NPES Releases Data on Production Digital Color Presses

EQUIPMENT MARKET MUCH LARGER THAN PREVIOUSLY REPORTED

If you have been following the periodic reporting of NPES members’ shipments of equipment and supplies, you are probably aware that there was always one important caveat on the data. Our data did not include digital presses, which were believed to be a significant portion of the equipment market. The NPES program collected data on the traditional industry equipment mix, which includes pre-press (plate setters, proofing equipment, etc.), offset presses (sheet and web fed) and bindery equipment (cutters, folders, binders, etc.). As the industry evolved and digital printing became a more important part of the equipment mix, NPES endeavored to include this data in the program, but had no success until 2010. For over a year now, NPES has been able to collect and report unit data on production digital color presses, however this did not allow us to combine the digital data with the more traditional analog (offset) data, so we still had an incomplete picture of the marketplace. At the end of 2011, NPES contracted Strategies for Management to produce a reasonable estimate of the dollar volume of the digital equipment based on the unit data that we have collected.

Figure 1 is the result of that process and shows that the dollar value of production digital color presses is well over $1 billion per year. Despite the fact that the Great Recession, which began in December 2007, wreaked havoc on the printing industry and the more traditional offset market (down 20.7% in 2008), the digital press market grew by 14.6%—remarkable in a very tough market. However, the Great Recession did finally catch up with the production color digital press market in 2009 as it declined by 16.3%, yet still totaled over $1 billion. As the recession came to an end in June 2009, the market responded quickly and grew by 10.1% to $1.2 billion in 2010.

A couple of observations about this data:

1. The analog market still exceeded the digital market in 2007, and digital only exceeded the analog market by the slightest of margins in 2008. Offset presses were still the technology of choice through this period.

2. It appears that the Great Recession ignited the shift from traditional offset to digital presses as we can see with the 2009 and 2010 totals, where the volume of digital press sales significantly exceeded the traditional technology market.

3. The NPES program also collects data on the traditional
When Opportunity Knocks

Ralph Nappi
NPES President

Our industry has seen announcement after announcement about cooperative arrangements and partnerships, crafted in various forms, by both printers and suppliers. In some cases, with each other—like KBA and R. R. Donnelly, most in the marketing and sales arena, some good, and for others the value is yet to be assessed. Regardless of the circumstances, the message is clear: yesterday’s competitors are likely to be today’s partners. John Forbes Nash coined the term “cooperation” as far back as 1944 in his book The Theory of Games and Economic Behavior.

The concept is not a new one to NPES or NAPL and Printing Industries of America. As far back as 1982 the industry’s leading associations saw a need to create a cooperative arrangement for the benefit of the entire industry. The resulting entities were the Graphic Arts Show Company and the Graphic Arts Education and Research Foundation. Both have served the industry well, adapting to meet the demands of change, and sometimes stimulating and leading our industry to change.

NPES as an individual association continues to recognize reasons to selectively cooperate with organizations in related areas such as standards, legislative and regulatory, marketing and international. In this issue of NPES News, you’ll see stories related to five partnerships that have been ongoing or are brand new.

In addition to the second annual Vision 3 Summit later this month sponsored together with Printing Industries of America and NAPL, you’ll also see reference to our second Joint NPES and Printing Industries of America Government Affairs Fly-In slated for June, and the announcement of our first-ever Executive Briefings with NAPL. Some of you will remember that NPES developed our Road Shows five years ago—but this is the first time we will be partnering with NAPL to host these events in four cities across the country in May and June. Why this new cooperative relationship? The answer is easy: we need to keep creating new value in our programs, even those that are only a few years old. NAPL has a great track record of partnering with NPES, and who better can address our industry’s future and how to handle it than the major players in the commercial print supply channel?

NPES members have stated that the best way to engage them in programs is to have customers involved. For those fortunate enough to have Vision 3 on their calendar this month, you’ll have the best opportunity to engage customers here second only to GRAPH EXPO. For those of you who miss it, we’ll come to you in four cities across the U.S. with NAPL members! And for those of you who are ready to share your views with Congress, you’ll have that platform on June 5 and 6 standing side by side with your peers from Printing Industries of America.

The first half of this year provides some ideal opportunities for you to engage in quality networking with customers with the added benefit of a solid agenda of education and advocacy.

When ‘opportunity knocks,’ it comes in many forms—through creative partnerships; forums to speak out on legislative and regulatory issues that are, or will, impact our businesses; and, new learning and business networking opportunities. When high-value opportunities like these ‘come knocking,’ I hope you will find the time to ‘open the door’ and participate.

John Foley, Chief Executive Officer, Grow Socially
Joseph P. Truncale, Ph.D., NAPL President and Chief Executive Officer

SAVE THE DATES
NEW FOR 2012!
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Four Power-Packed Sessions in an Informative, Fast-Moving Program

DATES AND LOCATIONS:
- May 23, 2012 · East Rutherford, NJ
- May 24, 2012 · Boston, MA
- June 11, 2012 · Chicago, IL
- June 12, 2012 · Dayton, OH

Each session: 8 a.m. - 2 p.m.

SPEAKERS AND TOPICS:
- Emotional Intelligence: What Every Business Leader Must Learn, and Why It’s Critical for Your Organization’s Success
  Carl Henry, Principal, Carl Henry Associates
- New Technologies That Will Revolutionize Print
  John Jay Jacobs, Visiting Lecturer, Department of Graphic Communications, Clemson University
- How Social Media Marketing Drives Business Results
  John Foley, Chief Executive Officer, Grow Socially
- The Leadership Edge: How Top Industry Leaders Get There—and Stay There
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consumable supplies used by printers, which includes film, plates and proofing products. A future expansion of the digital program would be to include revenue from “click charges,” service agreements and consumable supplies utilized on digital presses, such as toners and digital inks.

**About This Data**

The NPES analog data is for prepress (platesetters, proofing equipment, etc.), offset presses (sheet and web fed) and bindery equipment (cutters, folders, binders, etc.).

The NPES production color press data includes light and heavy production equipment sold to the commercial and in-plant printing industry. This includes newspapers, magazines, books, direct mail, marketing collateral, packaging, etc.—all of the traditional printing industry segments. Sales of production devices to the office market are not included in this data, unless it goes to the “in-plant printing facility” within the corporation. This distinction is more important with the “light” production devices. Duty cycles reported in this program include under 500k/month through over 10 million/month. Data includes an estimate of the retail value of the equipment. This data does not include “click charges,” service agreement revenue, and consumable supplies, which are other significant sources of revenue in this market.

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**NPES Government Affairs Capitol Hill Fly-In**

In conjunction with Printing Industries of America

**Washington, D.C., June 5-6, 2012**

**You are Invited and Needed:** All Association Members are encouraged to participate.

NPES Government Affairs Committee Chairman Mike Ring, President, Xeikon, will lead NPES’ public policy advocacy Capitol Hill Fly-In on June 5-6, 2012. Activities will include:

**Tuesday, June 5, 2012**

- **Welcome Luncheon,** 12:00 noon, Capitol Hill Club, followed by NPES Government Affairs Priorities issues briefings
- **Congressional Reception and Dinner,** Capitol Hill Club

**Wednesday, June 6, 2012**

- **Breakfast Meeting,** 8:00 am, Capitol Hill Club
- **Congressional Office Visits** during the morning and afternoon
- **Congressional Luncheon** 12:00 noon, location TBA, featuring senior leaders of the U.S. Senate

**Event Location:**

Capitol Hill Club, 300 First Street, SE, Washington, DC 20003 • 202/484-4590

Fly-In participants are also invited to stay on for the National Association of Manufacturers’ Manufacturing Summit, June 6-7. For more information, visit: www.nam.org.

"The NPES Government Affairs Capitol Hill Fly-In will be an excellent opportunity to meet with government officials and explain the industry’s views on a wide range of public policy issues that have a direct bearing on NPES members’ business interests."

—Mike Ring

NPES Government Affairs Committee Chairman & President, Xeikon

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

*Co-hosted by NPES and Printing Industries of America*
Industry veteran Carl Joachim shares his perspective on the challenges and changes to an industry in transition.

You’ve spent over 20 years in our industry, having held executive positions with Xerox, Océ, and Ricoh. For the past five years you were deeply involved in the creation of Ricoh’s Production Printing Group, as vice president of marketing. Given your breadth of experience, can you reflect on some of the changes you’ve witnessed in the industry during that time?

I’ve been fortunate in that I came into our industry having been a customer. When I joined Xerox in 1990, I was vice president of operations for Crum & Forster Insurance, a Xerox Financial Service Company. One of the projects we were working on was the transition of policy print from multipart forms produced on impact printers, to a digital electrophotographic process. We were re-engineering everything from our mainframe application software to finishing equipment to achieve the ROI we needed. We began the project in the late 80’s and were very much at the forefront of how digital print was being used, which began in the data center. Once we got policy print converted to digital, we focused on our in-plant operation. We created one of the first printing and publishing organizations that integrated digital printing for both transaction and print on demand (POD) applications. At the time the industry called it “convergence.”

At the same time Xerox was creating industry vertical segments to market digital production printing, insurance was the first industry they focused on. In 1990 I moved from the insurance subsidiary to Xerox and ran their Insurance Industry Marketing group as my first assignment. Insurance was vital to Xerox success, since its products are documents, and the industry runs on documents. This proved to be a very successful approach, and I eventually moved on to other assignments.

In 2000 I joined Océ Printing Systems as vice president of marketing. For most of my tenure there I focused on continuous feed devices, which were doing well in transactional environments printing bills and statements, but not so much in POD. Through the development of some very good products and a creative marketing approach to commercial printers, we were able to make significant in-roads in the adoption of continuous feed in this space. I think this was significant because none of our competitors at the time could really make the jump from the data center to professional printing establishments with this type of technology.

While there is much I could focus on over the past 20 years, the rate of technology adoption tends to accelerate as time goes on, so I’d like to focus on two changes that stand out.

First, the recession accelerated the decline of print volumes and run lengths. Much of that volume will not come back, at least not the way it was, so printers suddenly found themselves in crisis mode. Digital print is tailor-made for printers needing a better way to produce short runs and offer expanded services, and this spawned the second major change, and that’s the rapid adoption of alternative media (web, mobile, social, digital print, social). Printers can now truly offer services-based added value without a huge investment. Multi-channel marketing services are a great example. The key is to recognize that the file is digital, printing is one option, but there is so much more that can be done with it to diversify a printer’s business. Skills in database management, digital design, marketing, and graphic communication will be needed. Printers will need to hire and/or educate people with a much different skill set than they did in the past.

With all of us sharing in the stewardship of our industry, what are some of the ways the industry actively promotes the facts on the effectiveness and sustainability of print?

My most recent experience is with Ricoh, who for years has been recognized as a world leader in environmental sustainability. The world’s first eco-friendly, solar-powered billboard in New York’s Time Square is one very visible example of how Ricoh promotes their commitment.

I also like what the Printing Industries Association of Southern California (PIASC) has done with their “Choose Print” marketing campaign. It calls attention to the misconceptions people have about print killing trees. In fact, once the facts are known, the opposite is actually the case.

As the industry continues to change and adapt, particularly in the Commercial and In-Plant printer space, what do you see in the next three to five years?

I believe the transition to digital media has just begun, and the successful commercial printers and in-plants will need to embrace what will come, much of which is hard to predict looking back on how rapidly technology has evolved recently. Education and keeping pace with the skills required to be successful will be paramount. Continued rapid adoption of cloud-based technology, and mobile and tablet-based applications will transform how we communicate, and learn. In some cases this will be at the

One on One

Carl Joachim “I have a passion for our industry and the people in it, and in particular the phenomenal technological change it is going through.”
expense of print, but in all cases it will present new opportunities for enterprising companies to find new ways to add value to new processes, whether they be marketing services, payment processing, or fulfillment.

As for print, digital color printing will continue to advance at the expense of offset and other traditional methods. There will be some applications that will be less affected, for example packaging, but that too will change with new printing technologies and substrates currently in development. In fact, packaging is one of the few print applications forecasted to grow pretty substantially.

Through our industry’s peaks and valleys how has NPES assisted in helping it adapt and grow?

A number of years ago, around 2006 I’d say, I was asked to represent Ricoh by attending an industry focus group sponsored by NPES and GASC. The subject was what GRAPH EXPO needed to do to stay relevant to the industry’s needs. I remember Tom Wetjen (Xerox) and I being particularly animated about the need to move much faster to digital content, and in particular workflow.

In my view, NPES (and GASC) listened, and GRAPH EXPO provided the perfect stage for what we wanted to accomplish. When Ricoh entered the digital production market with the launch of the Pro C900 in 2009, it was at GRAPH EXPO that we made the announcement. In looking at how attendance has bounced back at GRAPH EXPO since the recession, and the number of companies that plan co-located meetings at the venue, I’d say NPES is right on course.

So now that you’ve left corporate life, what’s next?

I plan to stay busy and focus on the things I have an interest in, and where I can make a difference.

I have a passion for our industry and the people in it, and in particular the phenomenal technological and cultural change it is going through. I see printing companies struggling either due to the economic realities of our time, or the changes created by emerging technologies. I think I can help companies focus on their business strategy, marketing, and technology, and how they interrelate in today’s business climate.

I’m also active on the Cal Poly Graphic Communication Advisory Board and will be involved in a growing Cal Poly/Industry initiative called “Expressive Technologies.” ET, as we call it, will explore all forms of communication, how technology will impact it, and how our culture, in turn, will be affected. Cal Poly is perfect to drive this initiative with their strengths in both the liberal arts and polytechnic studies.

2012 Critical Year for Tax Policy

50% BONUS DEPRECIATION STILL AVAILABLE UNTIL 2013

2012 is a critical year for expired and soon-to-expire tax relief provisions, not to mention speculation about sweeping tax reform that could be on the horizon for the next Congress and president. For example, 50 percent bonus depreciation is still available for qualifying plant and equipment, but will expire January 1, 2013. The bonus depreciation rate of 100 percent that was available during 2011 expired January 1, 2012, and it remains to be seen whether it will be extended as a part of the House/Senate conference report on H.R. 3630, Temporary Payroll Tax Cut Continuation Act of 2011, legislation passed at the end of 2011 that extended until February 29, 2012 the temporary payroll tax holiday, unemployment insurance benefits, and the so-called “doc fix” sustainable growth rate (SGR) formula, which determines how much doctors are paid to treat Medicare patients.

Other expired or expiring tax relief provisions that could also be considered for inclusion in the conference committee report include the Alternative Minimum Tax exemptions, Research and Development Credit, IRC Section 179 expensing (set at $500,000/year), and the Smaller Business Jobs and Credit Act of 2010 and Reinvestment Tax Act of 2009 continues for equipment placed-in-service before January 1, 2013.

• Qualifying property continues to include depreciable tangible personal property purchased for use in the active conduct of a trade or business including, printing, publishing and converting equipment, as well as off-the-shelf computer software.

• IRC Section 179 expensing (set at $500,000/year with a phase-out starting at $2 million/year for tax years beginning in 2010 and 2011) continues through tax years beginning in 2012, but at the lower level of $125,000/year with a $500,000 phase-out.

• The expensing cap and phase-out amounts will revert to $25,000 and $200,000 respectively in 2013.

• Unlike bonus depreciation, expensing applies to both new and used qualifying property, and is subject to annual dollar, investment and taxable income limits.

• The refundable corporate AMT (Alternative Minimum Tax) credit continues.

• Specifically, corporations will be able to utilize their AMT credits in lieu of bonus depreciation on property placed-in-service in 2011 and 2012.

• This election will allow a taxpayer to “monetize” its AMT credits generated before 2006, and will equal the lesser of 20 percent of the additional first-year bonus depreciation foregone, or 6 percent of the AMT credits generated before 2006 that were available for the first taxable year ending after March 31, 2008.

• However, in no event will the credits be allowed to exceed $30 million, and straight-line depreciation must be used for such property. There are also special rules for corporations that are part of controlled groups or partnerships.

NPES cautions that this article is solely informational and does not constitute legal, financial, investment or other advice from NPES. Readers are advised to seek professional counsel from their own financial, accounting and legal advisors to apply these incentives and other tax laws to their particular circumstances.

For more information, contact NPES Government Affairs Director, Mark J. Nuzzacco, at phone: 703/284-7235 or e-mail: mnuzzacco@npes.org.
**Printed Electronics Becoming More Relevant to Our Market Segments**

Printed Electronics is on the verge of becoming a relevant technology for several of our market segments. Organic LEDs, flexible displays, RFID tags, printed discrete devices, as well as printed photovoltaic devices, are making an impact in consumer, commercial and specialty electronics markets.

One of the most important benefits of this emerging field is the use of printing technologies for low-cost volume fabrication of electronic products. In addition, the ability to print on flexible substrates allows for placement of electronics on curved surfaces, for example, placing solar modules on vehicle roofs. Conventional semiconductors justifiy their much higher costs by providing much higher performance. Conversely, printed electronics is being promoted as a lower-cost technology that provides greater product design freedom.

NPES is working with Dan Gamota, Printovate Technologies, Inc., and IPC the Association Connecting Electronics Industries, to develop and shape the emerging field of printed electronics. According to IDTechEx, a provider of market research in printed electronics, RFID, thin film photovoltaics and smart packaging, the global market for printed electronics this year is $2.2 billion. By 2021 it is predicted that the market will be worth $44.25 billion, with 56% of products printed and 43% on flexible substrates.

In December 2011, NPES President Ralph Nappi attended the Printed Electronics & Photovoltaics USA 2011 tradeshow in Santa Clara, CA. The following are just a few examples of working technology, some of which are printed and flexible, that were showcased there:

- **Rollable E-paper Display**
  The most prominent commercial success has clearly been e-paper, which has been in use for e-readers such as the Amazon Kindle and B&N Nook. That market has tripled every year since 2006 and now accounts for $180 million in sales. IDTechEx forecasts that worldwide e-reader sales will top $2.1 billion by 2017.
  PolymerVision showcased their truly rollable display capable of showing animated images. This is good news for printed electronics since flexible displays could provide a platform for a plethora of printed components, enabling large new markets.

- **Replacement for Touchscreens**
  A resistive touchscreen panel made with a Kodak transparent conductive film and featuring completely invisible conductive patterns was demonstrated for the first time at PEUSA 2011. It was built using conventional printing processes, including UV-cured and heat-processed inks. A variety of films and formulations have been used to create a touchscreen that provides superior performance, flexibility, stability, transparency, neutral color, and low haze at an economical price. New technologies such as this are expected to capture up to 20 percent of the touchscreen market.

- **Screen-Printed Silver Conductor Ink**
  Functional inks were showcased that are compatible with many substrate surfaces including polyester, glass and ceramic. Ink technologies are available that are suitable for screen print, ink jet, flexo, gravure, photo-imaging, pad printing, and other processing techniques.

- **New Conductive Materials, EMI-Shielding Film**
  Toyo Ink America, LLC introduced Rexalphã™ conductive inks and electromagnetic interference (EMI) shielding films. Compatible with rotary screen, flat screen, flexo, and gravure, Rexalphã™ inks can be used to fabricate flexible printed circuits (FPCs), RFID-label antennae and EMI shields.
  Printed electronics have been around for a while now, but it seems corporations have only just taken notice. Companies like Procter & Gamble (P&G), Home Depot, Boeing, and Decathlon SA have begun to use, or have plans in place to begin using, printed electronics.
  Printed Electronics Technology Version 2.0—the printing of active devices such as thin film transistors (TFTs) for display backplanes and RFID—has been moving along the technology development curve for the past 10 years. Printed Electronics Technology Version 1.0—the printing of passive devices such as membrane switches for a touch-control panel on a microwave oven—is more than 25 years old. Since the end of 2010, we have seen the blending of these two technology portfolios. It appears that this year may be the turning point as companies begin integrating printed electronics technologies (materials, substrates, roll-to-roll manufacturing format, processes, devices, components, and more) in a variety of automotive, aerospace, communications, medical, and smart grid applications.

  IPC the Association Connecting Electronics Industries last year established a Printed Electronics Committee (D60) with four subcommittees (D61, D62, D63, and D64) to develop standards for companies to facilitate the seamless integration of printed electronics technologies in future products. The IPC Printed Electronic D60 Committee is reaching out to the printing industry seeking those with the expertise to participate in the development of standards for these emerging technologies—functional inks, substrates, design for printing, quality control methods and tooling, etc.

  Dan Gamota, chair of the IPC Printed Electronics Committee states, "My goal is to help establish a portfolio of standards that have been produced by subject matter experts in the different technologies (printing, functional inks, graphic arts, and electronics) that together form the emerging printed electronics field. We want to make sure that the standards touch upon the nuances introduced by the different technologies and, therefore, the standards are considered as complete as possible when published. As the printed electronics field grows we will revisit the standards and update them as necessary."

  Each IPC subcommittee has a specific topic that it is addressing:
  1. Subcommittee D61 is performing an environmental scan of best practices to begin to draft Design Guidelines for Printed Electronics (IPC-2291);
  2. Subcommittee D62 is preparing for ballot a draft standard titled Requirements for
Printed Electronics Base Materials (IPC-4921), which provides technical information for flexible substrate materials such as paper, polyamide, polyester, metal or glass used for solar, batteries, membrane switches, displays, etc.;

3. Subcommittee D63 is circulating a draft document for comments named, Requirements for Printed Electronics Functional Materials (IPC-4591). This standards document discusses additive materials such as: conductive functional inks that are printed for use in touchscreens and RFID antennae; and,

4. Subcommittee D64 is beginning to draft the Performance Requirements for Printed Electronics Assemblies (IPC-6901), which will establish the necessary performance requirements that determine the operating environment in which the printed electronics assembly is going to appear, for example in high temperature or moisture environments.

Subcommittee D61 is tasked with one of the most critical topics for success. In response to the question of whether file formats used to record and transmit designs for printed electronics will be addressed by Subcommittee D61, Mr. Gamota stated, “We have typically used electronic design layout software to create a design and later converted it to PDF or DFX for the printer to manufacture the product. A standard for file format design and transmission is necessary to establish and sustain the growth of the industry. The technology developers have commented that without this standard, printed electronics may not grow past a niche technology.”

As the application of standard print equipment grows to fit and support printed electronics manufacturing, the ability to specify and test a workflow will be important.

Currently, a direct PDF interface is not available; however, in the long term it is expected that the transition to PDF will occur, since using PDF eliminates calculation errors, assures data integrity, and minimizes the opportunity for routing mistakes.

If you are interested in participating in the development of standards for this exciting new field of technology, or would like further information, contact Debbie Orf, NPES Assistant Director of Standards, phone: 703/264-7200 or e-mail: dorf@npes.org.

Booth Space for NPES Members at drupa

Does your company still need booth space at drupa? Good news! We have just been informed that some booths have opened up in the U.S. pavilion. For complete information contact:

Eva Rowe
312/781-5180
erowe@mdna.com

International Business Opportunities in 2012!

Here’s What an NPES Trade Mission Can Do for You!

- **Deliver** a source of cost-effective primary market research
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- **Facilitate** dialogue between local firms, promising customers, or joint-venture partners
- **Assist** in building relationships with foreign buyers and or investors

Trade Mission to Indonesia

April 19-28 **DEADLINE: March 5, 2012**

In the world’s 5th most-populated country, the growth of the printing industry is dependent on imports for most of its printing equipment and basic printing supplies such as plates, inks, and chemicals. With political and economic stability, Indonesia’s government is seriously working toward development of a road map for the printing industry’s next 25 years.

Indonesia’s improving growth prospects and sound macroeconomic policy have many analysts suggesting that it will become the newest member of the “BRIC” grouping of leading emerging markets.

Join the NPES Booth at drupa, Düsseldorf Germany

May 3-16 **DEADLINE: March 31, 2012**

In 2008, 1,971 exhibitors from 52 countries and 390,000 visitors from 140 countries attended drupa. If your company is looking for a cost-effective way to network with these potential customers, the NPES Booth is YOUR solution.

Trade Mission to Colombia and Brazil

Sept. 15-23 **DEADLINE: August 1, 2012**

Join us in visiting two power printing nations! The Latin American printing industry has experienced a period of growth and stability over the last 6 years. Despite the global financial crisis of 2009, an impressive recovery took place in 2010. Plus, in Brazil, trade mission participants will take in the Trends of Print Latin America conference for a hands-on local viewpoint of technical and market information and the latest trends in the Graphic Communications Industry worldwide.

For more information, contact Pernilla Jonsson, NPES Assistant Director-International Trade at phone: 703/264-7200 or e-mail: pjonsson@npes.org.
PRIMIR Market Research Gives NPES Members a Competitive Advantage

In today’s economy, as markets shift and evolve, it’s vital for all in the graphic communications industry to understand the trends and realities of business, and one of the most valuable industry-relevant areas in which NPES serves its members is through its research arm, PRIMIR.

All NPES members receive an Executive Synopsis of at least two of the studies PRIMIR publishes each year, and may request a copy of the comprehensive report for each at no additional cost. Plus, overviews of PRIMIR study findings are frequently presented at the Vision 3 Summit conferences and NPES Annual Meetings. In addition, from time to time, PRIMIR/NPES staff manage special research studies for NPES. In 2011, NPES members benefited from such studies as:

- Printing Industry Consumables Usage & Trends, and
- Economic Indicators for Print.

Key studies coming in 2012 that will be available to NPES members include:

- Impact of Electronic Technologies on Print
- Evaluating and Understanding Non-Print Revenues of N.A. Printing Companies, and
- Packaging: Evaluation of Vertical Markets and Key Applications.

For more information about PRIMIR, please visit: www.primir.org or contact: Jackie Bland, Managing Director at PRIMIR, phone: 703/264-7200 or e-mail: jbland@primir.org.

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