



news

THE ASSOCIATION FOR SUPPLIERS OF PRINTING, PUBLISHING AND CONVERTING TECHNOLOGIES

GASC Appoints New MUST SEE 'EMS Program Coordinator

The Graphic Arts Show Company (GASC) has announced the appointment of Hal Hinderliter, principal of Hal Hinderliter Consulting Services, as the new program coordinator for the annual MUST SEE 'EMS product and technology recognition awards program. Presented each year since 1999 as part of the pre-show EXECUTIVE OUTLOOK conference at GRAPH EXPO (and PRINT), the MUST SEE 'EMS have become an industry-wide 'roadmap' to the most compelling new print production technology

and products exhibited on the show floor.

Printing industry authority Hal Hinderliter was chosen to administer the MUST SEE 'EMS program following an intensive search and selection process led by GASC. "Mr. Hinderliter's knowledge of the industry and previous service as a MUST SEE 'EMS judge made him the ideal choice to administer the program going forward," stated GASC President Ralph Nappi. "His plans to update the program using current technology will not only simplify the application process for vendors and streamline the judging and reporting process, but also provide greater value for show attendees."

Best known as a prolific author, Hinderliter is a contributing editor to *Quick Printing* magazine and previously wrote for *American Printer*, *Graphic Arts Monthly* and *Printing News*. He has published more than 120 magazine articles and six textbooks. A knowledgeable speaker on prepress and workflow topics, Hinderliter has delivered seminars at numerous industry tradeshows in addition to GRAPH EXPO and PRINT including MacWorld, Seybold, Gutenberg, COMDEX and many others. In his former role as director of the

Graphic Communication Institute at Cal Poly State University, he created custom training programs for industry vendors and managed public workshops. Hinderliter was also the first director of the Center for Imaging Excellence at the Graphic Arts Technical Foundation and served on the Advisory Board to the National Council on Skills Standards in Graphic Communications.



Hal Hinderliter

"Having served as a judge for the MUST SEE 'EMS program since 2007, I can appreciate the valuable guidance these awards provide to GRAPH EXPO and PRINT attendees," said Hinderliter. "Going forward, my aim is to make the MUST SEE 'EMS even more useful for show goers who are considering the purchase of new equipment or software."

Among the goals Hinderliter has set for the 2012 MUST SEE 'EMS program are to expand the pool of judges and also implement an online judging system that will make it easier for them to participate. Similarly, a new web-based application process will make it easier for exhibitors to submit their entries and to include supplement-

tary explanatory images, videos and presentations. Additionally, the awards will be categorized to more closely align with the interests of potential equipment buyers. Lastly, the 'Encore' awards and 'WORTH A LOOK' recognition category will be discontinued in favor of two new recognitions: a 'Best of Category' Award—from within each MUST SEE 'EMS category, and an annual 'Legacy Award'—to salute one past MUST SEE 'EMS awardee whose technology or product has made a lasting impact on the printing industry.

Nominations for GRAPH EXPO 2012 MUST SEE 'EMS may now be submitted online at: www.mustseeems.com. All nominations are due by noon (EDT) on Friday, June 15, 2012. ●



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president's perspective

Taking a Fresh Look: Gaining a Broader Perspective



Ralph Nappi
NPES President

This column is excerpted from the keynote address provided on January 26, 2012 at International Printing Week at California Polytechnic State University (Cal Poly), San Luis Obispo.

I want to touch on three common topics, but bringing, I hope, a fresh perspective to each.

First, the challenges facing the print industry: Not a week goes by without a reference to the consolidation of printers or the woes of suppliers in our industry. But our challenges are no different than those experienced by the coolest cutting-edge high-tech companies. MySpace, once the leading social media pioneer, is now relegated to 'barely mentioned.' RIM, maker of the Blackberry, just announced the resignation of their co-CEOs and even then Wall Street hammered the stock. Print is experiencing a natural business evolution that some refer to as 'corporate Darwinism.' It is not the strongest or the biggest of the corporate species that survives, but the most adaptable.

Despite some contraction, the U.S. print industry is still huge, weighing in

at \$160 billion a year. And when you consider the growth potential of markets like digital and packaging, it's easy to see that there is business to be had and money to be made. Yet, I fear our industry does not look at the broader potential of 'print,' even though printers are moving into mailing and fulfillment, database management and Web site design, or marketing services. But we need to go a LOT further.

Last month, I attended a fledgling show on printed electronics in Santa Clara. By trade show standards, nothing to shout about, but by strategic and marketing standards—amazing! I was impressed by the technology and its future potential BUT only two of the 80 or so exhibitors had links to traditional printing. Why were *our* companies not there?

Printed electronics is currently a \$2 billion industry with potential growth projections of \$44 billion in ten years! Do RFID, thin films, and smart-packaging figure in our industry's future? If yes, print has a great future. Regardless of where this ends up or what it will yield, the effort to explore and innovate could generate that next \$44 billion market like printed electronics.

Secondly, the international market: Ten years ago, Jim O'Neil with Goldman Sachs coined the acronym 'BRIC' to describe future market growth in Brazil, Russia, India and China. He now adds Turkey, Indonesia and Mexico to the list. His predictions for the initial BRICs turned out to be dead-on, and Brazil went beyond his forecast for growth. If O'Neil is half-right, there is still huge potential with the BRIC countries and beyond. Challenging for many—but we need to be where the business is. Think of the troubles of the U.S. newspaper sector, yet India is seeing substantial growth in newspaper publishing.

Yesterday, I met with new NPES board member Nick Bruno with Harris & Bruno International outside of Sacramento. I was astounded to learn that a majority of his business is now outside the U.S., with three offices around the world, and now one in China. Even with challenges associated with intellectual property theft, cultural barriers and currency issues, he said there was no choice but to expand outside of the U.S. Easy? No. Necessary? Yes!

Through travel for NPES' operations in the BRIC countries, I have visited with all types of printers and suppliers. One common theme makes me optimistic about our ability to operate globally—they want to work with us! Our entrepreneurial spirit and innovative nature are valued and respected. And as our language continues as the language of business, we are fortunate to come to the international table with less baggage than many other developed nations. We need to appreciate, recognize and capitalize on that advantage.

Thirdly, we need to advocate for our industry: The print industry is taking an unfair beating for our environmental stewardship and the effectiveness of print. We allow others to define us. Print is not bad, nor does it harm the environment. A recent study by a company in Finland, a provider of online and printed media, found that the printed newspaper is on average a more ecological medium than an online service, based on a comparison of the environmental impacts of one hour of consumption of each media channel. I suspect we won't see the results of that study reported on CNN anytime soon. I know I am preaching to the choir, but are YOU preaching at all?

Finding a way to SHARE, COMMUNICATE and ADVOCATE these facts is vital for our collective future. And I'm not just talking about messages on the

bottom of your emails—good quality dialog should include your elected officials.

Local, state and national legislators make judgments that impact us. You are familiar with local and municipal efforts to create 'do-not-mail' lists that could make sending unsolicited direct mail a crime. Yet, few legislators know that our industry already maintains a national 'do-not-mail' registry that has permitted people to opt out of direct mail for years. Their lack of knowledge can harm us. Right now on Capitol Hill, legislation is being considered to deal with the woes of the U.S. Postal Service. Roughly 40 percent of everything printed goes through the USPS, so what Congress decides has a huge impact on our industry.

Our voices need to be heard. And I do mean 'voices' because 'being heard' by your legislators today is different than it was ten years ago when sending a letter or fax counted. The typical U.S. representative now receives 7,500 e-mails and letters a month; for a senator, it is 18,000! That phone call or face-to-face visit means more now than ever!

My final point is more of a request: let's put 'communicate' back into communication. As we leverage the latest technologies to be more efficient, I wonder if we are just 'sending' without regard to what is being 'received.' We are moving so fast today that quantity sometimes overshadows the quality of communication, limiting our effectiveness. Are we matching the right mediums with the right message? Are our messages being received and understood? When we hit the send button the communication is not done, I would argue that it is just beginning.

So, let's not forget the place for a finely crafted letter, a face-to-face debate, a quick phone call or a handwritten note. It may just make the difference and get you what you really wanted! ●

GRAPH EXPO 2012 Housing Opens With Best Rate Guarantee

Housing is now open for GRAPH EXPO 2012, coming October 7-10, 2012 to Chicago's McCormick Place South.

GASC has negotiated the lowest rates for GRAPH EXPO 2012 exhibitors and attendees at the most popular and convenient hotels in downtown Chicago with special introductory rates. Booking rooms early is encouraged, since these introductory rates are subject to change and will increase as the show approaches.

In addition to the specially negotiated rates, those who book their rooms through the official GRAPH EXPO housing service will enjoy these additional benefits:

- GRAPH EXPO rates are *guaranteed* to be the lowest rates.
- If any official GRAPH EXPO hotel lowers its rates, or lower rates are found, GRAPH EXPO rates will automatically be lowered and new confirmations generated.
- No deposit is required at time of booking.
- No contract is required for exhibitor or group bookings; and
- Complimentary shuttle bus service is provided for guests between the official GRAPH EXPO hotels and McCormick Place.

For more information on making hotel reservations through the official GRAPH EXPO hous-

ing service, or to download a hotel housing form, visit: www.graphexpo.com/HotelTravel.aspx. You'll also find information on discounted air travel on American or United Airlines, the official airline carriers for GRAPH EXPO.

GRAPH EXPO 2012 Show Opening

The Chicago Marathon is taking place the morning of **Sunday, October 7**. To assist with getting show visitors to the convention center, GRAPH EXPO trade show hours on Sunday will be **12:00 noon – 5:00 p.m.** Please allow extra time to travel from airports or downtown to McCormick Place.

NPES Government Affairs Capitol Hill Fly-In In conjunction with Printing Industries of America's PRINT'S VOICE 2012 Washington, D.C., June 5-6, 2012

You are Invited and Needed: All NPES Members are encouraged to participate. NPES Government Affairs Committee Chairman Mike Ring, President, Xeikon America, will lead NPES' public policy advocacy event. 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

All members of the 112th Congress are invited guests to the congressional reception Tuesday evening, June 5, 2012.

Wednesday, June 6, 2012

- **Breakfast Meeting**,* 8:00 a.m., 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

**Co-hosted by NPES and Printing Industries of America*

Invited VIP Speakers & Guests:

- Speaker of the U.S. House of Representatives: Representative John A. Boehner (R-8 OH)
- U.S. Senate Majority Whip: Senator Richard J. Durbin (D-IL)
- Senator Rob Portman (R-OH)
- U.S. House Budget Committee Chairman: Representative Paul D. Ryan (R-1-WI)
- U.S. Postmaster General: Patrick R. Donahoe

Fly-In Participants Will Be Advocating for:

- A Vital and Sustainable U.S. Postal System
- Affordable and Equitable Health Care Reform
- Favorable Capital Investment Tax Policy
- Free, Fair International Trade
- Affordable American Energy
- Responsible Environmental Policy
- Respect for the Value and Integrity of Intellectual Property
- Limited, Effective and Efficient Regulations



Accommodations

Hyatt Regency Washington
on Capitol Hill

400 New Jersey Ave NW
Washington, DC 20001

Room Rate: \$245

Must book by: May 8, 2012

Phone: 202/737-1234

Fax: 202/737-5773

**For more information
or to register contact**

**NPES Government Affairs
Director Mark J. Nuzzaco**

at Phone:

703/264-7235

or E-mail:

mnuzzaco@npes.org

Event Location:

Capitol Hill Club, 300 First Street, SE, Washington, DC 20003 • Phone: 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.

Social Media:

THE NEW TOOLS AND RULES OF BUSINESS ENGAGEMENT

By John Foley, CEO, Grow Socially

One of the biggest 'disruptors' in the marketing world today is social media. Social networks such as Facebook, Twitter, YouTube, and LinkedIn are changing the way people communicate on a personal level and are, likewise, having a dramatic impact upon the business world as well.

Social media is changing and revolutionizing the way brands share information and engage with their prospects and consumers, from generating leads and expanding customer loyalty programs to providing real-time support. And, for companies in the print industry it can be instrumental in growing their businesses.

The statistics around social media adoption are staggering...for example more than 500 million people across the world have a Facebook account! However, before your company plans to jump in and benefit from these new 'tools of engagement,' first you must:

- Learn about the latest social networking tools' *features and solutions* available to discern how they can help your company succeed,
- Discover *which* social networks will best meet your needs,
- Identify *what* types of content you should be posting, and
- Determine how to *measure* the success of it all!

Just as with any new technology, you'll need to plan carefully how to integrate not only the technology, but also its implications and expectations into your corporate and marketing planning agenda. To get started, take an in-depth look at the strategy, culture shifts and tactics needed for your company to succeed with online marketing and social media. Next, you'll need a strategy to create, execute, manage, and measure your social media campaigns to achieve your stated business objectives and goals. Even if you have already-established social media pages, now is the time to take a step back to develop an online marketing plan based on the following considerations:

- What self-promotional activities create new leads for your company?
- Which vertical markets should your company target through online marketing?
- Who on your staff will manage your social media activities and keep everything fresh and appealing?
- How will you enable and motivate your sales team to use social media?
- What are your expectations?
- How will you monetize?

To answer these questions and more, seek out proven strategies, plans and tactics that your company can follow to grow the business despite shifts in the worlds of marketing and communications. Have conversations at the executive level seeking the expertise of those who have gone before you. If you are looking to monetize, best practices observed elsewhere are often helpful in crafting your online efforts to do what matters most—*generate revenue!* Case studies of companies that have successfully adjusted their business model and marketing efforts to utilize online marketing channels are invaluable guides, as are commentary and advice from other industry leaders on 'what and how' you should do now to prepare for the near future in an increasingly digital-centered environment.

Online marketing and social media are here to stay. In my presentation at the upcoming NAPL/NPES Executive Briefings, I will share with attendees key actionable advice and guidance to help them build their company's online marketing and social media strategy. Our discussion will include key statistics, data, and case stories with examples of companies that have used social media effectively—and not so well! If you are looking to grow your business using social media, join us and find not only the inspiration, but the strategies you'll need to get started. ●

REGISTER NOW!

NEW FOR 2012!

NAPL/NPES EXECUTIVE BRIEFINGS

Four Power-Packed Sessions in an Informative, Fast-Moving Program



Carl Henry



John Jay Jacobs



John Foley



Joseph P. Truncale

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

Emerging Print Technologies

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

Joseph P. Truncale, Ph.D., NAPL President and Chief Executive Officer

REGISTRATION: \$195 PER PROGRAM

Multiple Registration Discounts:

- Two from the same company: \$175 per registrant
- Three from the same company: \$150 per registrant

FOR MORE INFORMATION

PHONE: 800/642-6275, OR

E-MAIL: LSHOEMAKER@NAPL.ORG

Senate Delays Postal Reform: Mailing Industry Opposes Postage Rate Increases

Action on bipartisan postal reform legislation was delayed before the spring congressional recess when the U.S. Senate failed to pass a procedural motion to take up consideration of S. 1789, the *21st Century Postal Service Act of 2011*, reflecting pressure for changes to the bill reported by the Senate Homeland Security and Governmental Affairs Committee in September 2011. In response, S. 1789 co-sponsor Senator Joe Lieberman indicated that he is working on a manager's amendment that he believes will assure passage of the bill before mid-May 2012.

S. 1789, co-sponsored by Senators Lieberman (D-CT), Collins (R-ME), Carper (D-DE) and Brown (R-MA) and supported by NPES and its mailing industry allies, would restructure USPS pension and healthcare payments, provide incentives for downsizing the postal workforce, reduce costs of the workers' compensation program for federal civilian and postal employees, require that USPS finances be considered in postal labor arbitration proceedings, impose a two-year moratorium on the possible curtailment of Saturday mail delivery, and allow the Postal Service greater latitude to engage in non-postal services to generate additional revenue.

NPES urges its members to continue to press their senators to support S. 1789, as reported by the Homeland Security and Governmental Affairs Committee, and oppose amendments that would impose greater postage and mailer costs. Your action is needed in order to avoid a shut-down of the USPS, which is still a vital part of the nation's system of communication and commerce. Go to www.npes.org/Programs/GovernmentAffairs/Alerts.aspx to send a communication to your elected U.S. Senators.

For a complete summary of 21st Century postal reform positions see www.npes.org/21c.aspx. For more information contact NPES Government Affairs Director Mark J. Nuzzaco at phone: 703/264-7235 or e-mail: mnuzzaco@npes.org. ●

SAVE THE DATES!

NPES 2012 Annual Conference

November 10-12, 2012

Miramonte Resort • Indian Wells, California



NPES Provides Leadership in Developing New Industry Standards

Product safety is vital to the continuation and success of our industry, and NPES has been at the forefront of industry standards development since the 1980's. These industry-wide, national and international standards help make products not only safe for users, including our members and their customers, but also faster, more efficient, more cost-effective, and as sustainable as possible.

NPES provides leadership in developing national standards under the auspices of two committees accredited by the American National Standards Institute (ANSI):

- The **B65 Committee**—which develops safety standards for printing presses, bindery machines and other printing equipment, and
- The **Committee for Graphic Arts Technology Standards (CGATS)**—which develops standards relating to pallet loading of printed materials, metrology, terminology, plates, process control, electronic transmission of publication ads, digital data exchange, color data definition, design workflow for packaging, and ink and color characterization for packaging.

Additionally, NPES administers the US

TAG (Technical Advisory Group) to ISO Technical Committee 130 (Graphic Technology). Within ISO/TC 130, NPES administers the following five working groups:

- WG2: Prepress Data Exchange
- WG5: Safety and Ergonomics
- JWG7: Colour Management
- JWG9: ISO 12640-5 (Scene SCID)
- WG11: Environmental Impact of Printed Products

NPES encourages members to keep up to date on applicable standards as they are developed, revised and reaffirmed. Current standards are available for purchase from NPES and member companies receive a 10% discount. For more information, visit: www.npes.org/Programs/StandardsWorkroom/PurchaseStandards.aspx.

NPES standards work is open to members having an interest. For more information on the standards activities administered by NPES, visit the NPES Standards Workroom at: www.npes.org/Programs/StandardsWorkroom.aspx, or contact Debbie Orf, Assistant Director, Standards Programs, at phone: 703/264-7200 or e-mail: dorf@npes.org.

NEW STANDARDS:

- ISO 16684-1:2012 *Graphic technology – Extensible metadata platform (XMP) specification – Part 1: Data model, serialization and core properties*
- ANSI/CGATS/IDEAlliance TR015:2011- *Methodology for establishing printing aims based on a shared near-neutral gray-scale*
- ANSI/CGATS/TR016:2012 *Graphic technology – Printing tolerance and conformity assessment*

REVISED STANDARDS:

- ANSI/CGATS.4:2011 (Revises and replaces ANSI/CGATS.4:2006) *Graphic technology – Graphic arts reflection densitometry measurements – Terminology, equations, image elements and procedures*

REAFFIRMED STANDARDS:

- CGATS/ISO 15930-1 *Graphic technology – Prepress digital data exchange – Use of PDF – Part 1: Complete exchange using CMYK data (PPF/X-1 and PDF/X-1a)*
- CGATS.9 *Graphic technology - Graphic arts transmission densitometry measurements - Terminology, equations, image elements and procedures*

WITHDRAWN STANDARDS:

- CGATS/ISO 15930-5 *Graphic technology – Prepress digital data exchange using PDF – Part 5: Partial exchange of printing data using PDF 1.4 (PDF/X-2)*

Gauging the Impact of Electronic Technologies on Print

As new technologies and innovations continue to impact communication tools and methods, one thing is very clear—the role of print is irrevocably changing. The tactile pleasures of paper—whether a book, newspaper or magazine—are diminishing, and in some cases gone forever. For those printed pages that offered beautiful output quality at the lowest cost per page, but were only printed in larger volumes than actually required, there is no happy ending.

Are electronic technologies to blame for the shift of content online and loss of page volume? Eight months, hundreds of hours of interviews, and weeks of in-depth analysis confirm that electronic technologies are indeed an enabler, but not the *root* cause of the decline in offset printed pages. These insights and more come from the recently released 2011 PRIMIR study, “*Impact of Electronic Technologies on Print*,” which examines 12 print applications ranging from annual reports and books to transactional printing (Figure 1). In the new study, each application is rated for the impact of electronic technologies on print along with the business reasons behind any changes that have occurred. The report identifies six core reasons driving decline in page volumes, including the impacts of:

1. Business model changes enabled by electronic technologies;
2. New electronic advertising distribution channels;
3. The recession;
4. Regulatory changes;
5. New electronic content distribution channels; and,
6. Electronic output display technologies.

For the next three years no great adjustments are foreseen, however major changes are expected over the following 20 years. Since a five percent annual decline in page volumes leads to an almost 50 percent reduction in print over 10 years, all firms in the print value chain will have to alter their business infrastructure to scale down for less demand. They will also need to become more nimble and flexible to respond to rapid fluctuations in demand.

While the study uncovered the fundamental reasons of change and the reasons for impact on print volumes, it did not discover any solutions to those challenges. However, there has been much said about variable data

In other words, it’s an important enabler, but few are willing to pay for its true value.

Ironically it may well be that the lack of relative success in converting offset to digital pages has insulated and protected the value

FIGURE 1: Relative Impact of Electronic Technologies: 12 Applications Compared, North America, 2009-2014

Millions of Pages			
	PAGE VOLUMES PRINTED, ANALOG & DIGITAL, CUMULATIVE 2009-2014	PAGE VOLUME DECLINE CUMULATIVE 2009-2014	PERCENT DECLINE FOR RESPECTIVE APPLICATION
Annual Reports	73,226	-11,989	-16%
Books	2,544,569	-78,698	-3%
Catalogs	5,695,911	-579,545	-10%
Direct Mail	2,793,095	-86,718	-3%
Directories	2,750,700	-200,738	-7%
Freestanding Inserts/Coupons	135,549	-11,603	-9%
Journals	19,717	-1,746	-9%
Magazines	6,151,097	-606,548	-10%
Marketing Collateral	5,480,845	-448,237	-8%
Newspaper	25,559,824	-1,864,570	-7%
Prospectuses	98,813	-60,026	-61%
Transaction	758,760	-35,989	-5%
TOTAL	52,062,106	-3,986,406	

Source: PRIMIR *Impact of Electronic Technologies on Print Study 2011*, by I.T. Strategies, Inc.

printing, QR codes, key search words, packaging application opportunities, and even thoughts about printing RFID electronics directly onto paper.

Each of these specialties has value but they are not opportunities that will reverse any industry rightsizing for printing equipment and supplies manufacturers. Opportunities exist for individual companies and leaders, but not the entire industry. Basically the dilemma is that those who create content can easily change tools and move from printing tools to electronic content tools, however, printing equipment and supplies manufacturers cannot easily make new tools that allow for electronic communication needs.

Some would argue that software is an answer; they are correct in the sense that software can support tremendous value creation. Yet, software used for creating and managing print accounts is well below three percent of all printing equipment and supplies revenues.

of digital print. The offset pages being lost have been mostly of low value to the recipients. The pages that remain only become more valuable, especially those that add something above and beyond beautiful output quality.

We should point out that the printing industry is not under immediate threat of collapse—it remains an enormous business that will be sustained for years to come, though with fewer presses, fewer tons of paper, fewer pounds of ink, and ultimately fewer printers and manufacturers who cater to them. Opportunities exist for those willing to work hard to find them; and they will take time to nurture.

Electronic technologies extend the reach of communication by connecting the loop and making it interactive. This is perhaps the single most important function brought about by electronic technologies. Historically print stopped once the user received it; print

Continued on page 7

Continued from page 6

was the final product. Electronic content is never completed. Electronic technologies provide infinite digital information.

Many of the tools required to generate electronic content are identical to the tools required to create printed content. The technologies available to distribute content electronically have been in place, in many cases, for years. What is different today, in contrast to five years ago, is the information 'super highway' we now access (juxtaposed with what could previously have been described as single-lane roads). Most recently, the Cloud is the single most important enabler of the further growth of electronic communication technologies. It pulls together all the other disciplines required to communicate and closes the connection between print and input capture, making

communication bi-directional.

The old business model of buying larger quantities than needed to get the lowest cost of print per page is broken. Electronic technologies are not only enabling more timely and efficient communication, but they have also exposed the inherent inefficiencies of over-ordering and inventorying large quantities of print that don't have intrinsic and immediate value. In particular, this affects periodicals and marketing collateral.

Today, and in the future, the benefits of electronic communication technologies outweigh, and will continue to outweigh, the disadvantages. The Cloud will further drive content that has a time value toward electronic communication. The PRIMIR study concludes that print will co-exist where instant availability is not the most important factor. ●

PRIMIR Summer Meeting June 20-22, 2012

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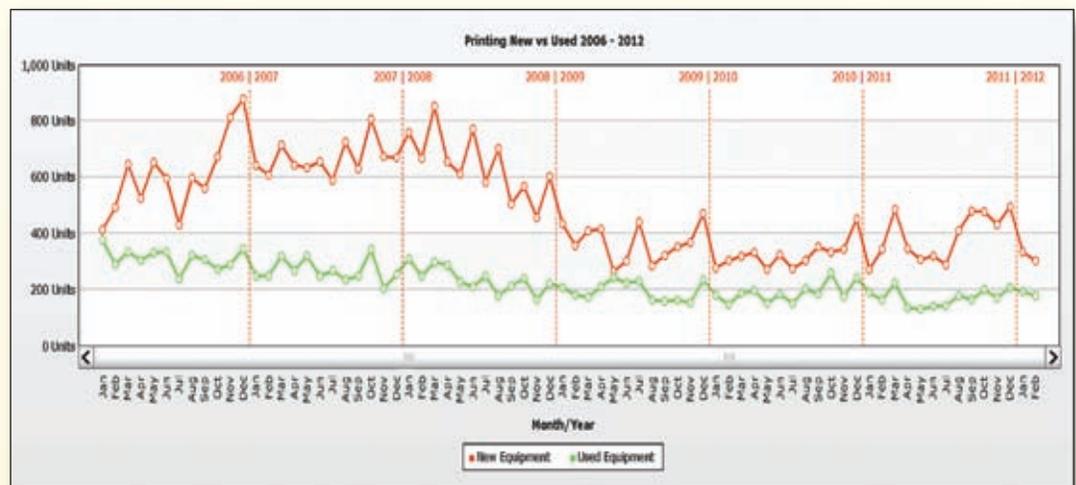
Market Intelligence News: UCC Filing Update

The chart compiled from UCC data provided herein by Equipment Data Associates (EDA), shows up-to-date UCC (see definition below chart) activity for all printing equipment. Although UCC filings are a combination of new equipment sales, used equipment sales and re-financings of existing placements, they are still a strong indicator of market activity. February 2012 new equipment filings dropped for the second consecutive month to 303 units. Despite this drop, early 2012 levels are still slightly ahead of 2011 levels, but considerably weaker than the end of 2011. Used equipment filings are now slightly ahead of comparable 2011 levels. This information is extracted directly from EDA's comprehensive database of nearly 30,000 records for purchasers of printing equipment.

For more information, or to join the free NPES Market Data program, contact NPES Assistant Director, Rekha

Ratnam, at phone: 703/264-7200 or e-mail: rratnam@npes.org. For specific information about the market intelligence services offered by EDA, contact Mauricio Jurin at phone: 704/845-1099 or e-mail: mjurin@edadata.com. ●

Printing Equipment UCC Filings: 2006–2012



A Uniform Commercial Code Form 1 (UCC-1) filing is a financing statement required by law to be filed with the state to show that one party (usually a lender) has a security interest in another party's (usually a borrower's) personal property, and most frequently relates to the commercial financing of capital equipment through a lending institution. UCC data is filed every day throughout the U.S. Each UCC data filing statement has three components: the borrower, the lender, and what the borrower purchased, including make, model and serial number. Once the data is filed, EDA's more than 50 employees manually review each filing to identify and correctly classify the transactions of printing equipment. What results is a robust database that offers subscribers continually updated information on exactly who is buying or leasing what pieces of equipment.

NPES CALENDAR

May 2012

drupa 2012

NPES Member Booth

May 3-16 • Düsseldorf, Germany

TC130/WG 5

May 8-9 • Düsseldorf, Germany

NAPL/NPES Executive Briefing

May 23 • East Rutherford, New Jersey

NAPL/NPES Executive Briefing

May 24 • Boston, Massachusetts

June 2012

Capitol Hill Fly-In

June 5-6 • Washington, D.C.

NAPL/NPES Executive Briefing

June 11 • Chicago, Illinois

ICC Meeting

June 11-13 • Tokyo, Japan

NAPL/NPES Executive Briefing

June 12 • Dayton, Ohio

ICC Symposium

June 15 • Shanghai, China

PRIMIR 2012 Summer Meeting

June 20-22 • Rockville, Maryland

August 2012

CGATS/USTAG

August 21-22 • San Luis Obispo, California

September 2012

NPES Trade Mission to Colombia and Brazil

September 15-23

TC130 Working Groups and Plenary

September 30 - October 6 • Chicago, Illinois

October 2012

GRAPH EXPO

October 7-10 • Chicago, Illinois

November 2012

NPES 2012 Annual Conference

November 10-12 • Indian Wells, California

Did You Know?

Each percentage point of paper recovery represents roughly 800,000 tons of fiber, enough to fill more than 7,500 railroad cars.

—Institute of Scrap Recycling Industries

THE NPES ADVANTAGE

NPES Member Directory: Open for Business 24/7

NPES is the only U.S. trade association that exclusively represents the more than 400 companies that manufacture or distribute equipment, systems, software and supplies for the printing, publishing and package printing/converting industries. The online *NPES Membership Directory* is an invaluable product locator and trusted resource for

industry buyers, vendors and prospective customers.

For NPES Member companies, *NPES Membership Directory* listings are a free membership benefit valued at \$395. Each member listing is a concise profile that contains company name, location and link to their Web site for complete information. PRIMIR members are additionally identified

Free Member Website Listing - \$395 value

Based on comparable commercial online directory value.

by the PRIMIR logo.

The online *NPES Membership Directory* located at: www.npes.org/Members/MemberDirectory.aspx is a powerful NPES member advantage—and instant connection to motivated industry buyers and prospects. ●

NPES Website Launches New Blog

Discuss, Debate, Update E-Technologies' Impact on Print

In today's hyper-connected multimedia environment, the role of print is irrevocably changing. With a burgeoning new array of new communication formats and tools in the



Marco Boer

media mix, marketers are increasingly strategizing their customer communications with maximizing customer touch points and minimizing cost in mind. Considering the shift of content and loss of page volume in recent years, are electronic technologies solely to blame?

Based on the recently released PRIMIR study "*Impact of Electronic Technologies on Print*," which ex-

amines 12 print applications—from the *rate* of impact of e-technologies on print to the *business model* reasons behind the changes—indeed electronic technologies are an enabler, but not the root cause of the decline in offset printed pages.

According to the study's principal researcher, Marco Boer, Vice President, I.T. Strategies, "Contrary to popular belief, mostly fueled by media saturation, e-books, iPads and other similar devices aren't the root cause for the decline in page volume within the various print applications. Rather, the true major change-agent is a shift in business models."

The new monthly blog on www.npes.org/NewsEvents/Blogs.aspx is an opportunity for you to join in the conversation with Boer and other industry experts and peers to further examine the impacts of e-technologies on print—and what

they will mean to your business in the months and years ahead. ●

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