

2025 Financial Benchmarking Findings

The Printing Industry: A Broad Overview

Insights from the February and March 2025 PIPi Study

PRINTING INDUSTRY PERFORMANCE & INSIGHTS

March
2025

Providing regional printing association members a printing
industry outlook view and actionable knowledge

The Printing Industry: A Broad Overview
From our “Printing Industry Performance & Insights” Survey

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Introduction

Below, we provide a broad overview of the printing industry drawn from our February/March 2025 “*Printing Industry Performance and Insights*” survey.

Here are the topics we discuss:

- Revenue Change from 2023 to 2024 (page 2)
- EBITDA Averages (page 7)
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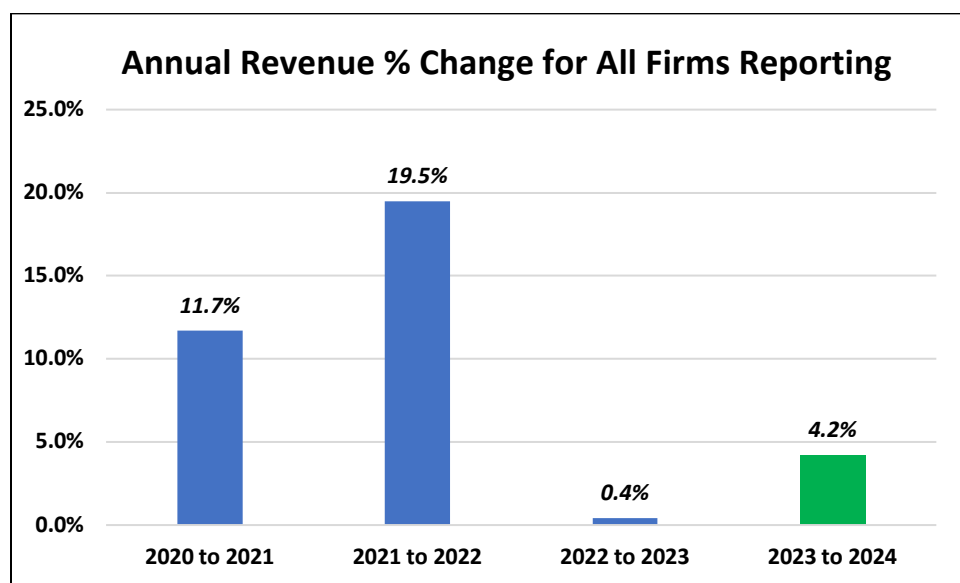
For these topics, we seek to provide you with helpful comparative and actionable knowledge.

We appreciate the 14 regional printing associations that sponsor and support our research. We list those associations at the end of the report.

Revenue Change from 2023 to 2024

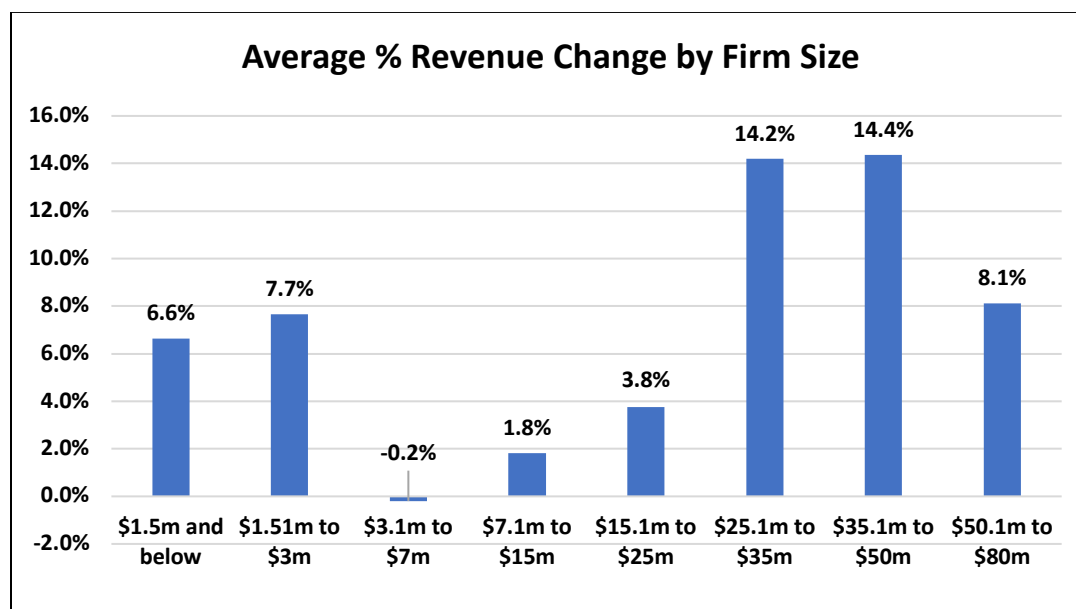
In our February 2025 survey, we asked, “What was your 2023 revenue?” and “What is your expected 2024 revenue?” The graph below shows the average percentage revenue change for all firms participating in our recent surveys. Previous survey results are shown in blue, and our recent survey exploring the 2023 to 2024 change is shown in green.

There were dramatic changes in the first three years shown, ranging from essentially no growth (0.4%) to 19.5% growth. Those three years were dynamic, with COVID-19 hindrances, government COVID-19 PPP payments (which some firms considered revenue), and dramatic paper supply issues. The average 2023 to 2024 percentage revenue growth among 108 participating printing firms was 4.2% (see the green bar in the graph below). Maybe 4.2% growth is more of the normal average for association-member printing firms... We’ll see.



We next looked at the average revenue change by firm size – see the graph below. There were anomalies in multiple revenue categories, so the numbers are all over the place. However, it’s interesting that we saw more growth in small and large firms than in medium-sized firms. If those growth numbers reflect our

industry, it's possible that smaller firms are more flexible and can add more products or services, while large firms can leverage their vast assets. In other words, medium-sized firms are potentially too big to be nimble and too small to scale. If you are leading a medium-sized printing firm, you might consider those possibilities. Also, the larger firms in our survey may have grown through acquisitions.



Our industry is very diversified, consisting of multiple strategic groups. A strategic group consists of companies with similar competitive approaches and market positions. For example, one printing industry strategic group may focus on providing general commercial printed products¹, and another printing industry strategic group may focus on labels. The table below provides strategic group descriptions found in this study, the number of firms reflected in that strategic group, and their average 2023-2024 revenue change. The strategic groups are listed from highest revenue growth to lowest.

It's interesting that "General commercial with high amount of wide-format" is at the top of our table. This may suggest that general commercial printing (e.g.,

¹ General commercial printing includes a large variety of products, such as posters, books, magazines, newsletters, direct mail, envelopes, brochures, catalogs, and much more.

brochures, business cards, annual reports) and wide-format (e.g., banners, signage, tradeshow displays) complement each other. Businesses often want a one-stop shop, providing solutions that increase convenience and branding consistency.

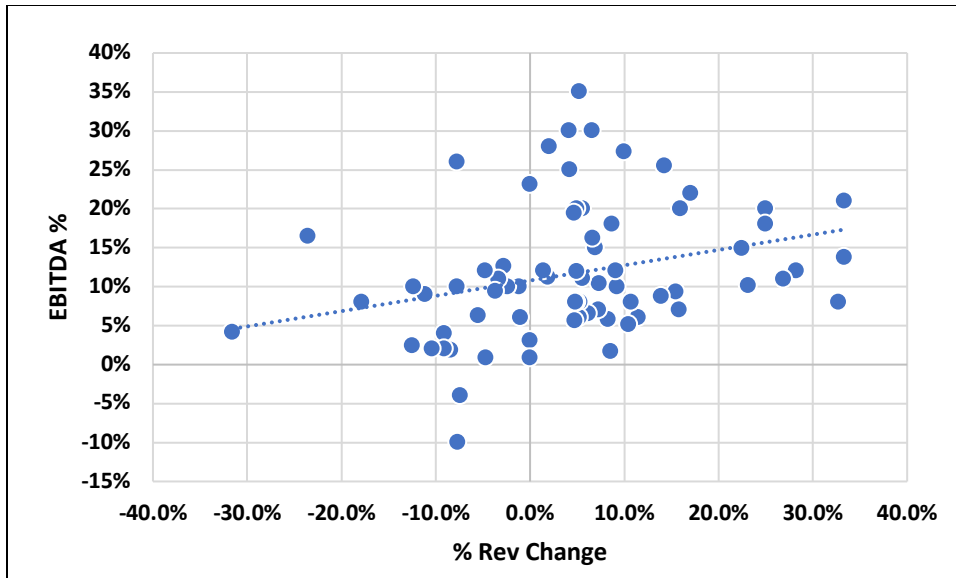
“General commercial and labels” was sixth in our table. We recently published an academic research paper about our industry’s strategic groups. In that research, we found that higher performing “label printing” firms focus on a low-cost strategy, seeking efficiencies and scale. As labels are often provided to manufacturers, prices are important, so efficiency and scale are important to label companies. It’s possible that firms not totally focused on labels (targeting both general commercial and label markets) can’t effectively manage their costs and provide competitive pricing like companies totally focused on labels, limiting their growth. However, as “General commercial and labels” had an average 15% EBITDA as a percentage of sales (shown in the next section), this strategic group is performing well. Maybe there are advantages to bundling general commercial printing and labels.

We were mostly surprised that “General commercial with a high amount of non-traditional products”² fell near the bottom of our average revenue growth table. In previous studies, we found that diversified printing companies providing non-traditional printing products performed well. Their EBITDA/Sales ratio of 14.7% (shown in the next section) reinforces our previous findings that firms in this strategic group perform well. One might wonder if a focus on wide-format with general commercial printing produces more growth opportunities than providing a plethora of non-traditional products/services with general commercial printing. In adding non-traditional products, printing firm leaders must consider each product’s effectiveness and the potential problems of becoming too diversified.

² Non-traditional products include a plethora of potential items, such as fulfillment, marketing consulting, photography, website design, apparel, and others.

Strategic Group	Number of Firms	Average % Growth
General commercial with high amount of wide-format	10	14.0%
General commercial	34	5.3%
Labels	11	4.6%
General commercial with high amount of direct mail	17	3.8%
General commercial with web printing	12	1.9%
General commercial and labels	8	1.4%
General commercial with a high amount of non-traditional products	8	0.4%

From our sample of association member printing firms, we see growth as a reasonable and achievable objective. The chart below graphs our survey participants' revenue growth percentage and EBITDA as a percentage of revenue. The graph's trend line indicates a positive relationship between revenue growth and EBITDA – more sales growth typically prompts higher EBITDA. Which makes sense! (*Dah!*). Therefore, we encourage printing firm leaders to determine a strategy and tactics for growth, set relevant goals, and communicate those plans and objectives with their team. There are growing companies in our industry – join that group.



The table below shows revenue growth by region,³ from highest to lowest. The Northeast and the West Regions are at the bottom of the table. Some economists propose that regions with stronger industrial bases, lower costs, and growing populations (like the Northcentral and the Southcentral) show higher revenue growth. In contrast, regions facing high costs or demographic decline (like the Northeast and the West) are seeing slower growth. The Northeast typically has slower GDP growth than other regions. However, the West's GDP growth is typically good, driven by technology and innovation. The 2024 fires in the West, along with our small sample from that region, may have affected our average. All that said, there are growing printing companies in every region. Printing company leaders, strategically plan to join the group of growing firms.

Region	Number of Firms	Average % Revenue Growth
Northcentral	17	4.8%
Southcentral	23	4.5%
Southeast	25	4.0%
Northeast	20	1.5%
West	5	-0.7%

³ The states in each region are shown at the end of our report.

EBITDA Averages

Seventy-nine firm leaders provided their EBITDA (Earnings Before Interest, Taxes, Depreciation, and Amortization) as a percentage of revenue. As states apply different tax rates and firms apply different financing approaches, EBITDA is a solid financial performance comparison tool. Those 79 firms averaged 12.2% EBITDA, which is comparable to our previous financial benchmarking studies' results. For instance, in 2024, our financial benchmarking study found an average EBITDA of about 11.5%, with higher-performing firms producing just above 20% EBITDA. There are solid-performing firms in our industry.

From the February/March 2025 survey (the basis of this report), we explored EBITDA percentages in different firm-size revenue categories. However, our findings were scattered and not meaningful.

The table below shows our EBITDA percentage of revenue averages for different strategic groups. Our sample sizes are relatively small. However, the numbers suggest that "General Commercial" printing firms' diversification into other products or services enhances company performance. Choosing a product or service to add is not always easy. Also, effectively adding additional products or services is a potential challenge. In a future study, we hope to explore the keys to effectively deciding what products or services to include and how to effectively add them.

Strategic Group	Number of Firms	EBITDA %
General commercial with high amount of wide format	7	19.7%
General commercial and labels	5	15.0%
General commercial with a high amount of non-traditional products	5	14.7%
Labels	10	14.6%
General commercial with high amount of direct mail	16	10.9%
General commercial	25	10.3%
General commercial with web printing	11	9.4%

Revenue and Profitability Outlook

To explore printing company leaders' outlook for 2025, we ask two survey questions: "What is your outlook for your firm's 2025 revenue?" and "What is your outlook for your firm's 2025 profitability?" Both questions had a one-to-five response scale: Very pessimistic (1), (2), Neutral (3), (4), or Very optimistic (5). One hundred and six respondents answered those questions. The average response for revenue outlook was 3.8, and the average for profitability outlook was 3.4. Both averages are above 3.0 (neutral), the "positive outlook" side of our scale. We looked at these two questions (profit and revenue outlook) from various strategic groups, firm sizes, and regions, and we did not see significant differences. We consistently saw averages above "Neutral (3)". Again, that's the positive side of our scale.

Our industry is considered challenged. In that context, it's interesting that we see growth, strong EBITDA, and somewhat positive outlook averages. Printing company leaders, if your or your team's outlook is not positive, it's time to step back and ask, "Why not?" and "What can we do?"

We also asked, “If you expect a significant change in 2025 revenue or profitability, please explain why below.” Here are some of the responses, which we divided into categories.

Mergers and Acquisitions:

- *We took over one other printer's business that will start delivering in 2025.*
- *I'm expecting min of 10% growth due to other print/mail businesses closing.*
- *We have acquired some new customers late last year that will have a significant impact on sales and profits. Most of these accounts are coming from customers that the printer they were using went out of business or merged with another printer.*
- *We are attempting to grow via acquisitions.*
- *Last year expenses were high due to an acquisition. This year we are focusing on decreasing expenses.*
- *Due to company mergers and acquisitions we have lost some large accounts. The attrition is going faster than we can make up in new business/sales efforts.*
- *May acquire a book of business.*

Cost Cutting, Debt Management, or Adjusting Prices

- *Increased pricing.*
- *Cost-cutting measures.*
- *We are paying off most debt in 2025.*
- *I think we can maintain 2024 levels of revenue, and I expect profitability to be as good due primarily to the fact we paid off a bank loan that had been burdensome for 27 years.*
- *We've gotten so lean we have to be more profitable.*
- *No significant changes - raised prices to combat inflation.*

Technology or Equipment Changes

- *We just moved into a new space - better throughput and added some faster equipment.*
- *The addition of a high-speed cut sheet inkjet press.*
- *Third year of our Indigo and our revenue continues to grow.*

- *Continued growth through utilization of technology and continued safe practices throughout entire industry.*
- *New: Manufacturing envelopes.*
- *Bringing wide format in-house. Was always a buyout before.*

Seeking to Grow

- *We hired an additional sales rep who is building significant momentum in the early part of this year and have a bigger staff to support more output. We anticipate much of the incremental gross margin dollars to fall to the bottom line which will enhance profitability substantially.*
- *We are aggressively growing.*
- *2025 is a year of change for the company with a new President overseeing the business. We will be investing in new products and services along with an increase in sales and marketing efforts.*
- *We expect growth from a couple of our larger customers on new marketing projects. We added an additional new sales representative that will also add volume to our 2025 sales growth.*
- *Increase sales efforts.*
- *We are aggressively pursuing new clients.*
- *We have obtained a large weekly project from one of our existing customers. We hired an additional sales rep for our staff and expect 2025 sales to grow 7-10%.*
- *We are bringing on three new production lines, made a significant investment in lead generation and marketing, and have several new product offerings.*
- *We keep growing and growth equals more profits.*

Concerns Over the Political Environment

- *Not a significant change, but business conditions seem better. Of course this could really go off the rails given the turmoil in governance.*
- *Tariffs causing increased costs of plates and paper.*
- *Reduction in grant funding for our non-profits.*
- *The first month of this year has been promising compared to the last quarter of 2024. The only dark cloud in the horizon is the issue of tariffs.*

- *It all depends on Washington and the distractions or lack of distractions coming out of the capital.*
- *A lot of uncertainty and volatility still in the market. I am hopeful for a turnaround in Q2.*
- *Our products are mainly imported from China. High tariffs will increase our costs and reduce the competitiveness of our products.*
- *Trump's policies will wreck my business. Significant amount of work comes from being a WBE (Women's Business Enterprise).*
- *Not significant, due to extenuating GeoPolitical and National issues, but anticipate an increase.*
- *The tariffs and new rules might affect the 2025 numbers.*
- *We think that changes made by the current political administration will increase costs and make customers more hesitant to buy.*

Other Comments Not Specifically Related to the Sections Above

- *This year has started out very slowly. There seems to be too much uncertainty. People are just not looking at printing things right now. We have about the worst start in the last 7 or 8 years, excluding covid.*
- *New product development in food processing industry, new client growth.*
- *Continued growth from existing customers.*
- *Lower demand will likely lower revenue. Competition getting tighter - which did not happen in 2022 and 2023 and for half of 2024. Now things are back to "normal"*
- *Growth in specialty print/packaging.*
- *Holiday schedule at the end of 2024 and weather interruptions in January and February have negatively impacted client availability and demand. Anticipate a pick-up when it warms up next week, but January and February actuals in 2025 were below 2024.*
- *We are facing many challenges with labor and competition. Our margins are razor thin, and if we have a bad month, we are trying to make up for it in the following months.*
- *2024 profitability was significantly better than in 2023. With new key personnel, I expect that trend to continue.*

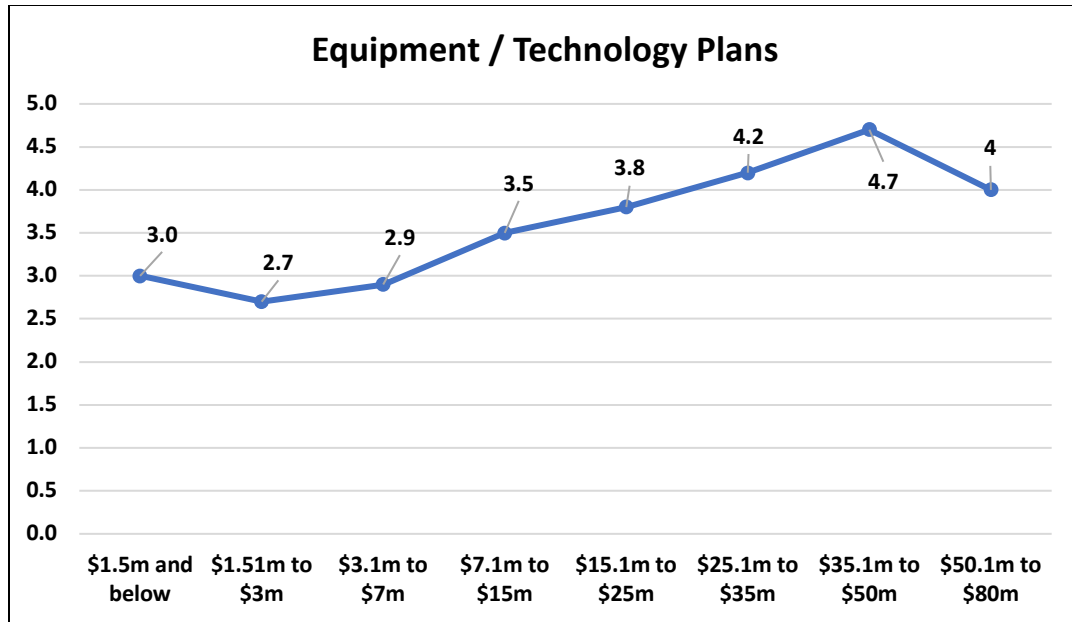
- *We had a big project last year that lowered our earnings and sales. There were issues with the project, so we took most of the costs in 2024 and will recognize the revenue in 2025.*
- *We are moving more into the wall graphics area as retail signage is on the decline due to store closures and bankruptcy.*
- *Automation integration, Wholesale Partnerships, Integration of Promo & Apparel Capabilities, Turnkey Online Fulfillment Solutions.*

Hopefully, these thoughts shared by printing company leaders will help you assess your internal in external environment and consider potential challenges and opportunities.

Staffing and Equipment Plans

We explored firm leaders' staffing intentions with this question: "What are your 2025 staffing plans?" They answered using a one-to-five scale: Major reduction in staff size (1), (2), Maintain the current staff size (3), (4), or Major increase in staff size (5). The overall average for 106 firms was 3.2, just above "maintain the current staff size." We evaluated the averages by firm size and saw no significant differences. The average for each firm size was between three and four, with larger firms a little higher. We saw the same consistent averages among strategic groups. From a big-picture view, it appears that most print companies are leaning a little toward some staff expansion. Another positive feeling.

We explored firm leaders' equipment/technology plans by asking, "Are you planning to make equipment/technology purchases in 2025?" Leaders responded on a one-to-five scale: Definitely not (1), (2), Unsure (3), (4), or Definitely yes (5). Our average response from 106 firms was 3.2, just above "unsure." Another positive view. However, our averages per firm size suggest larger firms are planning more equipment/technology purchases than smaller firms – see the graph below.



We saw some variations in equipment/technology plans among strategic groups – see the table below. Label firms had the highest average response, suggesting label companies plan to make more equipment/technology purchases than other strategic groups. Maybe that's because label printing equipment is evolving. Also, label printing firms may seek to add equipment and technology to increase efficiency and keep costs low.

“General commercial with a high amount of non-traditional products” was the strategic group with the lowest average equipment/technology plans. Maybe they are adding services that do not require new equipment. Or maybe, the equipment needed to produce non-traditional printing products does not often need upgrading.

Strategic Group	Number of Firms	Equipment Technology Plans
Labels	11	3.8
General commercial	35	3.4
General commercial with high amount of direct mail	18	3.3
General commercial with web printing	12	3.0
General commercial and labels	8	2.9
General commercial with high amount of wide format	10	2.6
General commercial with a high amount of non-traditional products	9	2.6

If you are considering adding equipment or technology, we strongly recommend that you budget and explore questions such as the following: Will the potential cost savings generate enough profit to justify that investment? How much additional revenue is needed to produce an acceptable return on that investment, and is that revenue growth achievable? Avoid making equipment or technology investment decisions purely based on intuition, which I did a couple of times when running a leading printing business. As I say to my students, “Don’t do like Dr. Ralph did!” 😊

Big takeaways from the stuff above

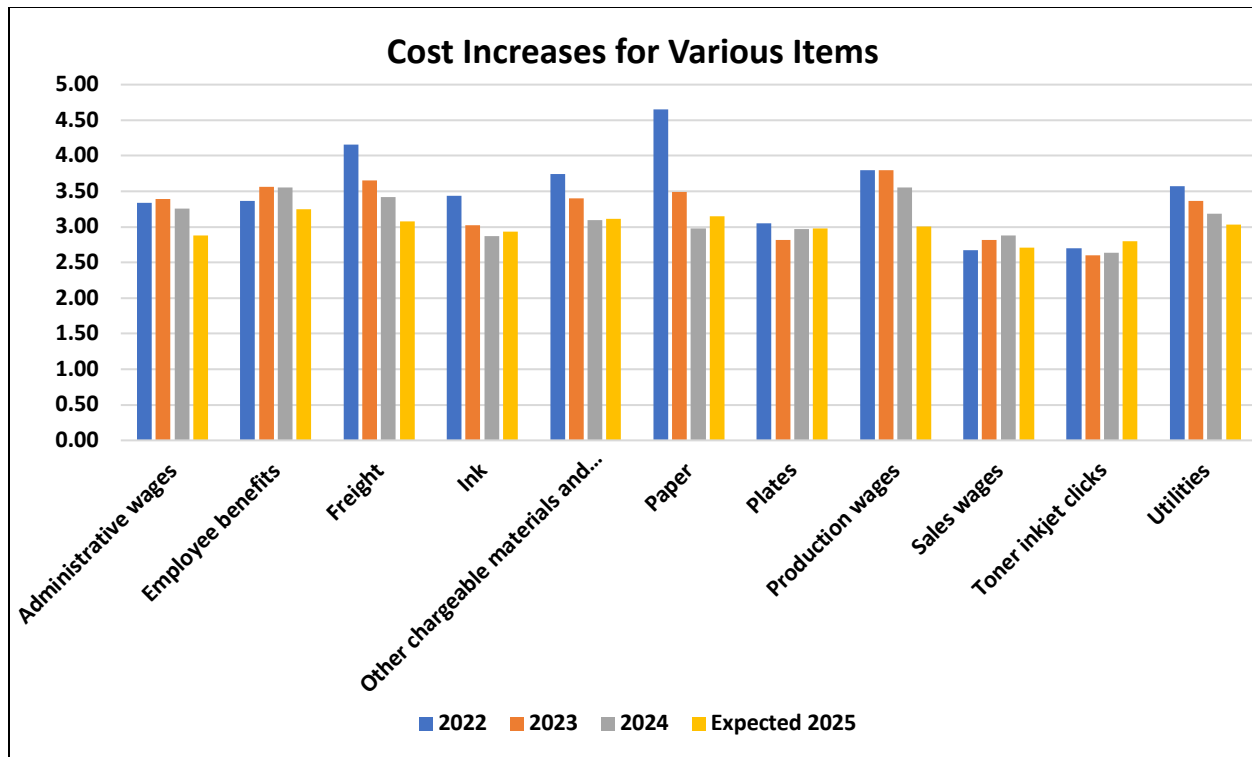
From our survey findings presented above, we see a relatively encouraging picture. There are growing and profitable printing firms, which is more the norm than an anomaly among association members. From expected revenue and profit, along with staffing and equipment/technology plans, we don’t see a negative outlook. If your firm is not growing or is not performing well, don’t blame it on

the industry. Discuss with your team multiple strategic and cultural adjustments, decide the best path, and move FORWARD.

Increasing Costs for Various Items

To explore cost increases for various items, we asked two questions: “How much did costs increase in each of the following categories during 2024?” and “How much do you expect costs to increase in each of the following categories during 2025?” The cost categories included the following: administrative wages, employee benefits, freight, ink, other chargeable materials and services, paper, plates, production wages, sales wages, toner inkjet clicks, and utilities. For each cost category, leaders responded on a one-to-five scale: Not at all (1), (2), Some, but manageable (3), (4), or A lot! (5). The graph below shows the trends of our eleven cost categories over the last three years and the 2025 expectations. The table below the graph shows the averages for each category.

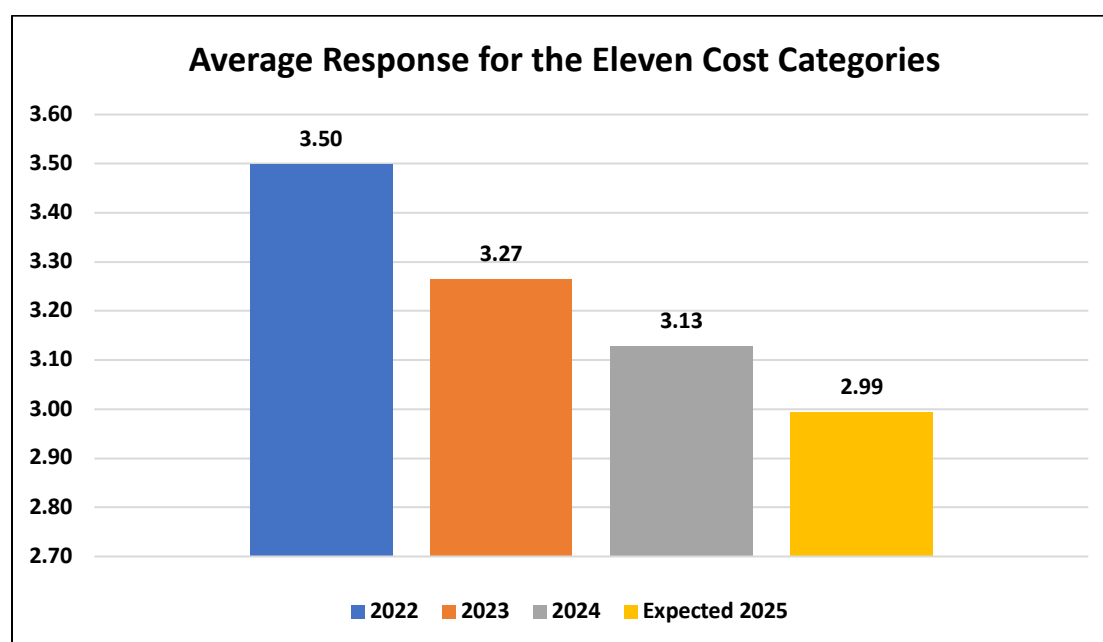
For most of the cost categories, looking at the past three years and expectations for 2025, we see trends of less cost increases, especially for paper. The two exceptions are plates (which we discuss later) and toner ink-jet clicks. However, all the averages are just above or below a three rating: cost increasing “Some, but manageable”.



Cost Category	2022	2023	2024	Expected 2025
Administrative wages	3.34	3.39	3.26	2.88
Employee benefits	3.37	3.56	3.55	3.25
Freight	4.16	3.65	3.42	3.08
Ink	3.44	3.02	2.87	2.93
Other chargeable materials and services	3.74	3.40	3.10	3.11
Paper	4.65	3.49	2.98	3.15
Plates	3.05	2.82	2.97	2.98
Production wages	3.80	3.80	3.55	3.01
Sales wages	2.67	2.82	2.88	2.71
Toner inkjet clicks	2.70	2.60	2.64	2.80
Utilities	3.57	3.37	3.19	3.03

This manageable cost environment is reinforced by the graph below, which shows the average response for the eleven cost categories over the past three years and the expectations for 2025. As shown, the cost increases over the past three years, and the 2025 expected cost increases are trending down. While inflation has raised prices generally, printing firms appear to be benefiting from industry-specific deflationary forces, including technological progress and post-pandemic supply chain recovery. Printing company leaders, if your firm has experienced, or is facing, a significantly increased cost for an item or service, you or your team might explore “why” and other options.

All that said, the current economic and political environment is very dynamic. Who knows where we’re headed?



We explored the average per region of our 2024 and expected 2025 cost question responses (2024 and 2025 averaged together). The Northeast and the Northcentral fell at the top of the list with the highest averages, slightly above the other regions. We attribute this to Northeast and Northcentral’s higher average wages and older workforce. Additionally, the Northeast faces higher tax rates. Interestingly, the West fell at the bottom. Yes, six is not a solid sample size for the West region. However, the big driver of the West’s low average was that five of the six firms responded “Not at all (1)” to expected sales cost increases. That may align with the lower sales growth shown for that region above.

Leaders, when facing increasing costs, you might ask a vendor, “Are these costs increasing in other regions?” And if not, “Why here?”

Region	Number of Firms	Average Cost Response
Northeast	20	3.33
Northcentral	17	3.30
Southcentral	24	3.02
Southeast	25	2.91
West	6	2.75

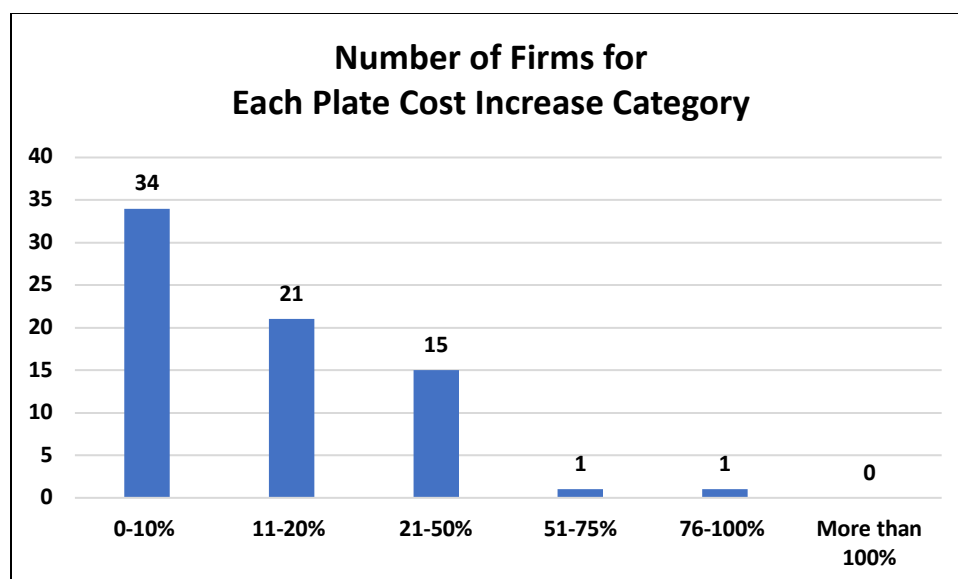
Printing Plates Availability and Cost

We are engaging more with association and printing company leaders, seeking topics they would like us to explore. A couple of leaders suggested that we look at printing plate availability and the increasing printing plate costs. Seventy-five of our respondents buy printing plates, and we asked them two questions.

We asked, “Is your firm experiencing challenges with the availability of printing plates?” Respondents answered on a one-to-five scale with these options: Not at all (1), (2), Some (3), (4), or Yes, purchasing printing plates is a serious problem (5). Our average response was 1.79. This average is significantly below “Some (3),” indicating printing plate availability is not a major issue as of now.

Next, we asked, “What percentage increase in the cost of printing plates has your firm experienced over the past year?” Respondents had the following six categorical response options: 0-10%, 11-20%, 21-50%, 51-75%, 76-100%, or More than 100%. The number of leaders who responded in each category is shown in the graph below.

If you are having problems with printing plate availability or if your printing plate prices increased by more than 20% in 2024, you might share these results with your vendor. As we mentioned above, who knows what changes the current dynamic economic and political environment will bring.



Recession Expectations

Another topic prompted by leaders was the expectations of a recession. We asked, “Do you foresee an economic downturn (recession) coming?” Respondents answered on a one-to-five scale with these options: No, a recession is definitely not coming (1), (2), Not sure (3), (4), or Yes, a recession is coming (5). The average from 104 responses was 3.05, right in the middle, very close to “Not sure.”

We looked at recession expectations from a regional view – see the table below. Our averages suggest that Southeastern and Southcentral printing company leaders see less chance of a recession than those in other regions. However, things are changing daily. Indeed, economists propose that uncertainty from the current tariff battles is causing businesses to hold off on big investments.

Region	Number of Firms	Average Recession Expectation
West	6	3.50
Northeast	19	3.32
Northcentral	17	3.29
Southcentral	22	2.95
Southeast	25	2.76

We also asked, “If so (expecting a recession), how is your firm preparing for a potential downturn?” Below are the responses we received, some of which are interesting and may prompt helpful thoughts.

- *We will watch closely and begin layoffs if required.*
- *Cutting staff back till it hurts, then building it back up as the economic moves the Whitehouse are making takes hold.*
- *We are prepared either way by being diversified in the revenue sources: Advertising, Mailing, and General Commercial printing. One goes up, other(s) come down, and visa-versa.*
- *Keeping debt low and by diversifying our offers to reduce sales decrease risk.*
- *Stay lean and efficient.*
- *Keeping a tight control on inventory and overtime.*
- *Increasing marketing, expanding our "recession-proof" client base, and buying labor-saving equipment – not "if we had this equipment, we can sell this kind of work".*
- *Modest concerns around inflation and general macroeconomic environment, but I think the new administration is largely exceptionally pro-business and specifically pro-small business. I expect almost all changes to be positive for our business – lower taxes and lower regulations help us.*
- *We have always run a lean operation, and we have some cash reserves. Our building is paid, which is plus in down years.*
- *Running very lean on staff. Renewing/extending contracts with top clients.*
- *Maintain a strong balance sheet, and focus on continual improvement of labor, total quality and creating an exceptional client experience.*
- *We have zero debt and run very lean.*
- *Look for suppliers outside of China to try to keep product prices competitive.*
- *Nothing we can do.*
- *We are strengthening our vendor partnerships for various reasons, including tariff mitigation, and expanding the products we can offer clients.*
- *We are attempting to consolidate with other small printers in our immediate market to eliminate market spoilers and to maintain a positive customer service reputation for small main street printers in our area.*

- *We've streamlined all we do and reduced all unnecessary expenses*
- *Being very conservative with spending. Holding off on making large equipment purchases.*
- *Our primary customers are typically unaffected by recession, so we can usually ride out the storm.*
- *We remain nimble. We are not currently overstaffed and, if need be, will reduce staff to fit revenue. We also partnered more with others to help in the "peaks" so I do not need to staff for the high production times.*
- *We will make the necessary staffing changes to make sure our SPE ratio is within our corporate goals.*
- *New Business development to ensure attrition doesn't affect our business and margin.*
- *Also actively pursuing acquisitions.*
- *We are very conservative with our expenditures.*
- *We're reinforcing supply chains, diversification, reliance on in-house work more, negotiating terms, etc.*
- *We have invested in an outside sales and marketing firm to help keep our sales funnel full. We have also started working with a CPA and our bank to start securing funds for the next 3 years.*
- *Staff cutback and inventory reduction are two go-to for us.*
- *We have a wide range of customers in various business sectors, which is easy to change direction pretty quickly and printing will still be needed.*
- *We are toggling between adding staff for sales efforts, or downsizing.*
- *We won't be replacing employees who leave or get fired.*
- *If a downturn occurs, we will make staffing changes. For the most part, we are debt-free, and rather than paying cash for equipment, we might finance to save our cash reserves.*
- *Working on more efficient systems and production equipment, and determining the best staff to maintain.*
- *AI, Automation & new product offerings.*
- *Building up cash, watching where the tariffs go, buying some supplies before pricing goes up.*
- *We are doubling down our sales efforts, and hoping that we do well in a recession, as we have done before.*

- *Cutting costs and stashing cash. Putting solid loan packages together so that we have the cash to manage through what comes next.*
- *We have raised prices to combat inflation - continued sales and marketing efforts to keep current clients and obtain new customers.*
- *We are going to scale back our employee base and reduce costs as much as possible.*
- *Diversification of portfolio between product mix, wholesale partnerships, and direct client integration with Online Web Solutions*
- *Raising prices, increase sales, save money.*

We hope you find the knowledge provided above helpful. If you have any suggestions or questions related to this report or the “*Printing Industry Performance & Insights*” studies, please email Ralph Williams at ralph.williams@mtsu.edu

Participating Regional Printing Associations

FGA – Florida Graphic Alliance
 GLGA – Great Lakes Graphics Association
 GMA – Graphic Media Alliance
 PGCA - Print & Graphic Communications Association
 PIA – Printing Industry Association
 PIAG – Printing & Imaging Association of Georgia
 PIAMA – Printing and Imaging Association MidAmerica
 PIAS – Printing Industry Association of the South
 PIASD – Printing Industry Association of San Diego
 PICA – Printing Industry of the Carolinas
 PIMW – Printing Industry MidWest
 PINE – Printing Industries of New England
 PMA – Print Media Assoc.
 VMA – Visual Media Alliance

States Included in Each Region

Northcentral

Illinois
Indiana
Michigan
Minnesota
Nebraska
Ohio
South Dakota
Wisconsin

Northeast

Connecticut
Delaware
Maryland
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Vermont

Southcentral

Arkansas
Kansas
Louisiana
Missouri
Oklahoma
Texas

Southeast

Alabama
Florida
Georgia
Kentucky
Mississippi
North Carolina

South Carolina

Tennessee

Virginia

West Virginia

West

Arizona

California

Oregon

Utah

Washington