



# The State of the Book Industry 2022



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## EXECUTIVE SUMMARY

The State of the Book Industry 2022 provides an overview and examination of current trends and issues impacting US book manufacturers. The book manufacturing industry overall is in a strong position, with demand at very high levels and physical books experiencing a resurgence among consumers. However, despite the optimism that the renewed enthusiasm for books has brought to the industry, book manufacturers face a bevy of obstacles presented by this increased demand. Shortages in labor and paper have made book production increasingly challenging, as the industry struggles to find essential human and material resources.

With an imbalance of too little supply for exceptionally high demand, efficiency in production has become a top priority, and book manufacturers are turning toward automation as a key strategy to adapt to these difficulties. In this report, these key trends and challenges will be examined, along with the economic state of the book manufacturing industry. The report will conclude with recommendations for book manufacturers for the year ahead.

## INDUSTRY SNAPSHOTS

If there's one defining trend representative of the book industry in 2022, it is the soaring demand for a wide variety of books. NPD, which provides data and analytics across several industries, tracks book sales through its annual NPD BookScan tool, which indicated a record-breaking year in 2021. In fact, [NPD reports that annual volume rose 9% over that of 2020 to 825.7 million](#), which, NPD adds, marks the first time annual sales volume broke the 800 million mark.

The upward trajectory of the printed book market is a continuation of the momentum the industry gained in 2020, a year in which the COVID-19 pandemic kept consumers at home and drove a renewed interest in reading. In 2020, the pandemic, a highly contentious election, and rising social unrest all helped drive what NPD describes as the best-selling year for the book industry in a decade.

“Sales growth came in waves, from the sudden need to educate kids at home, to the super-heated political cycle,” Kristen McLean, a book industry analyst for NPD, said in a January 2021 press release. “All of the additional time people spent at home created a big appetite for reading, including huge spikes in sales of cookbooks and do-it-yourself books, which helped people stay entertained and engaged.”

The pandemic again fueled the industry's record-breaking 2021. McLean writes that the continued time spent at home prior to the vaccination rollout, the child tax credit, and a rejuvenation of the nation's collective mental state after the election all helped maintain the industry's success.

While the unprecedented demand for books and book production has been a boon for the manufacturing segment of the business, this demand influx has not come without its share of challenges. Pandemic-driven drastic shortages of both available labor and materials, including paper, have left book manufacturers scrambling to keep up.



On the labor front, a very low national unemployment rate has resulted in exceptional difficulties in hiring additional workforce. According to the Bureau of Labor Statistics' (BLS) January 2022 Employment Situation report, the national unemployment rate is 4%, a 2.4 percentage point decrease over the preceding year. Though the employment numbers represent a nation returning to normalcy amidst the COVID-19 pandemic, the diminished labor pool has made it difficult for book manufacturers to add manpower during a time of such high demand. In fact, at the end of December 2021, BLS reported there were 10.9 million available jobs and just 6.3 million unemployed people.

While the book manufacturing industry competes against numerous other labor-strapped segments for a limited pool of available workers, current employees are feeling the impacts of supply chain shortages that have left the industry scrambling for paper. The statistics on paper availability are startling. According to [Quad's Postal, Paper, Logistics Updates](#) released on Feb. 3, 2022, nearly half of coated groundwood production capacity has been closed since 2019. Meanwhile, nearly 30% of coated freesheet production has halted in this same window, along with 22% to 40% of uncoated grades.

The combination of labor and material shortages is driving book manufacturers toward continuous improvement strategies such as optimizing workflow, investing in automation, and assessing the areas of the production process that would benefit most from increased efficiency.

"The stress of the supply chain has forced us to be better manufacturers," Dave McCree, CEO of Lakeside Book Company, the largest North American book manufacturer, said. "We have more demand than supply, so we have stress on labor. The situation that we're in is we have customers that want product and we can't get it out. So how are we going to go about fixing that?"

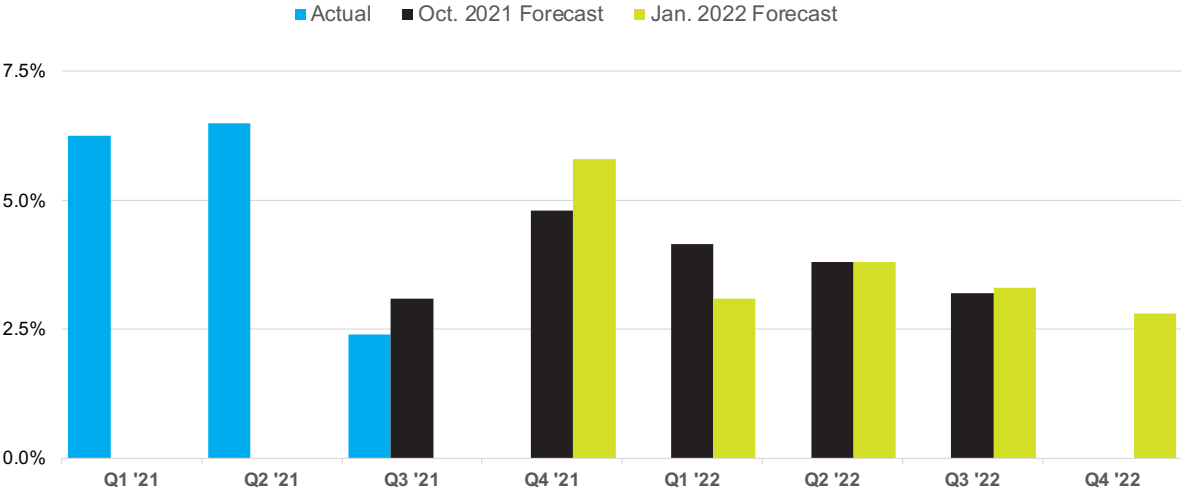


# OVERALL ECONOMIC TRENDS

The United States economy experienced significant growth in 2021, and toward the end of the year, expectations were high for 2022. But once again, a flare-up of COVID-19 cases around the world limited the expected economic rebound. The vaccine rollout in early 2021 led to a summer of near normalcy compared to what the nation experienced in 2020. But as the Delta variant wreaked havoc around the world, followed quickly thereafter by the Omicron variant, it became clear that the volatility of COVID-19 would continue to impact the economy.

In fact, [as reported by The Wall Street Journal in January 2022](#), the effects of Omicron combined with increasing inflation caused economic forecasters with the *Journal* to cut their expected annual growth rate for the first quarter of 2022 to 3%, down from the 4.2% expectation from the October 2021 survey. The *Journal* report adds that the annual growth forecast was cut as well, down to 3.3% from the 3.6% expected in October.

**Figure 1: Slower Growth**  
Economists have sharply cut their forecasts for growth in the first quarter of the year



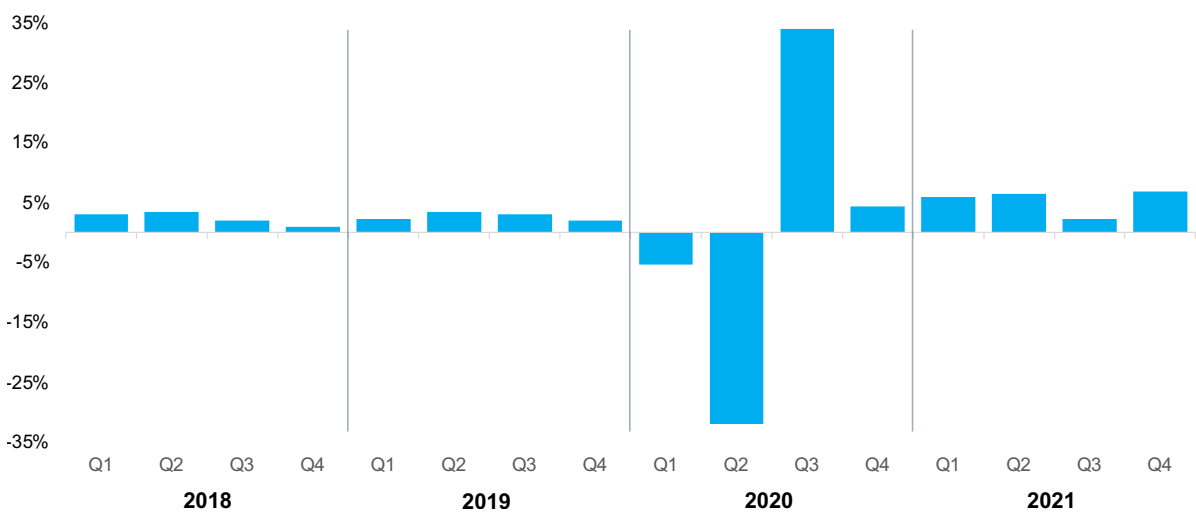
Source: U.S. Commerce Department (actual); Wall Street Journal Economics Forecasting Survey of 69 economists, Jan. 7-11, 2022



From a GDP perspective, the overall U.S. economy is continuing to rebound from the pandemic-induced downturn in 2020. According to the [Bureau of Economic Analysis](#) (BEA), real GDP increased 5.7% from the 2020 annual level to the 2021 annual level, a positive reversal of the 3.4% decrease in 2020. However, the trends of the year overall reflected the continued unpredictable nature of COVID-19.

GDP saw increases in percent change from Q4 of 2020 through Q2 of 2021. And while Q3 2021 did see an increase of 2.3%, it was a slowdown from the 6.3% and 6.7% increases from the prior two quarters. As the BEA notes, the surge of COVID-19 cases toward the end of 2021 led to disruptions throughout the economy as many consumers reenacted some level of the personal restrictions that were seen earlier in the pandemic. Additionally, an already taxed workforce was hit even harder as Delta and Omicron infections kept swaths of employees at home to recover.

**Figure 2: Real GDP: Percent Change from Preceding Quarter**



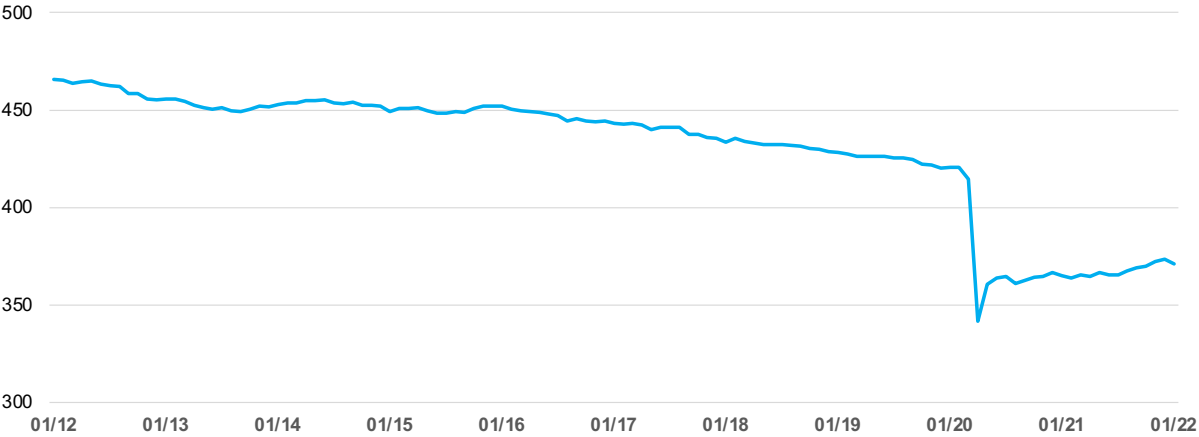
Source: U.S. Bureau of Economic Analysis. Seasonally adjusted at annual rates



# PRINTING AND PUBLISHING ECONOMIC IMPACT

The commercial printing industry has seen a significant drop in employment in recent years, exacerbated by COVID-19. The most drastic drop occurred between February and April 2020 as the first COVID-19 surge struck North America. [Per the Bureau of Labor Statistics](#), employment in the segment plummeted from approximately 420,400 to 341,400. While those numbers have ticked up slightly with preliminary data indicating approximately 371,400 employees as of February 2022, it is unlikely that a full recovery will occur in the near future.

**Figure 3: Printing Industry Employee Levels, in Thousands**



Source: U.S. Bureau of Labor Statistics



While recovering 80,000 jobs would be immensely challenging for any industry, the printing industry has struggled to replace this loss of human resources due to a variety of factors. One of these factors, which has plagued the industry prior to the pandemic, is the significant misconception of what a career in the print industry entails.

Like other manufacturing businesses, book printing has struggled with job candidates correlating it with the heavy machinery-based industry of years past. The reality, however, is that the equipment used in book printing and manufacturing is now highly digitized, and the process is based more in technology than manual labor. It is also an industry that produces products that bring joy to those that consume them, and one that employees tend to take pride of ownership in when they see a book that they had a hand in producing.

McCree cited the creation of a video asset that the company uses in recruiting. Throughout the video, the company’s employees share their pride in their work and the impact that it has on the community overall.

“We did a three-minute video that talks about who we are,” he said. “You hear employees talk about pride in what they do and the fact that they can walk through a bookstore or surf Amazon, and they can see products and say, ‘I made that.’ That’s a pretty cool feeling and is starting to build back that pride in what we’re doing not only as individuals in individual jobs, but also as an industry.”

While this sort of outreach will help lead to the change in employee perception the print industry needs to attract new workers, the reality compounding this issue is that there are fewer workers than ever available to fill the gaps in the industry. With such low unemployment numbers (4% nationally), not only is it exceedingly difficult to fill positions, but book manufacturers are finding that when they are able to make a hire, it's often not of the caliber they desire.

The Bureau of Labor Statistics considers a person to be among the “long-term unemployed” if he or she has been unemployed for 27 weeks or longer. There are many reasons why a person may be long-term unemployed, but the reality many hiring managers are facing is that those who have not been able to maintain work for an extended period often do not make the best candidates for an available position. BLS reported that in February 2022, the percentage of long-term unemployed people among the total of unemployed was 26.7%. With more than a quarter of the available labor pool — which is miniscule as is — long-term unemployed, candidates with strong work histories are even more difficult to find.

“You’re dealing with an extremely low unemployment rate, so you’re taking a chance on a lot of folks that probably don’t have the best work history,” Jim Fetherston, president and CEO of Worzalla, an approximately 400-employee book manufacturing company based in Stevens Point, Wisconsin, said. “We have a very low turnover rate for employees over one year, but the turnover rate for employees under one year is extraordinarily high. You need to go through those folks to find one out of three that says, ‘This is a great place to work. I really like it. I’m going to stick around,’ versus the ones that spend two weeks here and then quit.”

For employees that manufacturers are able to attract and retain, compensation has seen significant increases in recent years. [According to the Bureau of Labor Statistics](#), wages and salaries in the United States increased 4.5% in 2021, following a 2.6% increase in 2020.

“Wages are shooting up,” another executive at a book manufacturing company of approximately 150 employees said. “Which in my mind is not a bad thing. You need people to make a living. But the way we have to compensate for that is obvious. We have to increase prices to the publishers. We can’t absorb that. We have to make the adjustments, and we do with a yearly price increase.”

## SUPPLY CHAIN

Global supply chains are strained in unprecedented ways, and the book manufacturing industry has certainly not been immune to the disruptions. Perhaps most pressingly, a lack of paper has confounded the book segment, making it exceptionally difficult to meet the high demand for printed books. With an essential material for book making in such short supply, book manufacturers have been relegated to making the best with what is available.

The diminished paper quantity has made efficiency of operations increasingly important. As McCree described, the supply chain constraints have led to a need for continuous improvement at all levels of production. This starts with synchronizing schedules across paper and other components, and includes assessing the efficiency of operation in each piece of equipment on the floor.





“[We’re] making sure that we’re driving continuous improvement methodologies on specific pieces of equipment,” he said. “How do we run the equipment better? How are we more efficient in every step of the process that it takes to make a book? It’s not only synching up the supply chain, paper, components, printing, and binding. It’s also in each step of the process becoming more efficient in how we’re running the equipment. By doing that, we can obviously get more product through the system to get the product to the customers, which is the deal at the end of the day. That’s the critical part.”

Other approaches include proactively stocking up on paper when possible. While mills have cut capacity and are turning to higher-margin products, such as paperboard for packaging, acquiring more paper than may have been necessary prior to the pandemic can help in providing a temporary safety net.

Fetherston said that his company made the decision earlier in the pandemic to carry a level of paper inventory above and beyond what the company would typically be comfortable with. He explained that the foreshadowing of the supply chain constraints ultimately led to a highly beneficial decision for the company, but at the time it felt like a nerve-wracking bet.

“[We were] seeing this thing and making a bet that it was going to get worse before it got better,” he said. “I agreed to significantly increase our inventories so we would have more paper on board. It was a tough decision because it was a big investment in dollars. But in retrospect, we’re really glad we did. It’s allowed us to weather the storm a little bit better.”

In the meantime, frequent communication between book manufacturers and customers is essential in maintaining expectations. Aside from persistently calling paper suppliers, there is little book manufacturers can do in the current environment to acquire more paper.

Of course, a lack of material will lead to challenges in meeting the high demand for books, so keeping customers in the loop by providing frequent updates on when a product can realistically be delivered will help maintain a good relationship and will help avoid sudden surprises when it comes to delays.

“If you don’t have that out of the gate and your communication is poor, you’re really in trouble then,” the executive of the 150-employee company said. “You know you’re going to underdeliver. You know you’re going to have some customers that are agitated and not satisfied. [You need to] try to make them as comfortable as possible with the situation that you’re dealing with. To me, that’s mission number one.”

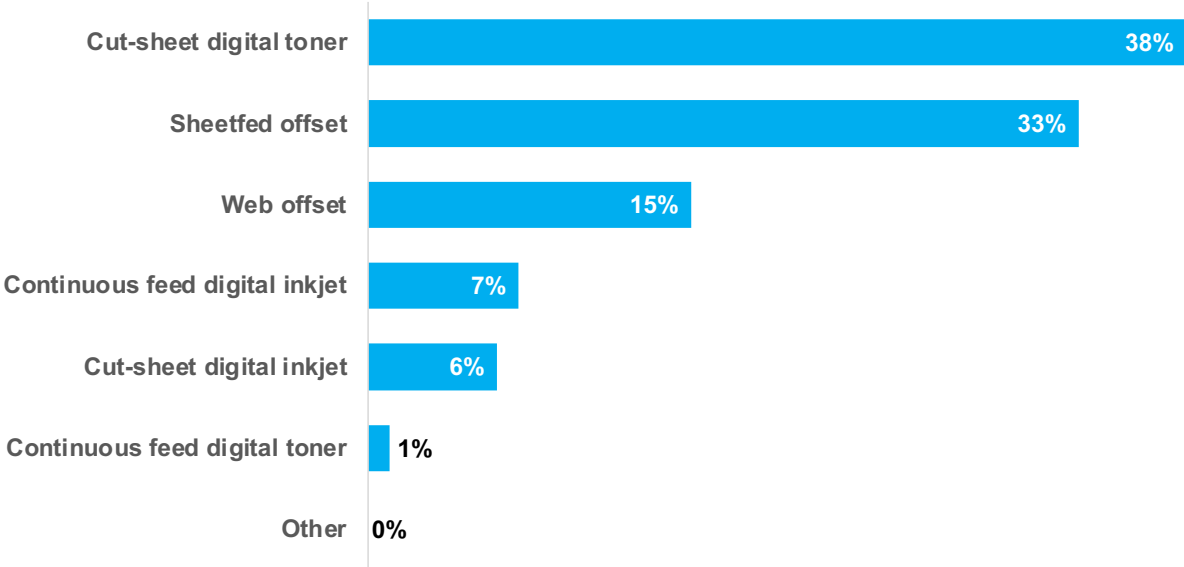


# INVESTING IN AUTOMATION AND EFFICIENCY

With an unprecedented lack of labor and materials across the printing industry, print service providers in all segments are turning toward automated technologies and digitized workflow. For many of these printers, turning toward automation has been a necessary reaction, born not out of a desire to replace human work, but to maintain production in areas where human resources have not been available.

Across the printing industry, digital technology has emerged as a key solution for increasing efficiency in production. In fact, in a 2021 NAPCO Research survey that was sponsored by the Book Manufacturers Institute, respondents stated that on average 38% of their books are printed on cut-sheet toner devices, while 13% are printed on inkjet (7% on continuous feed and 6% on cut-sheet). Of particular note, 48% of respondents stated they currently print at least some quantity of books on production inkjet equipment, an encouraging statistic given the technology's newness in the segment relative to toner.

**Figure 4: Printing Methods Used to Produce Books**



*Q. Of the books you print TODAY, what percentage are produced via the following printing methods?  
n=21 Book printers  
Source: The Role of Inkjet Printing and Automation in Powering Industry 4.0 in Book Publishing, NAPCO Research/BMI, 2021*

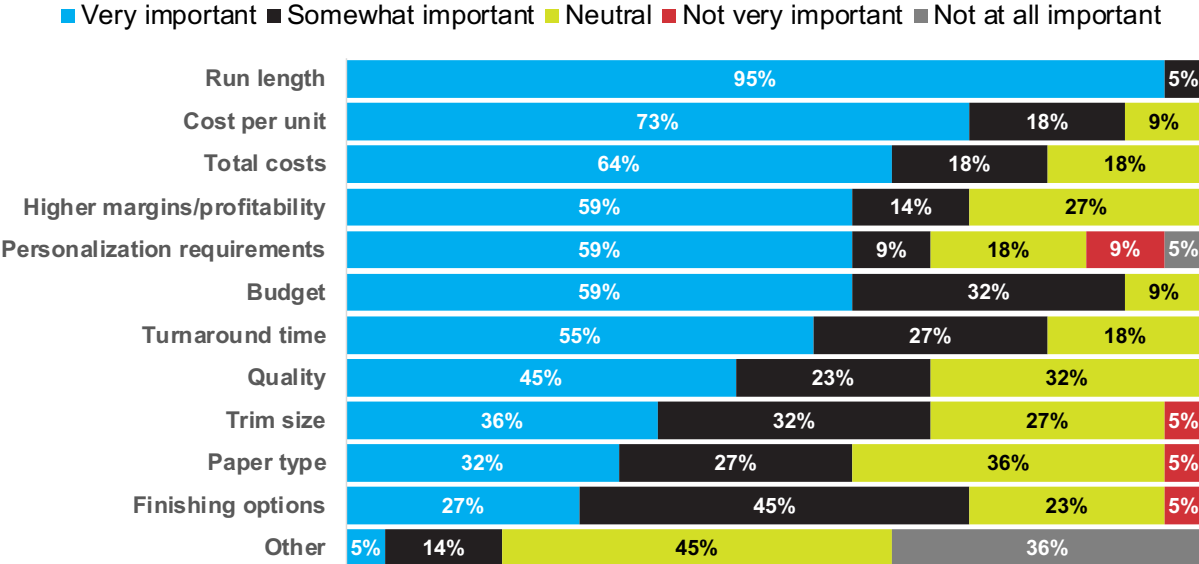


The reasons that respondents gave for investing in inkjet tell the story of how important efficiency is in today's book manufacturing landscape. Sixty percent stated that accommodating demand for shorter runs was a top driver toward the technology, while 50% stated that improving workflow efficiency was a top driver. These two decision points are related, however, in that the industry's recent influx of short runs has led to slowdowns in efficiency as printers contend with increased changeovers and more files to manage through the production process.

The survey also asked respondents who use both offset and digital equipment to produce books what the key driving factors are in deciding which technology to use to produce a particular run. The overwhelming majority of respondents (95%) stated that run length was a “very important” consideration in deciding whether to print offset or digital. From an efficiency standpoint, the run length factor is imperative. With short runs becoming increasingly common across print, digital-production solutions, whether electrophotographic or inkjet, are typically more efficient platforms as they require no plates and minimal changeover.

Meanwhile, transitioning shorter-run work to digital frees up book manufacturers’ offset assets to take on the long runs that would not be cost effective to produce on digital. Seventy-three percent of respondents stated that cost per unit is a key driving factor in the offset-versus-digital decision, and 64% stated total costs were a top decision driver. By strategically optimizing the use of offset and digital assets, book manufacturers can maximize both efficiency and costs.

### Figure 5: Key Decision Factors in Offset vs. Digital Process Selection



Q. What are the key decision factors in deciding between printing a book on an offset versus digital press?  
 n=22 Book printers  
 Source: The Role of Inkjet Printing and Automation in Powering Industry 4.0 in Book Publishing, NAPCO Research/BMI, 2021



## BOOK DEMAND ON THE RISE: SEGMENTS TO WATCH

Despite the challenges book manufacturers are facing in production, demand for printed books is soaring. While keeping up with this high demand is certainly a challenge amidst the overall trends in the industry, book manufacturers can at least take solace in understanding that they are producing a highly desired product.

In March 2020, as North American COVID-19 quarantines began to set in, the shutdowns and increased time spent at home led consumers to find new ways to occupy their time. Many ramped up their book consumption, while others who might not have been avid readers prior to the pandemic saw the opportunity amidst the crisis to kick-start their own reading goals.

“Folks were reading more,” McCree said. “They were staying home for whatever reasons, whether they were actually sick or just staying out of the mix. That was driving people to books, and that helped drive demand.”

The data demonstrates just how much of an impact COVID-19 had on the book industry. According to data published by the Association of American Publishers in December 2020 and [cited by \*Publishing Research Quarterly\*](#), sales in the trade publishing sector increased 7.5% from 2019 through October 2020. The research points out that this substantial jump came on the heels of a 0.4% increase in 2019.

Another change in the book segment that is driving the influx of demand is the continued rise of what is commonly referred to as custom publishing, self-publishing, or vanity publishing. This practice, in which authors pay to have their works published, has lowered the barriers of entry in book publishing, leading to more titles existing in the marketplace. Much like other formerly analog industries, publishing has pivoted to digital processes, with online publishing opportunities available through services including Amazon and IngramSpark.

These services, combined with the rise of digital printing, make producing these texts increasingly viable, as book manufacturers can now cost-effectively produce the short runs of books that are often the result of self-published works.

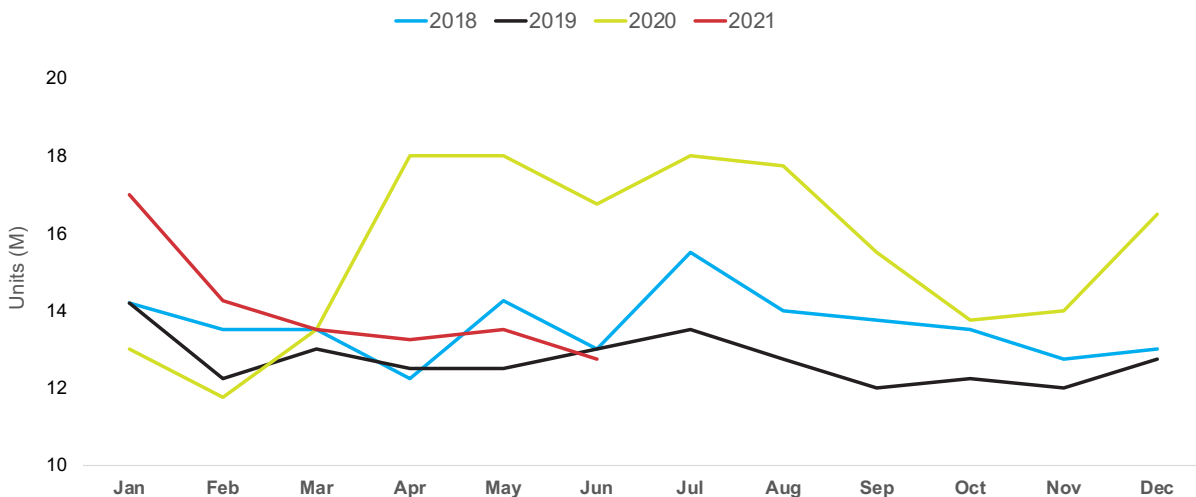
Meanwhile, publishers and book manufacturers must be aware of how certain book segments are becoming digitized. While e-readers led to increasing digitization of trade books that consumers could download to devices such as Kindle or Nook, this technological innovation did not lead to any sort of decimation of the printed product in the trade book segment. [Data from NPD BookScan](#) indicates that 2020 was a banner year for e-books, largely due to the closure of book retail outlets during the early days of the pandemic. In 2020, e-book unit sales from U.S.-based publishers grew 22% year over year, which NPD states was the first year of e-book sales growth since 2013. As of June 2021, however, unit sales declined 8% compared to 2020, but still remained 8% higher than 2019. This decline in e-book sales, coupled with the sharp demand for printed books that manufacturers are experiencing today, demonstrates that with pandemic-related store closures largely over, consumers are turning to printed trade books for their reading desires.



Audiobooks are another digitized book platform on the rise. [According to data from Pew Research Center](#), the percentage of U.S. adults who have listened to an audiobook within the preceding 12 months has been on a steady incline since 2016. In data released in January 2022, 23% stated they listened to an audiobook in 2021. While audiobook consumption is increasing, it is not cause for concern for book manufacturers, as audiobook consumers often seek out supplemental printed books from authors they discover in audiobook format.

## Figure 6: Monthly E-Book Sales, 2018-June 2021

Year-to-year e-book sales declined 8% through June 2021



Source: The NPD Group/PubTrack Digital, 2018 through month ending June 2021, U.S. e-book sales only.



According to [reporting from Publishers Weekly](#) that cites data from NPD BookScan, sales in the fiction categories led the book industry's record year in 2021. Young adult fiction saw unit sales increase by a massive 30.7%, followed not too far behind by adult fiction, which saw sales increase by 25.5%. Juvenile fiction also saw close to a double-digit percentage jump, increasing 9.6% in 2021. According to Fetherston, demand for printed fiction has been highly successful amidst the stress of the pandemic.

"The thing that's really buoyed my view of this is some of things that are doing the best," he said. "Juvenile fiction and adult fiction are going crazy, which we think is very positive trend data, because if you want to learn how to fly a kite or make Japanese sushi, we can go buy a book that teaches us how to do that. But then we're done because we've learned all that we want to do, and move on to the next thing we want to do. But the acquisition of a book, especially in a series, indicates that this is a commitment to reading beyond just one book."

Outside of specific genres, it is worth noting that backlist books have been the primary growth driver in recent years. [Publishers Weekly reports](#) that in 2020, 67% of all units purchased were backlist. As the pandemic eases, frontlist books are expected to make gains, as brick and mortar stores reopen and authors return to touring schedules to promote their work. The social media trend BookTok, which has skyrocketed in popularity on the TikTok platform, has also been a key driver of book sales as fans discuss and share their favorite new titles. In fact, [Bloomberg reports](#) that Barnes & Noble is on track for a better year in 2022 than 2021 and 2019, and attributes much of the expected success to BookTok.



**Figure 7: Unit Sales of Print Books, 2020-2021  
(in thousands)**

	2020	2021	Change
<b>Total</b>	<b>757,939</b>	<b>825,745</b>	<b>8.9%</b>
<b>Category</b>			
Adult Nonfiction	308,823	322,564	4.4%
Adult Fiction	138,840	174,190	25.5%
Juvenile Nonfiction	77,865	75,059	-6.2%
Juvenile Fiction	184,178	201,868	9.6%
Young Adult Fiction	23,691	30,974	30.7%
Young Adult Nonfiction	3,985	4,316	8.3%
<b>Format</b>			
Hardcover	226,369	249,788	10.3%
Trade Paperback	418,260	457,218	9.3%
Mass Market Paperback	39,420	38,215	-3.1%
Board Books	43,996	49,890	13.2%

Source: NPD BookScan via Publishers Weekly



One segment, however, that is seeing a sharp turn to digitization is the higher education segment.

While recent data from the [National Association of College Stores](#) indicates that 48% of students prefer some type of printed course material, it is clear that digitized textbooks are poised to remain a component of undergrad and graduate learning into the future. According to research conducted by [American University linguistics professor Naomi Baron](#), students do tend to prefer printed books, stating that ink on paper leads to better concentration and information retention. However, the affordability, convenience, and interactive components of e-books make them an attractive option for cash-strapped college students always on the go.

“Higher education has gone much more to the digital side,” McCree said. “Higher education, college — that’s a market that’s perfectly suited to the digital space.”



## CONCLUSIONS AND RECOMMENDATIONS

### Workforce Management and Development

Just about every industry is struggling to find labor in today's economic climate. This has made for an exceptionally challenging reality for the printing industry, which was already facing substantial difficulties in attracting workers prior to the pandemic. A high demand for printed books, compounded by a very low nationwide unemployment rate, has made the circumstances even more dire as book manufacturers seek to boost their staffs with whatever resources they can find. In the meantime, however, companies are working as hard as possible with the resources they have to meet the high demand, which has been beneficial for revenue, despite the difficulties.

To navigate through what has become one of the most substantial challenges the industry has had to face, book manufacturers should embrace a multifaceted approach. First, when conducting recruiting efforts, employers should ensure that they are highlighting the many ways book manufacturing has become a technically driven process that greatly differs from the heavily industrial manufacturing workplace of the past. This is a challenge that all print service providers face, but with the advent of digital printing and production technologies, and significant growth opportunities that embrace creativity and business acumen, book manufacturers that recruit in their communities, at high schools, and at colleges can help change the outdated perception of the industry.

Meanwhile, during this time of minimally available labor, book manufacturers would be well advised to explore investments in automation. Efficiency in production has become paramount to success in the printing industry, and with fewer available human resources, technology that can take on what were once manual jobs can help streamline and optimize workflow. Automation can span several elements of the book manufacturing process, from prepress to printing to finishing and distribution, and can be highly effective in taking on repetitive, manual tasks. Business owners should view automation technology as a way to free up their available human resources to handle the creative and relationship-driven work that machines cannot, rather than viewing it as a way to replace human work.

### Supply Chain Constraints

Much like the labor shortage crisis, material shortages are limiting book manufacturers' ability to meet the surging demand. Of particular urgency for book manufacturers is the drastic reduction in the availability of paper. While there are not a great many proactive solutions to acquire paper in an environment where it is quite simply unavailable, there are ways book manufacturers can weather the storm. Working with publishers and industry organizations for example, can be beneficial in finding solutions such as standardization and collective buying.

Most importantly, consistent communication with customers will help to set expectations and ensure that they are in the loop regarding expected delivery times. As with any business, difficulties in filling orders will result in some agitation among clients, but taking measures to reduce any surprises that publishers may encounter will be appreciated. It is hard to find any industry that is not being impacted by the current supply chain obstacles, so as long as book manufacturers are up front with the realities of current lead times, clients will be more understanding of delays.



“Information is the most important thing at this point,” the executive of the 150-employee company said. “We can’t make paper ourselves. We can’t force a square peg into a round hole. You can’t get more paper, so what can you do? You have to try to communicate to customers that ‘Here’s where we are. Here’s what we can do for you. How do you want to work with us with your titles you want to give us?’”

## **Growth on the Horizon**

Despite the numerous challenges the book industry finds itself combating, manufacturers can take solace in the fact that there is high demand for the product they produce. COVID-19, while devastating to many lives and industries, led to a resurgence of reading that is continuing to result in growing book sales.

While meeting the high demand for printed books may be difficult in 2022, the supply chain and labor challenges will subside at some point in the future. And when that happens, book manufacturers that have invested in automation, taken creative approaches to hiring, and embraced customer service will be ahead of the competition in an industry trending in a positive direction.

“We have a lot of challenges in our business, whether that’s the labor issue, whether that’s COVID, whether it’s demand outstripping supply, which means frustrated customers,” McCree said. “There are a lot of things that each and every day are challenging us ... but I think the state of our industry is really, really strong, and we have a long horizon that we can see ahead on right now of positive growth and opportunity.”





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# WHO WE ARE

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# WHO WE ARE

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The Book Manufacturers' Institute is a not-for-profit trade organization that supports book manufacturing leaders in their work to drive the promotion, efficiency, and growth of book markets for readers and educators in North America.

Since 1933, BMI has provided tremendous value to its member companies and others associated with the book manufacturing industry. BMI member companies range from full-service book manufacturers to those specializing in the digital print market, specialty binderies, component printers, packagers, equipment manufacturers, and suppliers of a variety of materials and services.

