Preliminary 3rd Quarter Market Data Shows Mixed Results

With consumer spending beginning to show the first signs of life in more than a year, the unemployment rate unexpectedly dropping, and the ISM manufacturing index in positive territory, it really does appear as though the U.S. economy is inching towards recovery. While that is certainly great news, those of us in the printing industry know that our industry still has a long way to go. According to Dr. Joe Webb and What They Think, October printing shipments were down 13% compared to the year before, and there’s a chance that printing shipments for all of 2009 will be off by as much as $10 billion.

That difficult reality is reflected in the preliminary NPES 3Q09 market data numbers. The NPES market data program tracks monthly shipments of products across 80 different categories of equipment and supplies. For the good news, total graphic arts supplies increased slightly over the previous quarter, continuing the upward trend first noted in the second quarter. For the bad news, total equipment shipments continued to decline.

NPES’ equipment shipment data includes prepress, lithographic press, and bindery and finishing equipment sold in the U.S. If we extrapolate the total equipment shipments for the first three quarters of the year to the full 12 months, as illustrated in Figure 1, 2009 will come in at $633.6 million. Thinking positively, the fourth quarter of the year has historically been the best quarter for equipment shipments, so there is the hope that equipment fortunes may turn as the broader economy recovers. It is important to note that these equipment figures do not include digital equipment, which many industry observers believe would account for much of the reported decline in shipments.

For total graphic arts supplies (which includes film, plates,
The Global Recession’s Impact on Print

The global recession did a number on our industry, the effects of which we are only just beginning to see. Research conducted in 2006 for NPES’ sister organization, PRIMIR (Print Industries Market Information and Research organization), had originally forecast an 18% increase for the global graphic communications industry, from $610 billion in 2006 to $721 billion in 2011. Post-recession, PRIMIR’s updated data shows that the world print market is expected to grow by only half as much, 8%, between 2006 and 2011. According to the research, the global graphic communications industry will reach $725 billion by 2014—a full three years later than our forecasts had originally predicted.

Consider the BRICs

If you haven’t already, consider the BRIC nations of Brazil, Russia, India and China for business opportunities. Though their rates of growth will be slower than in the early part of the decade, these countries still stand out in the post-recession world as being among the fastest, and biggest, growing graphic communications industries in the next few years.

China, in particular, is expected to grow at an astronomical rate. Indeed, all the general signs of development are there: an increasing literacy rate (almost 91% in 2003, from 78% in 1990), a growing population (1.4 billion by 2014) and a gross domestic product that is predicted to nearly double between 2008 and 2014 (from $4.4 trillion in 2008 to almost $8.5 trillion by 2014). So it’s no surprise that China’s printing industry is forecast to increase from $57 billion in 2008 to $100 billion by 2014. If forecasts hold true, China will even overtake Japan in the next five years to become the second largest print market in the world.

India and Brazil will also boast sizeable print markets in the coming years. In 2009, the graphic communications industry in India was at $16 billion. It is expected to expand to $24 billion by 2014, a growth of nearly 49%. Brazil’s print market is predicted to expand by 38% from 2009 to 2014, to nearly $21 billion.

Russia’s printing industry, though not as strong as the other BRICs, remains a viable player as well, at about $8 billion in 2009. Russia’s print market is forecast to grow to almost $14 billion by 2014.

And, two other print markets show particular promise: Mexico and Indonesia. By 2014, Mexico’s print market is expected to hit $18 billion and be the eleventh largest in the world. Indonesia’s graphic communications industry, meanwhile, is predicted to grow by almost 45% between 2008 and 2014, to a little more than $8 billion.

The promise of inkjet, digital

Drilling down through the data, a few trends begin to emerge. Inkjet is big. So is digital (also called “electrophotographic”). These print processes are so big, in fact, that they are expected to enjoy a near doubling of their market share between 2008 and 2014. While it’s true that their market share is still minimal compared to the more traditional print processes, inkjet and electrophotographic are showing their great potential for the future. (Sheetfed printing is the only other print process expected to increase its market share between 2008 and 2014.)

The promise of inkjet and electrophotographic becomes even more apparent when considering the global machinery market. In 2008, the global machinery market tells a fairly standard tale: Sheetfed presses claim a $5.6 billion market, greater than any other
equipment category. By 2014, however, the sheetfed press market will have contracted by over 8%, to $5.1 billion—while inkjet sales will have shot up from $1.9 billion in 2008 to $4.8 billion in 2014, almost the same as sheetfed. (See pie chart, "Global Machinery Market, 2008 – 2014.") The forecasted growth for inkjet, by the way, is 160%.

Other segments of the global machinery market expected to experience significant growth is, naturally, electrophotographic and also flexo and postpress. At $1.4 billion in 2008, the electrophotography market is predicted to increase by 49% between 2008 and 2014 to just more than $4.7 billion. Based on the significant growth of package printing over the study period, flexo equipment is forecast to grow a steady 12% to over $2.7 billion by 2014.

Also predicted to experience marked growth (23%) in coming years is the outdoor point-of-purchase (PoP) and signage sector. (The growth of this sector, in fact, may be a contributing factor in the rise of inkjet technologies between 2008 and 2014.) At about $9 billion in 2014, it’s true that this category is well behind the traditional print categories of magazines ($69.0 billion in 2014), newspapers ($45.0 billion), books ($34.9 billion), catalogs ($33.4 billion), and brochures and pamphlets ($33.1 billion). But it’s also true that all of these “traditional” categories will undergo a decline between 2008 and 2014.

Given all these trends, it’s no surprise that package printers are expected to increase their share of the market between 2008 and 2014 by nearly 20%. Revenues from package printers will account for about $227.8 billion of the total $725 billion global graphic communications market.

Companies specializing in postpress will also fare well in the 2008 – 2014 time period. This category is forecast to grow by 12%, to $16.8 billion in 2014. Because of the growing savviness of the typical consumer and the multiple end-uses often required for products, more print clients are requiring special finishing. Those who can deliver on that, then, will profit.

The post-recessionary environment

It’s clear going forward that the way we did business even a few years ago will not cut it in the post-recessionary graphic communications environment. It’s a small (global) world out there, and success in the future will require making it smaller still, by looking beyond our borders—or even on the other side of an ocean—for the most advantageous markets, partnerships and opportunities. It’s also a changing world, in terms of the technologies and print products most important to the end client. Yes, the global recession did make quite an impact on our industry. But if we consider these trends, the future holds much promise.

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Global Machinery Market, 2008 - 2014 (US$M, current prices)

<table>
<thead>
<tr>
<th>Category</th>
<th>2008 ($21,715)</th>
<th>2014 ($725.2 B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electrophotography</td>
<td>$1,343 6.2%</td>
<td>$1,337 5.4%</td>
</tr>
<tr>
<td>Prepress</td>
<td>$1,406 6.5%</td>
<td>$1,745 7%</td>
</tr>
<tr>
<td>Postpress</td>
<td>$1,617 7.4%</td>
<td>$2,003 8.1%</td>
</tr>
<tr>
<td>Inkjet</td>
<td>$1,844 8.5%</td>
<td>$2,412 9.7%</td>
</tr>
<tr>
<td>Sheetfed</td>
<td>$5,613 25.8%</td>
<td>$5,158 20.2%</td>
</tr>
<tr>
<td>Coldset/heatset</td>
<td>$2,703 12.4%</td>
<td>$3,357 13.5%</td>
</tr>
<tr>
<td>All other traditional presses</td>
<td>$3,032 14%</td>
<td>$4,570 18.4%</td>
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<tr>
<td>Spares</td>
<td>$3,032 14%</td>
<td>$4,112 11.1%</td>
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With the importance of high-end finishing to increase the value-added of print products, postpress equipment will see growth of almost 8% by 2014 to $1.75 billion. All other markets are predicted to suffer significant declines with some more than 20, 30 and 40%. (Film imagesetters, not surprisingly, will plummet by 65% between 2008 and 2014.)

Package printing, postpress stand out

Finally, for those wondering which print products and company types we can expect to see more of in the future: How about package printing? Package printing, a $203 billion market in 2008, is forecast to grow by 21% to $246.4 billion in 2014.

Demographics play an important role in this area. A growing middle class, particularly in such population-heavy developing countries as China and India, has led to millions more people in the world buying packaged goods. At the same time, a rising number of consumer households—not to mention time-poor consumers—in developed nations has created a demand for single-portion packs and other convenience-oriented formats.

At the September meeting of ISO TC 130-Graphic Technology, it was agreed to form a task force to investigate the appropriate-ness and extent of new standards relating to carbon footprint issues in the printing/publishing industry. TC 130 Task Force 1 will be led by Laurel Brunner of the UK. Work will be coordinated with ISO TC 207, the committee responsible for environmental management standards.

A call for experts to participate in this work has been issued by the TC 130 Secretariat. This work is open to anyone who has an interest and is knowledgeable about print processes, carbon footprinting and environmental management.

Additional information on this work can be found in the TC 130 Call for Experts document, available online from the NPES Standards Workroom at: http://www.npes.org/Standards/TC130/TC130HotFootprinting.htm.

If you are interested in participating in this work, or have questions, please contact Mary Abbott at e-mail: mabbott@npes.org or Debbie Orf at e-mail: dorf@npes.org in the NPES Standards Department. •
NPES Tells Congress to “START OVER” on Health Care Reform

With health care reform legislation already passed by the U.S. House of Representatives and the Senate working feverously to complete action on its two thousand-plus page massive overhaul of the U.S. health care system before the end of the year, NPES has joined the chorus of concerned businesses and associations in imploring Congress to stop the rush to enact a very damaging “reform” bill and to “START OVER,” because the current legislation is too flawed, convoluted, and costly to be fixed.

NPES has also urged its members to communicate the same message to each of their U.S. senators (visit http://bit.ly/Senateletter).

In communicating NPES’ concerns to Congress, NPES President Ralph Nappi has stressed that “both the House and Senate bills are full of costly mandates that will lead businesses to lower wages, reduce hours, delay if not eliminate hiring, and worst of all cut jobs.”

Adding to Nappi’s concerns, NPES Government Affairs Director Mark J. Nuzzaco notes that from a more macro perspective, “despite budget gimmicks both measures will massively expand the national deficit and debt by adding huge new spending programs and entitlements, and pass on half a trillion dollars in new taxes to businesses—many of them small enterprises—and their employees.”

Even after spending over a trillion dollars both “reform” bills will still leave millions of Americans uninsured, and even more troubling will likely cause millions of other workers to lose their existing employer-sponsored health insurance.

In addition to these general concerns, preserving Health Savings Accounts has been a special focus of NPES during the health care reform debate. HSAs were created by the Medicare bill signed by President Bush in 2003 and are designed to help individuals save for future qualified medical and retiree health expenses on a tax-free basis.

NPES has emphasized to lawmakers that HSAs are a proven means by which to tap the power of cost-conscious consumerism by putting employees in control of their own routine health care costs, while still providing coverage for catastrophic illnesses. Regrettably, these effective and time-tested vehicles are in jeopardy of being damaged or discarded in the name of health care “reform.”

In urging Congress to stop and “START OVER,” NPES is not without a positive alternative. Specifically, the Association strongly supports a simple three-pronged approach: 1) get costs under control, 2) improve insurance options, and 3) create a vibrant and more accessible marketplace for insurance vehicles.

For example, enact medical liability reform, give incentives for life-styles that enhance wellness and encourage preventative care, provide small business the ability to engage in insurance pooling, and simplify administrative paperwork.

As NPES President Ralph Nappi emphasizes, “cost-effective true health care reform is too important to NPES’ members to not stop, ‘START OVER’ and get it right.”

For more information contact NPES Government Affairs Director Mark J. Nuzzaco at phone: 703/264-7235 or e-mail: mnuzzaco@npes.org.

Status of legislation as reported at NPES News press time.
House Votes to Make Estate Tax Law Permanent; Senate Action Unclear

The U.S. House of Representatives has voted to permanently extend the Estate Tax at its current level of 45% on estates above $3.5 million per individual and $7 million per couple. But it is unclear what action, if any, the Senate may take before 2010 when the “Death Tax” is set to expire under current law.

Because many Association members are relatively small family-owned businesses, permanent Estate Tax relief has been a longstanding NPES Government Affairs priority. To advance this priority in the 111th Congress, NPES has joined with a number of other small business organizations in urging Congress to act now to provide permanent Estate Tax relief.

Organized under the auspices of the Small Business Legislative Council, NPES and other small business advocates have called on Congress to enact a permanent individual Estate Tax similar to that which passed the House by a 225 to 200 vote, total permanent repeal of the Estate Tax not seeming to be politically likely.

Under The Economic Growth and Tax Relief Reconciliation Act of 2001 the Estate Tax is scheduled to be repealed completely in 2010, but will be reinstated in 2011 at its pre-Bush Administration level of 55 percent, with an exemption of only $1 million unless Congress and the President act to forestall that reversion.

President Obama’s 2010 budget takes the position that the estate tax should be maintained at its 2009 parameters in 2010. This means that the “death tax” wouldn’t fall to zero next year as scheduled under current law, but estates will be taxed instead at up to 45%, with an exemption level of $3.5 million (or $7 million for a couple).

While the Obama 2010 budget position comports with the objectives of the new Estate Tax coalition, it won’t be permanent unless Congress and the President act to make it so. Hence, the two key objectives of the new coalition: 1) a $3.5 million exemption that would give relief to the vast number of small entrepreneurial businesses whose competitiveness and sustainability are impeded by the Estate Tax itself, along with the unnecessary and counterproductive estate planning expenses it fosters, and 2) the certainty of a permanent reduction of the Estate Tax rate.

While Senate leaders are reportedly meeting to figure out a way forward, which could include a permanent measure similar to the one enacted by the House, or a one or two year extension of current law, Senators. Jon Kyl (R-AZ) and Blanche Lincoln (D-AR) are pushing a measure that would reduce the estate tax rate to 35%, with an exemption of $5 million per individual. And Finance Committee Chairman Max Baucus (D-MT) and Budget Chairman Kent Conrad (D-ND) have been pushing to have the exemption amount indexed for inflation.

For more information contact NPES Government Affairs Director Mark J. Nuzzaco at phone: 703/264-7235 or e-mail: mnuzzaco@npes.org.

Status of legislation as reported at NPES News press time.
The Secret to Marketing Magic? Positively Print!

Among the essential elements of any successful marketing campaign is print. Now a newly-created recognition program, named Positively Print, will encourage companies with a vested interest in print to market the value of the printed product to corporate marketing executives, advertising agency personnel, print buyers, media specialists, buying influencers and the business public through their individual advertising and promotion activities.

The Positively Print program will be conducted as a part of the EXECUTIVE OUTLOOK Conference through the MUST SEE’EMS recognition program, administered by the PrintCom Consulting Group. The Positively Print program will recognize the ‘best of the best’ examples of promotional initiatives that encourage, promote and stimulate print demand, based on its value and effectiveness, as a vital and integrated component within a highly competitive media landscape.

Entries selected for recognition by the program’s panel of industry experts will be announced on October 2, 2010, during the EXECUTIVE OUTLOOK Conference to be held the day before GRAPH EXPO opens, October 3-6 in Chicago’s McCormick Place. Thereafter, the program will run on an annual basis.

Any company, association, industry group, or print-interested party is invited to provide a submission to the Positively Print program for consideration. Entries may be either print buyer-targeted advertising or campaigns specifically promoting print, or include the Positively Print message as a part of their own corporate branded technology or product advertising/promotion media placements.

Positively Print program nominations may be submitted by anyone, including print suppliers, who can enter their own campaigns or those created by others, as well as those by advertising agencies and public relations firms. Entry into the Positively Print program is free. To qualify for Positively Print recognition, the message must:

• promote print
• be circulated by, or distributed through, media seen by a significant share of the targeted print buying audience or general public; and,
• have appeared anytime from 2009 through July 2, 2010.

The Print Council, Graphic Arts Show Company (GASC) co-owners NAPL, NPES and the Printing Industries of America are supporting the Positively Print program by announcing it to their memberships and actively seeking supplier support.

Positively Print program entry forms are available for download at: www.positivelyprint.org/index.html. For more information contact William Lamparter, PrintCom Consulting Group at phone: 704/843-5350 or e-mail: PositivelyPrint@aol.com.

Remembering
Sy Weinstein

Sy Weinstein, CEO and Chairman of Graphics LX Corporation in Holliston, MA, was an active member of NPES who generously shared his leadership, energy and passion for our industry through his service on the NPES Board of Directors (1982-1989), Long Range Planning Committee (1990-91), Show Committee (1984-2001), and Statistics Committee (1984-98). NPES remembers Sy, who passed away on October 12, for his dedication and many contributions that have made a significant impact on our Association and our industry.
Introducing News Print

First-Ever Newspaper Pavilion to Debut at GRAPH EXPO 2010

GRAPH EXPO 2010, the year’s largest graphic communications tradeshow in the Americas, slated for October 3 – 6, 2010, in Chicago’s McCormick Place South, will debut News Print, a special interest pavilion dedicated exclusively to the newspaper publishing industry. Sponsored by News & Tech Magazine, News Print will feature equipment, products and services, and networking opportunities devoted to the needs of newspaper publishers and printers. A selection of educational seminars of particular interest to newspaper publishers and printers will additionally be integrated with the new show floor feature.

“GRAPH EXPO has always included product and educational offerings geared to those in the newspaper business,” said Ralph Nappi, President of the Graphic Arts Show Company (GASC). “Given the monumental changes the publishing industry has undergone in recent years, however, and as key exhibitors told us, GRAPH EXPO 2010 needed to go the next step and provide a pavilion dedicated more fully to the needs of this market segment. Thus News Print will feature not only a full array of exhibitors, equipment and products covering all aspects of the newspaper publishing industry, but also innovative ideas for cutting costs and boosting profits. Ultimately, we hope it will provide a place for newspaper production professionals to connect with others who understand the unique challenges and opportunities that lie ahead for newspapers.”

“News & Tech is proud to sponsor the inaugural News Print at GRAPH EXPO 2010,” said Publisher Mary L. Van Meter. “We know the role innovative technology plays in newspaper production, and the steps newspapers have taken to streamline and improve their operations to compete in today’s marketplace. Newspapers need a venue where they can effectively shop for the products and technologies they need to operate effectively; GRAPH EXPO 2010 and News Print will be that place.”

Supporting the timing and need for this special show floor section dedicated to the newspaper publishing segment, Vince Lapinski, CEO, manroland Inc., advised, “The progressive newspapers have been working with us toward more commercial work recently. GRAPH EXPO will give newspaper managers an opportunity to consider a wide range of graphic arts offerings from software to commercial presses. The whole atmosphere of this show is about solutions and innovative product development—there’s just more energy on the floor. manroland sees this as perfect timing to integrate the two print communities into one venue.”

Jochen Meissner, President and CEO, GOSS International, applauded GASC’s responsiveness to today’s changing market trends with the introduction of News Print stating, “The production requirements and the business models for newspaper and commercial printing are converging. Printers and publishers will appreciate having a single annual show where they can explore a more complete range of technologies, and we are pleased that GRAPH EXPO has moved in this direction.”

Response to the introduction of the News Print section at GRAPH EXPO 2010 has also been immediate and positive from the printer/publisher community, as Paul Lynch, Senior Manager of Quality, The Chicago Tribune stated, “The newspaper industry production and commercial print programs need a home and GRAPH EXPO will be a great place for it. The Chicago Tribune will be there.”

J. Austin Ryan, VP Operations, USCP Gannett, echoed the value of introducing News Print at GRAPH EXPO 2010, stating that he is “Looking forward to GRAPH EXPO as it has traditionally offered solutions to the challenges ahead for newspaper printers as we look for ways to drive revenue with expanding both our print and distribution models to our customers. GRAPH EXPO provides those solutions in multiple forms through session education, networking and vendor exhibitions.”

Fellow attendee Kathy Hunter, General Manager, Transcontinental, added, “The convergence of commercial printing and newspapers is happening. Transcontinental is excited about the addition of News Print at GRAPH EXPO 2010. This will provide even more value in attendance as GASC offers strong programs for newspaper production professionals”

News Print will feature equipment demonstrations and plenty of opportunities for attendees to see, touch and explore those products and services most important to them, including:

• Hybrid production equipment
• Digital presses (hardware and software)
• Offset presses
• CTP and associated plate bending/punching equipment
• Production workflows
• UV and heatset technology
• Postpress and mailroom equipment, and
• Consumables.

Integrated with the product offerings will be new profit-boosting offerings and ideas, such as Web-based approaches, creative direct mail programs, digital asset management and cost-effective workflow solutions, cost reduction ideas, and personalized content and messaging to increase response rates. A greater array of seminars and educational sessions covering issues specific to the newspaper publishing and printing industry will also be incorporated into GRAPH EXPO’s offerings.
NPES CALENDAR

January 2010
Pamex 2010
January 19-22 • Pragati Maidan
New Delhi, India
www.pamex.in

March 2010
ICC Meeting
March 2-5 • Tokyo, Japan
The 17th South China International Exhibition on Printing Industry
March 9-11 • Guangzhou, China
China Import & Export Fair Pazhou Complex
NPES Member Booth and Trade Mission

March 24-26 • St. Paul, Minnesota

April 2010
TC 130 WGs
April 19-24 • St. Gallen, Switzerland
TC 130 WGs
April 27-29 • Miami, Florida

May 2010
IPEX
May 18-25 • Birmingham, UK
National Exhibition Center
NPES Member Booth and Trade Mission

Printtek 2010
11th International Print Technologies and Paper Fair
May 29 – June 6 • Istanbul, Turkey
Tüyap Fair, Convention and Congress Center
NPES Member Booth and Trade Mission

June 2010
ICC Meeting
June 21-24 • Bressanone, Italy

EXOPRINT Latin America 2010
Transamerica Expo Center
June 23-28 • Sao Paulo, Brazil
NPES Member Booth and Trade Mission

September 2010
Central and Eastern European Print Industry Summit
September 9-10 • Warsaw, Poland

October 2010
EXECUTIVE OUTLOOK Conference
October 2 • Chicago, Illinois
GRAPH EXPO
October 3-6 • Chicago, Illinois
TC 130 WGs and Plenary
October 10-16 • Sao Paulo, Brazil

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news and notes

GAERF Student Design Competition

CONGRATS TO 2009 WINNERS, 2010 CHALLENGE REVEALED

The Graphic Arts Education and Research Foundation (GAERF) announced the winners of the GAERF 2009 National Student Design Competition from among more than 85 entries. Six winners were chosen, three at the secondary level and three at the post-secondary level. Winners at the secondary level were:

1st Place: Ryan Lelek from Lake Central High School, St. John, IN (Instructor: Jeremee Rainwater);
2nd Place: Bethany Lopes from Newport Area Career Center, Newport, RI (Instructor: Jill Arakawa); and,
3rd Place: Nathan Shaefl, Royal Oak High School, Royal Oak, MI (Instructor: Frank Przybylo).

At the post-secondary level, the winners were:

1st Place: Melissa Andrews, Waukesha County Technical College, Pewaukee, WI (Instructor: Terry Rydberg);
2nd Place: Heidi Boucher and Stephanie Shearon, Autry Technology Center, Enid, OK (Instructor: Cheryl Licklider); and,
3rd Place: Jordi Camps and Iris Garcia; Modesto Junior College, Modesto, CA (Instructor: Alan Layne).

The contest themed ”Careers in Graphic Communications…Imagine the Possibilities” challenged students to design and produce a marketing product that could be used to encourage young people to investigate the many exciting career opportunities in the graphic communications/printing industry. First place winners and their instructors received two-day all-inclusive paid trips to attend PRINT 09 and a $2,000 award, which was presented during PRINT 09 Career Awareness Day. Second place winners were awarded $1,500, and third place winners received $1,000.

Raising the bar for GAERF’s 2010 National Student Design Competition, students at the secondary and post-secondary levels will be challenged to: create the theme for GRAPH EXPO 2011; design artwork to support the theme; and, produce a printed item promoting the theme. Applications with complete submission details will be mailed to more than 600 secondary and postsecondary graphic communications programs in January.