



## Member Advantage

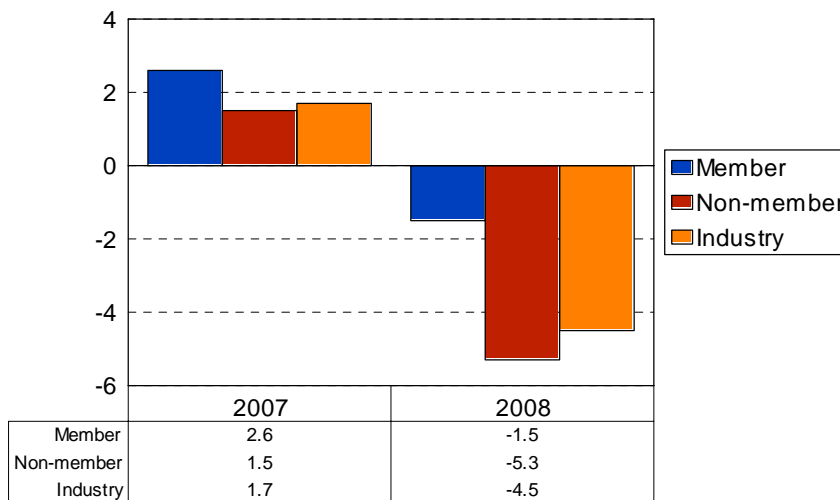
Printing Industries of America analysis shows that members outperform the overall printing industry in terms of sales and financial performance. This advantage means members are much more likely to remain in business and capture the market shares of those printers that go out of business as the industry adjust to changing economic and competitive pressures.

### Member Advantage in Sales

In 2007 and 2008 Printing Industries of America members outperformed overall industry sales trends. In 2007 member sales increased, on average, by 53 percent more than all printers and by 73 percent more than non-members. In 2008 the *Great Recession* reduced total industry sales by 4.5 percent and non-members printers by an average of 5.3 percent. In contrast, members sales declined only by an average of 1.5 percent.

## Annual Sales Change

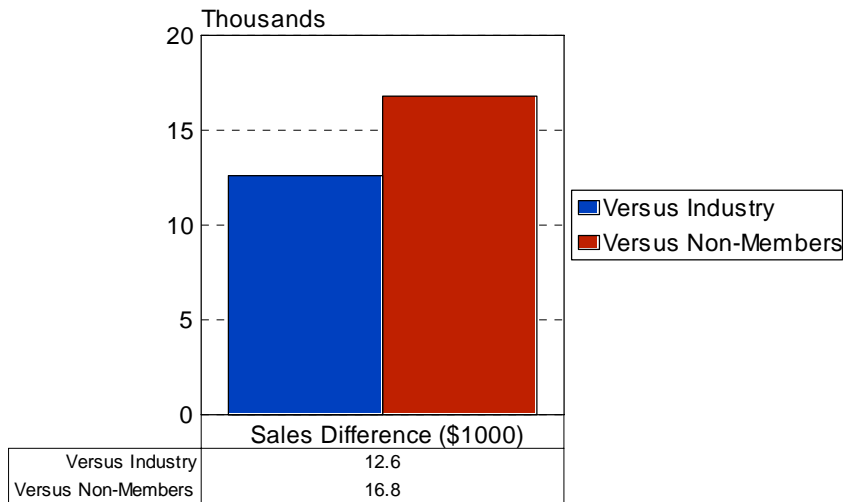
Members vs Non-Members



The sales advantage continued for 2009. Although total industry sales decreased significantly in 2009, a comparison of members and non-members of the same size as the average size printer shows a significant advantage for members in sales performance. In 2009 a typical member retained over \$12,000 more in sales than the average US printer and almost \$17,000 more than the average non-member.

# Member Advantage: Sales

2009 Sales Change--Average Size Printer

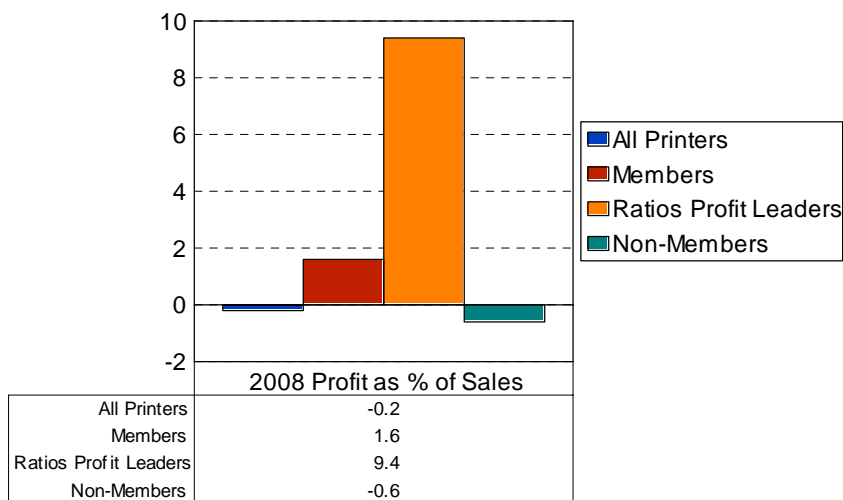


## Financial Performance

Although 2008 was a very difficult year for all printers, Printing Industries of America members achieved significantly better financial performance than non-members. In fact, members, on average, earned positive profits for the year while the overall industry and non-members experienced a loss. In particular, our *Ratios* program, including the newly launched *Financial Ratios Electronic Dashboard (FRED)* can help members become profit leaders and significantly outperform their peers. Indeed, in 2008 *Ratios Profit Leaders* earned an average profit on sales of 9.4 percent.

# Member Advantage: Profit %

2008 Profit as a % of Sales



Another indicator of the profit impact of membership is the difference in dollars of profit for an average size U.S. printing plant (\$4.6 million in annual sales). A member of that size earned over \$82,000 more than the average printer in the US and more than \$100,000 more than a similar sized non-member.

## Member Advantage: Profit \$

2008 Profits--Average Size Printer

