



# Sectoral Profile

## Printing and Related Support Activities

NAICS 323

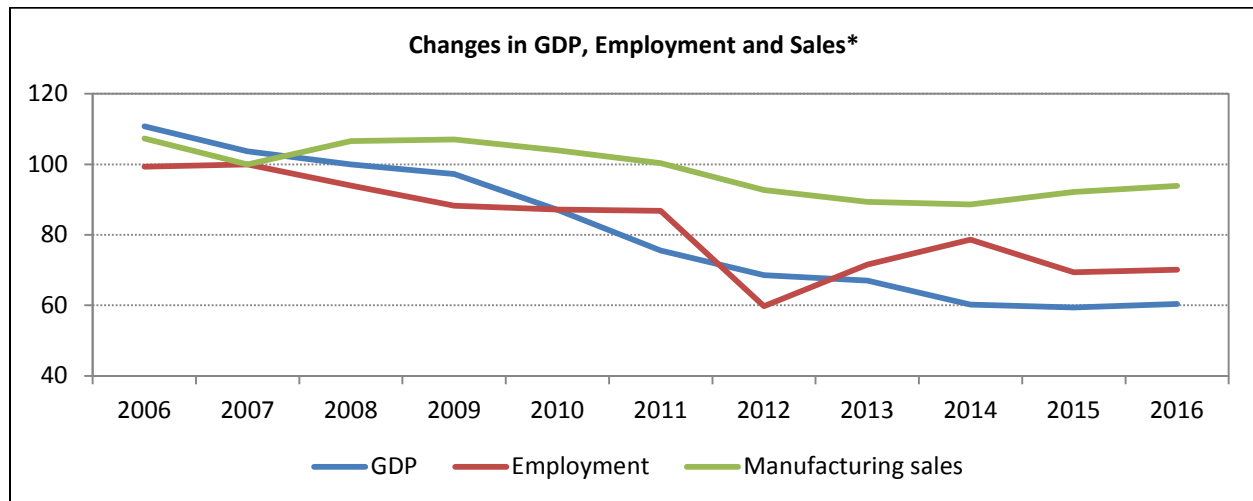
Quebec

2018-2020\*



- The issues facing the printing industry are the same as those affecting the paper manufacturing industry: decline of print and domination of electronics as a source of information and entertainment
- Consolidation on a provincial (and national) scale of paper printing activities within a few businesses
- In order to generate new revenues, businesses are migrating to electronic publishing, a service activity (distribution on the Internet), rather than a manufacturing activity (printing)

With the continuous decline in the demand for paper product printing, the workforce of the industry has been falling since the early 2000s. The competition from electronic products means that print media's importance is diminishing in the fields of information, entertainment and advertising. Like newspaper and magazine publishers, the printing industry has been undergoing a restructuring and a consolidation for the last few years. It now has less players and less employment.



\* Data are expressed as index where year 2007 = 100

Source: Statistics Canada, GDP – CANSIM 379-0030, Employment – LFS, Sales – CANSIM 304-0015

In order to generate other revenues, the industry is now capitalizing on other segments, such as package printing for the food industry (in partnership with paper manufacturers), and is adapting its advertising and directory printing activities to offer electronic distribution of these products instead. However, this latter segment is a service activity that is shifting away from printing, a manufacturing industry.

\* This document is the result of analyses performed using information available as at April 5, 2018.

Print remains the choice of older readers, but more and more among them are reading on the internet. In Canada in 2016, 54% of people aged 70 and over were still reading a newspaper; this proportion was 27% among young people aged 21 to 34. The transition to digital is growing quickly and leads to a significant decline of the demand for printed products.

Major dailies are investing considerable sums into acquiring digital content and platforms— *La Presse* newspaper, which serves the Greater Montréal region, is now published only in digital form since the beginning of 2018. The number of regional weeklies has been plummeting in Quebec. Advertising is also moving to a digital format and is adapting itself to the consumer, according to their interests and tastes. Finally, the number of e-book readers is continuously on the rise.

Faced with the decline of traditional production, manufacturers are seeking to increase their presence in other markets, to improve productivity, and even by shifting to printing on other types of products, such as plastic. However, as diversification is achieved through acquisition of foreign plants, the impact on the Quebec labour market is small. Until such time as the new production niches stabilize the workforce, the printing sector will continue to lose jobs.

### Sectoral Dynamics for Regions

Québec 2018-2020	In the Economic Regions	AAGR
Annual average growth: -2,3%  Loss of approx.: 1,185 positions  Yearly dynamics: 2018 : ↘ 2019 : ↘ 2020 : ↘	Mauricie	0.2%
	Capitale-Nationale	0.1%
	Abitibi-Témiscamingue	0.0%
	Saguenay-Lac-Saint-Jean	0.0%
	Outaouais	0.0%
	Côte-Nord / Nord-du-Québec	0.0%
	Gaspésie-Les-Îles	0.0%
	Lanaudière	-0.6%
	Chaudière-Appalaches	-0.7%
	Laurentides	-0.9%
	Estrie	-1.5%
	Montréal	-2.0%
	Bas-Saint-Laurent	-2.2%
	<b>QUÉBEC</b>	<b>-2.3%</b>
Montréal CMA	-2.8%	
Centre-du-Québec	-3.0%	

n/a: not applicable

Source: 2018–2020 Sectoral Outlook annual exercise

Labour Market Analysis Directorate, Service Canada – Quebec Region, April 5, 2018.

The following occupations in the printing industry are the most likely to be affected by growth (according to the occupation by industry matrix):

- 7381 Printing press operators
- 9473 Binding and finishing machine operators
- 9619 Other labourers in processing, manufacturing and utilities
- 5223 Graphic arts technicians

- 7303 Supervisors, printing and related occupations
- 6411 Sales and account representatives - wholesale trade (non-technical)
- 0911 Manufacturing managers
- 9471 Plateless printing equipment operators
- 5241 Graphic designers and illustrators
- 7452 Material handlers
- 1521 Shippers and receivers
- 9472 Camera, platemaking and other prepress occupations
- 0601 Corporate sales managers
- 0621 Retail and wholesale trade managers.

**SIZE AND DISTRIBUTION OF AND CHANGES IN EMPLOYMENT IN THE INDUSTRY IN QUEBEC**

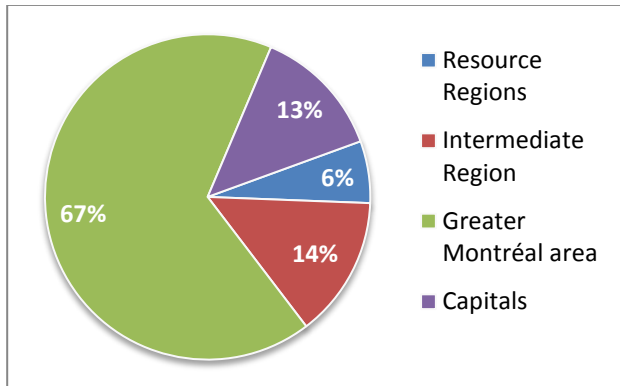
	Employment 2015–2017 Average			10-year Change in Employment	
	Employment In thousands	Provincial distribution	Regional employment share	In thousands	as a %
<b>All of Quebec</b>	<b>18.8</b>	<b>100.0%</b>	<b>0.5%</b>	<b>-11.1</b>	<b>-37.0%</b>
<b>Resource Regions</b>					
Abitibi-Témiscamingue	x	x	x	x	x
Bas-Saint-Laurent	x	x	x	x	x
Côte-Nord / Nord-du-Québec	x	x	x	x	x
Gaspésie-Îles-de-la-Madeleine	x	x	x	x	x
Saguenay-Lac-Saint-Jean	x	x	x	x	x
<b>Intermediate Regions</b>					
Centre-du-Québec	x	x	x	x	x
Chaudière-Appalaches	x	x	x	x	x
Estrie	x	x	x	x	x
Mauricie	x	x	x	x	x
<b>Greater Montréal area</b>					
Lanaudière	x	x	x	x	x
Laurentides	1.5	8.1%	0.5%	0.0	-2.1%
Laval	x	x	x	x	x
Montérégie	4.0	21.1%	0.5%	-3.3	-45.2%
Montréal	4.7	25.1%	0.5%	-2.4	-34.0%
<b>Capitals</b>					
Capitale-Nationale	x	x	x	x	x
Outaouais	x	x	x	x	x

x: confidential data, fewer than 1,500 people employed in this region

Source: Historical estimates based on Statistics Canada’s Labour Force Survey

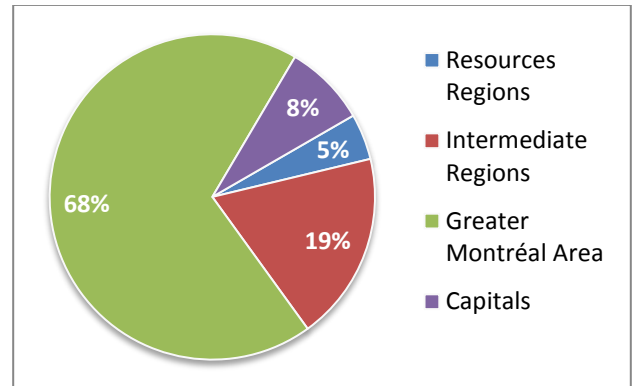
**SOME CHARACTERISTICS OF THE INDUSTRY IN QUÉBEC**

**Establishment distribution by Region**



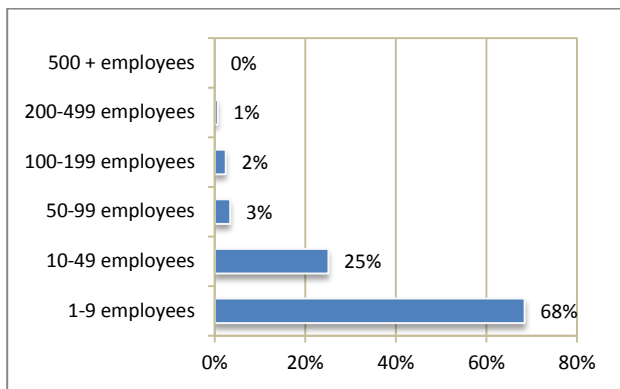
Source: Statistics Canada, Establishment Counts by Economic Region, industry, and Employee Size Ranges, December 2015

**Employment distribution by Region**



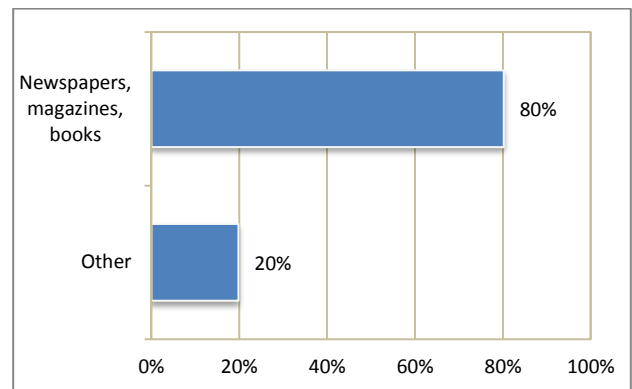
Source: Statistics Canada, Labour Force Survey; based on average employment in 2014-2016

**Size of establishment**



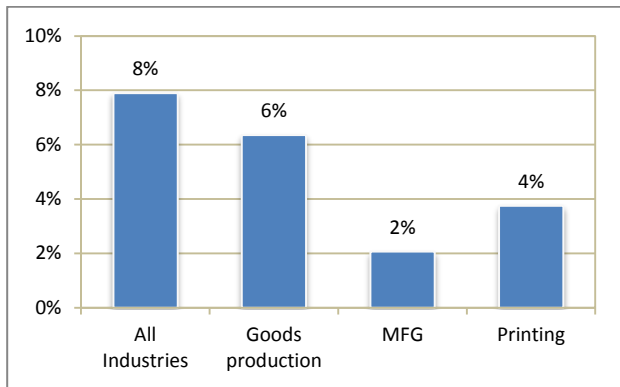
Source: Statistics Canada, Establishment Counts by Economic Region, industry, and Employee Size Ranges, December 2015

**Printing – Manufacturing sales by subsectors**



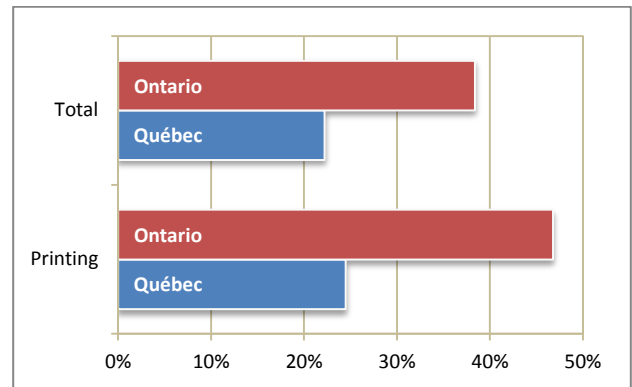
Source: Statistics Canada, CANSIM 304-0015 Sales of goods manufactured (shipments), 2014-2016 average

**Self-employed jobs compared to Total employment**



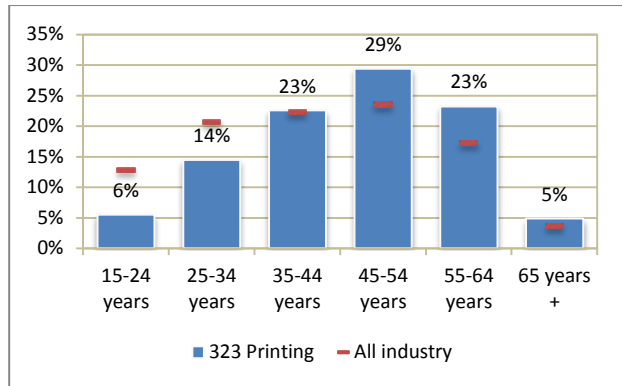
Source: Statistics Canada, CANSIM 383-0031 Labour statistics, based on average employment in 2014-2016

**Share of total employment and industry in Canada**



Source: Statistics Canada, Survey of Employment, Payrolls and Hours; based on average employment in 2014-2016

**Employed Labour Force Aged 15 Years and Over**



Source: Statistics Canada, 2016 Census, special tabulation for ESDC

**Employment distribution by skill type**

National Occupational Classification	
0 Management	10%
1 Business, finance and administration	13%
2 Natural and applied sciences and related	3%
3 Health	0%
4 Education, law and social, community and government services	0%
5 Art, culture, recreation and sport	11%
6 Sales and service	9%
7 Trades, transport and equipment operators	27%
8 Natural resources, agriculture and related production	0%
9 Manufacturing and utilities	25%

Source: Statistics Canada, 2016 Census, special tabulation for ESDC

**FOR MORE INFORMATION**

- Job Bank (Canada) – [Job Market Trends and News](#): Information on job, skills and local labour market trends is important for making career decisions. In addition, information on wages, labour supply, labour demand and other factors helps employers recruit, train and retain workers and make business and investment decisions.
- North American Industry Classification System (NAICS) Canada 2012: Printing and Related Support Activities [NAICS 323](#)

**Note:** In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.

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**For further information,** please contact the LMI team at:

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