I’ve been at GRAPH EXPO and heard some people say... “the show looks smaller this year!” to which I reply... it was a PRINT show last year and this year it’s GRAPH EXPO. First I get a ‘deer in the headlights’ stare in response, and then... “what’s the difference between PRINT and GRAPH EXPO?” After all, they’re both in the same city and the same facility and the show looks and feels the same. My answer is that PRINT is bigger, longer and international in scope, and from my perspective, the key is the international component.

For many years, an organization called EUMAPRINT maintained a schedule of major international shows, with these shows planned years in advance so they wouldn’t conflict with each other. Drupa, PRINT, IPEX and IGAS were the four major global shows on a rotating four year schedule so as not to overlap. Hence in the U.S., every fourth year PRINT is staged and the other three years are GRAPH EXPOS.

To ensure the international flavor of the PRINT show, GASC must attract more foreign exhibitors to the show than typically at a GRAPH EXPO. This is achieved by the addition of country pavilions and larger foreign exhibitors that normally don’t exhibit directly in GRAPH EXPO reserving their own booth at PRINT.

More important is attracting a global audience to the event, thus reinforcing the global nature of the show. To that end, NPES’ senior management team developed a marketing plan that pinpointed the major regions/countries as the focus of our year-long, pre-show international PRINT 09 promotion efforts. Our strategy was to utilize data from the then recently released PrimIR study, World Wide Market for Print, as the ‘content’ to rally printers, potential exhibitors, association leaders, the graphic arts press, tour organizers and U.S. Commercial Service office around the show. The study also provided a roadmap of the largest print markets in the world and the fastest growing regions and countries, which provided the focus for our promotional efforts. This process began in earnest in early 2008 as we planned for the NPES presence at drupa and the official rollout of PRINT 09 promotion.

**Tokyo, Japan: September 2007**

Even earlier than that, we gained our first opportunity to reach a major regional audience at IGAS 07 in Tokyo. There we hosted an hour-long press conference attended by over 40 ‘multipliers’ (members of the media and industry organizations) where we spent 45 minutes sharing the study findings and 15 minutes on details about the show. This format proved to be an ideal formula as the study data was unique, fresh and of interest to our attendees. It clearly illustrated the fact that the U.S. market is the largest in the world and why PRINT 09 would truly be the epicenter for the graphic communications industry in 2009. And, while other shows may be bigger—the U.S. is still the largest print market in the world by far and a major draw for foreign attendees.

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**Around the World Promoting PRINT 09**

NPES VP Global Programs Kip Smythe addresses Japanese media and industry leaders at a press conference at IGAS 07 in Tokyo’s Big Sight.
chairman’s perspective

Hank A. Brandtjen, III
NPES Chairman
President, Brandtjen & Kluge, Inc.

The Road Ahead: Small Steps a Journey Make

This past weekend we finally had rain, so a portion of our indoor time was spent looking through old photographs. Walking down memory lane can be a very pleasant thing to do. You get to relive enjoyable moments in your life and share stories with family. You also get a reminder of what is important to you. To paraphrase Winston Churchill, stories with family. You also get a reminder of what to relive enjoyable moments in your life and share those who forget the past are doomed not to do those things they love again in the future.

Among our family photos were some pictures of the trips we took to the mountains. It was while looking at pictures of a recent hiking trip that my daughter made an observation about the importance of a photograph. She said that while hiking, she was mainly focused on the ground in front of her so as not to trip and fall. But that it was in stopping that the beauty of the surrounding scenery could really be enjoyed.

Her rather profound insight made me think about my focus as president of my company. When times are tough and I find myself on a rugged path, my focus is on our day-to-day survival. Every turn, and every step it seems, brings a new challenge and it can become a struggle to just survive. I have to step carefully or, as my daughter says, I may trip and fall.

Of equal importance though is stopping to look around. Where has my company been, where are we now, and where are we headed? Do I know the core strengths that comprise the foundation of our company—and are we continuing to build upon those strengths? What looms in front of us, just around the corner—and are we prepared for it? Where will our next steps take us, and will this path be the right one?

As the current chairman of NPES, I am fortunate to have personal contact with many of my peers in our great industry. I know I’m not alone in finding the existing markets a struggle. Cash is tight, sales can be hard to come by, and difficult decisions—sometimes painful decisions—must be made. But I also know that by stopping, listening and looking ahead there are opportunities to be found.

On our immediate horizon is the all-important PRINT show. What was once far in the distance is now mere days away. Will attendance be what we hope for? In talking about the PRINT show with Tom Devito, President of GMS, he made me realize that it is not the volume of visitors that matters but the quality. He elaborated by saying that he knows there will be attendees interested in his products, and he was making sure today to take the correct steps to ensure that at the show he will meet their expectations. Tom is positive PRINT will be a success for him.

Managing a company is a journey. The next important ‘mountain’ we will climb is PRINT. Like Tom, our company is taking the necessary steps to ensure that attendees who are interested in our products get the reception they deserve. Will this be our ‘destination’? Of course not, since after the show we must complete the vitally important follow-up in order to meet our promises and our customers’ expectations.

Dusseldorf, Germany: May 2008

After IGAS, our PRINT 09 promotion world tour shifted to Germany and drupa where we hosted a luncheon for the press and major exhibitors. To drive home the meaning of our ‘myPRINT’ theme, which features personalized marketing to 11 key market segments, we created a variable data giveaway—beer bottles with VDP labels so that during the show every attendee who visited our booth received a beer bottle with their own name on the label. (A runaway hit by the way!)

We targeted the largest and the fastest growing markets.
We visited four continents, every BRIC country and the emerging markets in Eastern Europe and the Middle East.”

Sao Paulo, Brazil: September 2008

Brazil is both the 10th largest market and the 10th fastest growing print market and, at over $12 billion, a sizeable market too. Accordingly, NPES President Ralph Nappi visited AFEIGRAPH to deliver the PRINT 09 message to over 150 printers and association leaders during three meetings in Sao Paolo.

Toronto, Canada: October 2008

Next stop...our trading partner to the north, Canada. At the Print World show in Toronto, NPES International Trade Director, Mike Hurley, was there to deliver a PRINT 09 presentation at their annual “Printer of the Year” dinner attended by over 200 printers.

Paris, France: March 2009

The International Color Consortium (ICC) meetings in Paris, France provided the perfect opportunity to promote PRINT 09 at the “Digital Print Day” session before a captive audience of over 100 potential show attendees.

Prague, Czech Republic: March 2009

The relative close proximity of France to the Czech Republic afforded a timely opportunity for a mini-trade mission and a PRINT 09 promotion luncheon. With the assistance of the U.S. Commercial Service office in Prague and the leading publication for the printing industry in the Czech Republic, Svet Tisku, we hosted 30 top industry leaders.
Guadalajara, Jalisco, Mexico: April 2009

South of the border, Mexico is one of the fastest growing markets at 34% over the 2006—2011 timeframe and also the 11th largest print market in the world. Because it is imperative that PRINT 09 draw a significant audience from this market, GASC VP Chris Price and I co-presented a PRINT 09 preview at the Expografica show in Guadalajara, Mexico to over 50 leaders of the Mexican printing industry. Based on the positive response we received from this well attended event, we are optimistic that the outcome will be ‘mission accomplished.’

Dubai, United Arab Emirates: April 2009

In conjunction with the Gulf Print show, NPES President Ralph Nappi addressed an influential audience in this exciting, developing market where the World Wide Market for Print study predicted the gulf region will grow by over 50% by 2011, offering tremendous potential for NPES members and PRINT 09 exhibitors.

Warsaw, Poland: April 2009

One of the keys to delivering global attendance to the show is the assistance of the U.S. Commercial Service. PRINT 09 is recognized by its International Buyers Program, which elevates the show to a high priority for every Commercial Service office around the globe. And in Poland, two major events took place that provided outstanding visibility for the show. Every year, Commercial Service officers convene at an event called Trade Winds; GASC and NPES became sponsors of the event which gave us the opportunity to share our message and define what we needed from each and every Commercial Service office in Europe. We met with all 27 commercial service officers and gained their commitment to promote the show to all attendees of the 2005 event—plus all printing companies in their databases. Next, we proceeded to the Poligrafiatrade show in Poznan, Poland where PRINT 09 was prominently promoted in the Vidart magazine booth.

Beijing, China: May 2009

Our next target was the 3rd largest print market in the world with a forecasted growth rate of 60%. The China Print 09 show in Beijing was no disappointment with over 1.1 million net square feet of exhibits, over 160,000 attendees and 1,284 exhibitors according to the organizers. PRINT 09 was the focus of the NPES booth at the event, and NPES President Ralph Nappi presented to over 100 leaders of the Asian printing industries, driving home the message that although China is growing faster, the U.S. is still the largest, most diverse printing market in the world.

St. Petersburg and Moscow, Russia: May 2009

At two separate events, Ralph Nappi addressed over 150 ‘multipliers’ in the Russian market. Although the global downturn has affected some aspects of this market, digital presses and wide format are still of keen interest, and the huge digital presence of the PRINT 09 show was a major selling point at these events.

Tokyo, Japan: June 2009

The summer meeting of the International Color Consortium (ICC) in Tokyo provided another timely opportunity to promote PRINT 09, this time to the second largest print market in the world. At almost $85 billion, Japan is a key target for both attendees and exhibitors. Our luncheon presentation, which was attended by over 35 editors, potential exhibitors and large printers, afforded the opportunity to preview the many new show floor features and special attractions to be unveiled at PRINT 09. We received extensive publicity in newspapers, magazines and the trade publications as a result of this program which should help ensure significant attendance from the land of the rising sun.

Mexico City, Mexico—July 2009

The summer meeting of UILMAC afforded GASC VP Chris Price a second opportunity to excite the Mexican printing industry about the show. UILMAC is the organization representing the unionized lithographic printers in Mexico—they include the 100 largest Mexican printers as members. Chris hosted over 275 individuals at this event, which was the largest promotional event we produced and well worth the trip.

People around the world recognize the importance of the U.S. printing industry—and to them the PRINT 09 show is the global event for the U.S. market.”

In summary, NPES and GASC have left no stone unturned in our efforts to steer significant foreign attendance to the show. We targeted the largest and the fastest growing markets. We visited four continents, every BRIC country and the emerging markets in Eastern Europe and the Middle East. From our closest trading partners in Mexico and Canada to the farthest away in China and Japan, every significant market was visited. One thing is clear from our participation in this global effort, the PRINT brand is well known throughout the world…its significance is probably better understood there than here in the States. People around the world recognize the importance of the U.S. printing industry—and to them the PRINT 09 show is the global event for the U.S. market.”
What is Now and What Will Be?
NPES Members Now Benefit from Expert Economic Analysis and Forecasts

As the number of economic indicators showing that we may have reached the bottom of the recession (or are even beginning to climb out the other side) continues to grow, our attention should turn to what steps to take now to capitalize on the opportunities presented by the recovery. It is also instructive to review our lessons learned from this experience so that we are better prepared to deal with the next downturn.

To effectively accomplish both of these goals, you first need access to some crucial information: when the recovery will pick up steam, how long it will last, how strong the economy will ultimately get, when to expect the next downturn, and what impact the recovery will have on key print equipment and supplies segments. To help you explore those questions, NPES is pleased to offer members access to expert economic analysis and forecast reports by the Institute for Trend Research (ITR), the company led by Alan Beaulieu.

Alan has twice been a keynote speaker at NPES Annual Conferences, and both times his informative and insightful economic forecasts have been the highlight of the meetings. As Alan was one of the few experts to correctly predict the timing and severity of the downturn, NPES members immediately saw the value in the information he could provide and requested that NPES work with him to provide forecasts for our industry.

The quarterly Economic Outlook Reports provided by ITR offers analysis and forecasts for the overall U.S. economy and six key industry product segments: total equipment, total pressroom equipment, sheetfed offset presses, total bindery, total graphic arts supplies, and direct to metal printing plates. They also provide updates on key leading economic indicators that members can use to predict their own future activity.

These quarterly reports, with an annual value of nearly $20,000, will be provided at no cost to those NPES member companies that participate in the NPES Market Data Program. Those member companies that do not participate in the Market Data program will receive a limited report with the basic information on total equipment and supplies.

“This is a tremendous new member benefit,” said NPES President Ralph Nappi, “and I am excited that we are able to offer this valuable service to our Market Data program participants. The NPES Market Data program provides participants with unparalleled actual industry numbers that they can use to uncover industry trends and gauge their own performance. The ITR quarterly reports, which are based on our NPES numbers, take that information one step further by offering expert analysis of future trends. This is just one more key decision-making tool that NPES Market Data participants can use to evaluate what they need to do now to be successful in the future.”

If you do not currently participate in the NPES Market Data Program and would like to receive these valuable reports, contact either Curt Alt or Bekha Ratnam at phone: 703/264–7200 to sign up. There is no cost to participate and, in addition to the quarterly ITR reports, participants also receive detailed quarterly shipments for 80 different industry product segments.
Market Forces Shaping the Future Media Mix

The graphic communications industry can anticipate a dynamic and evolving media and marketing communications landscape over the next three years, according to a new PRIMIR study entitled “Media Mix and the Impact on Print.” By the end of 2007, total U.S. media and marketing communications spending levels exceeded $779 billion, with a five-year compound annual growth rate of 2%. Advertising media spending accounted for only 32% of this total, with a softening of spending levels in 2007 and overall declines in 2008 and 2009. In contrast, non-media spending channels continued to grow at a 3% compound annual growth rate, fueled by steady investments in promotional programs.

However, print’s role in this media and marketing communications mix has been in decline for the past six to seven years. Executives and experts interviewed for the PRIMIR study anticipate spending declines in newspapers, inserts, directories, and catalogs, but expect relatively steady spending for on-demand sales collateral, packaging, direct mail and custom publications. At the same time, they plan to steadily increase spending levels into an expanded array of online/internet-delivered communication as well as mobile vehicles.

According to the study, six notable marketplace forces will be the primary drivers behind media and marketing communications spending through 2012:

1. Increasing diversity and growth in the 65+ population segment represent more important influences on consumer discretionary spending and media consumption, including rapid adoption of online activities. As of 2007, 35% of America’s population was part of a minority, which is significantly higher than Canada’s 16%. Aging populations are also a factor, with 12% of North Americans over 65. That figure is expected to increase about one percent per year through 2030. This older group is Internet enabled, with 45% of those aged 75+ actively online and the percentage is steadily increasing (the proportion doubled in just three years).

2. Economic conditions that began eroding in late 2007 unfolded into a global recession by late 2008. Recessionary conditions are expected to continue throughout 2009 and potentially linger into the first portion of 2010. Economic pressures on marketing executives are driving efforts to capture media and marketing communications efficiencies in every channel, with greater analytical efforts to determine effectiveness and return on investment.

3. Rapid and far-reaching expansion of digital technologies by media and consuming audiences are creating Internet-dependent lifestyles that are reshaping content consumption practices and creating new content delivery opportunities. Examples include the digital conversion of television broadcasts, the expanded coverage of digital outdoor signs, increasing household penetration of digital video recorders, steady growth in household broadband access and online activities ranging from viewing videos to handling personal finances. Internet-dependency will grow as continuous expansion of Wi-Fi connectivity makes Internet access more ubiquitous. Concurrently, traditional media, especially printed media, are aggressively trying to build online audiences and ad revenues to offset continuous declines in their off-line audiences.

4. Notable within the context of digital media expansion is the mushrooming adoption rates for Internet-enabled mobile devices in particular. This trend is expected to gain momentum, especially as recession pressures ease, driving a new wave of convergence across electronic devices that generate new behaviors for overall media consumption. Devices in the future will likely represent a hybrid combination of features from laptops, netbooks, mp3 players, GPS navigators, video recorders and ‘smart’ phones.

5. A critical shift toward consumer control over media consumption and message delivery accompanies these digital innovations. As Internet-enabled devices converge in the coming years, a sizable and ever-increasing proportion of consumers will exert much greater control over when, where, what and how media is consumed.

6. The ultimate by-product of all these market forces is the continual fragmentation of audiences. It will be increasingly difficult to cost-effectively transmit marketing communications that reach a critical mass of target consumers. Not only will marketers and media outlets redefine their thinking about integrated communications programs, but they will also evaluate the individual components of 360-degree communications plans (the practice of using multiple media channels to surround target audiences with advertising message exposure opportunities) to ensure effectiveness and the accountable contribution of each.

There remain opportunities in the printing industry, but aggressive efforts to build market share to offset overall business declines from key customer segments will be necessary. Global opportunities exist in selected countries where traditional print media have yet to experience severe contractions, but these too may begin to erode on a longer term horizon as digital media and production processes gain a stronger foothold. Economic expansion will help rebuild demand for print industry products and services but only in the more stable print media categories.

Firms in the printing industry supply chain will need to innovate and explore opportunities to develop new sources of revenue outside their existing core businesses. In addition, the development of new ancillary products and services will not only expand the customer base but also strengthen existing customer relationships.

NPES members will receive an Executive Synopsis of the study in early September and, to request a free copy of the complete study, may contact Aaron Allenza at NPES headquarters at e-mail: aallenza@npes.org or phone: 703-264-7200.

**Printed Media Channel**

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<th>Channel</th>
<th>Spending Outlook 2009-2010</th>
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<td>Internet/Online Channels (All)</td>
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Source: PRIMIR study “Media Mix and the Impact on Print”

¹ Includes stand-alone postal mailings by a single company and catalog mailings, excludes routine customer communication and transactional communications.
Are you sure you’re doing all you can to gain and maintain your competitive advantage? Of course, you are spending a great deal of effort on increasing efficiency, reducing costs, and looking for that one little ‘thing’ that differentiates you from your competitors and lures customers and new prospects your way. But are you ‘on the leading edge’ or ‘behind the curve’? The NPES Standards Program can help.

The Economic Benefits of Standardization

The German Institute for Standardization (DIN) commissioned a research study to determine the value of standardization to corporations. The study was developed from questionnaires sent to over 4,000 companies in 10 industry sectors, selected at random, in Germany, Austria and Switzerland. The final report on that study, entitled “The Economic Benefits of Standardization,” was published in August 2000, and the findings continue to ring true…maybe even more so, in today’s competitive economic environment.

One part of the report focused on both the benefits of standards for business and on the benefits for the economy as a whole. In comparing both company-developed standards, and industry-wide standards, the report states that “…company standards have the greatest positive effect on businesses, for they help improve processes. When it comes to the relationship with suppliers and customers, however, industry-wide standards are the main instruments used to lower transaction costs and assert market power over suppliers and customers. In fact, industry-wide standards play a vital role in our increasingly globalized world.”

The report further notes that “…it is significant that standards make a greater contribution to economic growth than patents or licenses, that export-oriented sectors of industry make use of standards as a strategy in opening up new markets, and that standards help technological change.”

Strategic Significance of Standardization

“Companies are generally unaware of the strategic significance of standardization.”

Although the persons involved in the standards development process are aware of the significance of the standards to their company’s success, often this awareness does not extend to the corporate decision makers. In addition, the decision to participate in the standardization process is often made only on the basis of how time-consuming and costly this will be. The economic payback of participation in standards development is not always obvious, but the survey showed that companies actively involved in the standards process are more likely to see both short- and long-term cost benefits than those that do not participate.

Potential Competitive Advantage through Standards

“Having influence in the content of a standard is an important factor in gaining competitive advantage.”

It is often said that you can be part of the solution, or live with the solution developed by others. Being part of the standards development process allows the company to gain ‘insider knowledge’ and to exert greater influence on the substance of the standards.

Cost Reduction through Standardization

“Standardization can lead to lower transaction costs in the economy as a whole, as well as to savings for individual business.”

The interviews with representatives of major firms as well as small- and medium-sized companies revealed that the costs of developing standards are not easily quantified. However, the businesses interviewed rated the positive effect on transaction costs as positive, noting that transaction costs drop considerably as a result of standards since they make information easily accessible to all interested parties.

Effects of Standards on the Supplier-Client Relationship

“Standards have a positive effect on the buying power of companies.”

Standards can encourage competition within the marketplace, and can be used by businesses to exert market pressure on companies further down the value-added chain. Businesses are, therefore, able to use standard to broaden their potential markets. Companies also have increased confidence in the quality and reliability of suppliers who use standards.

Standards and the Formation of Strategic Alliances

“…it is clear that cooperation between companies in matters of standardization is advantageous, for the resulting synergy can help reduce costs and increase profits.”

In the survey, respondents rated the effect of standardization on cooperation with competitors as positive, indicating that standardization encourages cooperation between businesses that are at the same stage in the value chain.

Standards and Research Development

“Businesses not only reduce the economic risk of their R&D activities by participating in standardization, but can also lower their own R&D costs.”

The economic risk of research and development is lowered when a company can influence the content of standards to its advantage. In addition, the expense of R&D can be reduced when participants in standards work make their results generally available, eliminating duplication of research efforts.

Product Safety and Liability

“Lower accident rates are partly due to standards. Participation in the standardization process increases awareness of product safety.”

The development and implementation of safety standards contributes to the reduction of accident rates, and raises awareness of safety features and practices. Representatives of consumer organizations see their involvement in the standardization process as having increased the industry’s awareness of the importance of product safety.

“Because standards reflect the current state of technology, they can help businesses reduce their liability risk.”

NPES makes it easier for you to become part of the standards development process. For more information about the NPES Standards Program, refer to the brochure enclosed with this edition of NPES News or contact Debbie Orf at e-mail: dorf@npes.org or phone: 703/264-7200.
Looking for Market and Trends Information for the Printing Industry?

Your competitors use these resources to their advantage—and so should you! Get the Picture?

SNAPSHOT: NPES MARKET DATA PROGRAM

Benchmarks equipment and supplies shipments.

What: The NPES Market Data program tracks current shipments information for 80 distinct equipment and supply product categories, allowing participating member companies to monitor market activity and the size of the current marketplace.

A 20% discount on equipment purchase and financing data services from Equipment Data Services (EDA)

Who: All NPES full Members are eligible to participate in the program.

How: Participating companies provide completely confidential monthly shipments information to an independent third-party vendor under contract to NPES. Strict disclosure and confidentiality guidelines are in place to ensure that individual corporate information is never divulged—only aggregate industry information is reported back to the participants. The information tracked and reported by the program is driven by the needs of the participating companies, and the product categories included in the program are continually being evaluated to ensure that the information is timely and useful.

Eligibility: All NPES full members are eligible to participate in the program.

Cost: FREE

Benefits: No other source provides such complete, comprehensive industry shipments information and expert analysis and forecasts for free. This information is crucial for uncovering market trends and gauging your own corporate performance.

NAICS 3335, Billions of $

All NPES members receive basic summary market data information through:

- NPES News summary articles
- Quarterly Institute for Trend Research expert forecasts for total equipment and total supplies
- Quarterly Marketing Information updates via DeWolf forecasts for total equipment and total supplies
- Monthly DeWolf Economic Forecast Letters

NPES members that participate in the free NPES Market Data program by submitting monthly data receive:

- All of the basic market data information listed above, plus
- Quarterly detailed industry shipments reports with actual shipments data (in dollars and units) for 80 distinct product categories
- Complete detailed quarterly Economic Outlook Reports from the Institute for Trend Research with expert analysis and forecasts for the US economy and six key industry market segments

SNAPSHOT: PRIMIR

Comprehensive research reports on emerging industry trends.

What: PRIMIR develops, conducts and publishes six to eight major market research studies each year. These studies provide a thorough evaluation and understanding of the topic area and include relevant data, qualitative analysis and forecasts for several years into the future, encompassing all sectors of the graphic communications industry and focused on:

- Emerging Technologies
- Print Processes
- Equipment
- Supplies and other Consumables
- End-use Print Markets

Who: PRIMIR membership is open to any firm engaged in the manufacture or distribution of equipment, software, materials or supplies to the graphic communications or converting industry, or any firm or corporation engaged in printing by any and all processes.

How: PRIMIR member representatives are actively involved in the organization via participation in task force activity, where they work in concert with outside industry experts/consultants to direct and conduct research for a specific topic area. Topics are recommended via surveys of PRIMIR and NPES members. Completed published reports are provided to PRIMIR members; additionally the findings are presented at regular PRIMIR meetings. Note: several studies are provided to NPES members each year with an Executive Synopsis of each report provided to NPES Member Delegates who may, at no cost, request a copy of the full research report.

Eligibility: Any firm eligible for corporate membership in NPES and any printer firm, trade shop, dealer and paper company or other chemical suppliers may join PRIMIR.

Cost: Annual PRIMIR dues range from $416 to $8,100, based on global sales volume; NPES members receive a 50% discount.

Benefits: Each year, PRIMIR publishes market research studies valued at nearly $600,000 that PRIMIR members receive at no cost. (NPES members receive only studies earmarked as an NPES deliverable for that year.) No other industry organization provides this level of return on investment for information on emerging technologies and future trends, which will ultimately impact the graphic communications industry—and is crucial for identifying trends and new opportunities to position your company for a profitable future.
HURLEY’S TRADE-WISE
DO TELL INTEL

Global Challenges
Overcoming the
Great Recession

From a global perspective, it is clear that the current crisis—coming to be known as the Great Recession—is far from over. Already, however, it has provided many important lessons and motivated important changes in attitudes, organizations and actions.

In particular, there is little doubt about the striking degree of inter-dependence that lies at the heart of the global economy. It has become clear to all that overcoming the crisis requires a more collaborative, multilateral approach to economic and financial issues in the future if global growth potential is to be realized fully and if stability is to be reestablished and sustained.

The unprecedented anti-crisis action that has been driven by the G20 Leaders’ Summit process is beginning to produce positive effects. For the near-term, the International Monetary Fund (IMF), for one, has been emphasizing the following three essential messages:

First, the restoration of financial sector functionality in the advanced economies is a necessary condition for renewed growth. The principal goals are the restructuring of impaired financial institutions where needed, and the rapid thawing of frozen markets. Even taking into account the strenuous efforts that have been implemented in many affected markets, additional efforts will be needed if success is to be achieved, even though the decisions that will be required will be neither easy nor politically popular.

Second, sustained fiscal effort remains necessary. On a positive note, the discretionary fiscal stimulus being applied in 2009 is unprecedented in both scale and scope, totaling about 2 percent of GDP for the advanced G-20 economies, approximately the same degree of fiscal stimulus that is being applied in Asia. This is exactly the degree of action that the IMF had suggested would be appropriate. Moreover, the impact of this effort is being multiplied by its simultaneity. IMF analysis indicates that fully one-third of the expansionary impact of the fiscal stimulus reflects spillover effects from stimulus-driven trading partner demand.

The third message is that concrete action is needed immediately to insure that emerging market and developing economies are cushioned from the double blow being delivered by the simultaneous drop in international capital flows and in external demand.

The current crisis has culminated in the risks and hardships of the Great Recession. Serious challenges remain just ahead, and they must be overcome.

To address the challenges ahead requires a spirit of innovation backed by action. Last month the World Bank Group joined forces with the European Bank for Reconstruction and Development (EBRD) and the European Investment Bank (EIB) to support the banking sectors in Central and Eastern Europe, with a funding package of up to €24.5 billion. ●

Sources: World Bank, International Monetary Fund, NPES Global Programs