Dollar Data in U.S. Billions

+>12 percent; with \$9B to print, +0 percent) and No. 20 **ELECTRONICS** (\$793B, +3 percent; with \$4.6B to print, +10 percent). Retail signage and standee displays, primarily directed at the exponentially expanding population of gamers, will be winners for board printers, laminators and die cutters. Reflective and animated inks, special coatings and easy-to-assemble POP may make engineers out of us, but the payout is big. FSIs will continue at last years' volumes to jolt back declining sales of PCs, consoles and 3D TVs.

Raising the roof on promotion, though still in a no-growth basement, is **REAL ESTATE** (\$1.95T, +2 percent; with \$10.4B to print, +4 percent) at No. 7. Residential new and resale housing will not recover, therefore building volumes of open web and sheetfed home-buyer guides. Add digitally personalized, short-run viewbooks for the suffering commercial real estate segment. Malls, high-rises and strips will exchange in many languages.

Stalled at No. 10 is **AUTOMOTIVE** (\$1.96T, +4 percent; with \$9.0B to print, +<1 percent). No one is in the showroom despite POS, bind-in inserts, ROP, floor graphics and grand-format outdoor. VDP will drive some motorists to trade-in, but more to shift to auto parts/repairs to keep their present cars running. FSIs, in-store and out-of-home print will idle.

TRAVEL/HOSPITALITY (\$872B, +5 percent; with \$7.9B to print, +3 percent) checks in at No. 11. Loyalty programs with transpromo print reinforcement will return; direct mail over e-mail. Hotels and resorts are upgrading properties and both ROP and bind-in print as the new formula is lower occupancy and higher room rates—perhaps a model learned from the paper industry. Transit, in-room publications, screen signage, outdoor, and large-format POS will level.

At No. 12 is **GAMING/WAGERING** (\$655B, -2 percent; with \$7.4B to print, +0 percent). Bets are off as this over-built and under-payout industry craps out. Casinos and on-track/off-track betting will cut personalized print CRM, but ante up outdoor and ROP in pursuit of new and return traffic.

FASHION (\$600B, +6 percent; with \$7B to print, +11 percent) is size No. 13 in '13. Dressing up windows and walls will be wide-format digital and screen on clear and opaque cling substrates with five to seven metallic and neon color stations. New hybrid presses will bring about a resurgence of catalogs and bind-in inserts wearing spot textures and parade-runway articulation. Prêt-a-porter QRCs, sound paper and TXTs in a P2M sequence will push-message followups and transactional capability.

At No. 14 is **ENTERTAINMENT** (\$888B, +5 percent; with \$5.9B to print, +7 percent). Consumers, needing relief from the steady stream of real-world violence, will virtualize via streaming media (+12 percent), but at leveling participation