

DELIVER at PRINT 13

USPS SPONSORS NEW MAILING & FULFILLMENT CENTER



DELIVER, the new USPS-sponsored mailing and fulfillment center, being unveiled at PRINT 13, will provide mailing and fulfillment professionals unprecedented access to the world's largest research, market data, best practices and solutions venue.

When PRINT 13 opens this fall, September 8-12 in Chicago's McCormick Place, a historic new twist on the ever-popular Mailing & Fulfillment Center will be unveiled. *Still* the largest mailing exhibition in the world, this expanding show floor section will debut as the newly reimagined and re-branded "DELIVER" pavilion.

Most importantly, here in DELIVER—now sponsored by the United States Postal Service (USPS), PRINT 13 buyer-attendees will gain unprecedented access to all of the research, market data, best practices and solutions for bridging print with marketing to achieve stellar business results.

Because 40% of everything printed is mailed, along with Mailing & Fulfillment professionals that flock here each year, now Commercial Printers; Corporate, Education and Government In-Plant Centers; Quick/Instant Printers; and Transactional Printers will join these buyer-attendees in DELIVER, eager to see the variety of manufacturers' and suppliers' demonstrations

and to gain new "nuggets" to maximize the ROI of direct mail and integrated media programs.

Adding to the information and resources available here, new attendee-drawing features in DELIVER will include the:

- **DELIVER ROI Theater**
Produced by: The United States Postal Service (USPS)
Featuring FREE 30-minute sessions throughout the show by USPS executives and innovative cross-media marketing pros—the absolute authorities on DELIVERY; and,
- **"Ask the Mailing Expert"**
Sponsored by: Association of Marketing Service Providers (AMSP)
Providing FREE expert advice by the pros from the ultimate association in this space—AMSP!

For more information about PRINT 13, visit: www.print2013.com. ■

DELIVER The *NEW* Mailing & Fulfillment Center at

PRINT 13

FEATURED SPONSORS

Pavilion Sponsor

**The United States
Postal Service**

Association Sponsor

**Association of Marketing
Service Providers (AMSP),
formerly MFSA**

GASC Sponsors

**NAPL, NPES &
Printing Industries of America**

FEATURED SUPPLIERS

- Pitney Bowes
- W+D Machinery
- Bell & Howell
- Bowe Systec • Kern
- Longford Equipment
- Neopost • VideoJet
- Buskro • Kirk-Rudy
- EAM Mosca • Lake Image
- Eagle Systems
- United Business Mail
- Anchor Software • Satori
- Thompson Direct • Sefas
- United Business Mail

CHAIRMAN'S PERSPECTIVE



Chris Payne, NPES Chairman

Trade Shows: Expansion into Knowledge Sharing

There is a lot of chatter in the vendor community about IPEX and the future of other trade shows, causing me to reflect back on the significant changes that we have experienced as an industry over the past 25+ years. Now, as we converse with our customers every day, we've come a long way from the trade show model that was based fundamentally on selling and as a networking platform, to where the real

need is today—industry-wide knowledge sharing.

When I first started working for a pre-press supplier in the 1980s, trade shows at that time were super important. They were one of the few places to get information—the alternative was from the trunk of a salesperson's car, full of boxes of brochures. Back then, trade events were also the only opportunity to train our salespeople, and meet with customers to compare solutions and demonstrate our latest technology. During the show we issued press releases, handed out samples and distributed thousands of printed product brochures. There were no cell phones or PCs. We used overhead projectors and foils to give presentations, and if a customer wanted more information, it had to be sent via postal mail.

Since then, both our tools for communicating and our industry's environment have dramatically changed. In today's digital world, customers have immediate access to information that's up-to-date and personalized to their business needs. Sales teams no longer carry collateral; rather they send electronic requests to fulfill a specific customer's needs with a printed brochure/data sheet. Today our salespeople have more information on their iPads, smart phones and PCs than we could ever take to a trade show in the past. Customers are increasingly using online tools to conduct research, receive training, and solve their daily business challenges. They find value in smaller group sessions and 1:1 consulting. They are looking to trade associations and users' groups to connect with industry peers, participate in hands-on labs, hold roundtable discussions and attend classroom courses.

Although the world has become more connected and with many new ways to communicate, what will never change is the need to meet with customers and help solve their individual problems. Those meetings are more important today than ever before with our industry exponentially more complex.

For trade shows to remain relevant and a viable forum in this hyper-connected world, they must morph to meet the changing needs of both attendees and exhibitors. PRINT and GRAPH EXPO are prime examples leading this change as co-located events at these shows continue to grow in depth, diversity and numbers.

E-TECH BLOG

"Green" Is In the Eye of the Beholder

In his e-technology blog this month, *"Is Print the True Green Technology?"* Marco Boer, Vice President I.T. Strategies, explores how "greenness" is often defined by our perception. Print is often seen as a non-



Marco Boer

green technology for two reasons: because of its use of natural resources in the manufacturing process, and a potential waste of resources at the life cycle end, whereas electronic content and display are seen as only using energy when consumed. Yet electronic technologies can be deceiving in their hidden usage of energy through the servers that convey and store the content.

While print can for the most part be recycled, electronic devices need frequent replacement, are difficult to dispose of, and require that content be stored in perpetuity.

Read the full blog at www.npes.org/blog and add your perspective to the discussion. ■

As vendors we need to find ways to maximize this "new" trade show experience by providing innovative ways to educate our customers that reveal new and emerging opportunities for them in today's increasingly complex business environment. And, as trade shows continue to provide unequalled face-to-face access to prospective new customers, we must find innovative ways to ensure a strong presence among our competitors. And as the marketing landscape shifts, vendors will look at trade shows not necessarily in terms of floor space and equipment, but as essential knowledge-sharing events.

Trade events remain indispensable forums for bringing together customers and prospects that come with buying power for meaningful discussions about their individual business needs. Suppliers like Kodak are working to explore new ways to reinvent and expand those vital customer engagements at trade events. ■

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The U.S. Postal Service Steps Up Its Mobile Game

In 2013 the U.S. Postal Service (USPS) will continue promotional initiatives designed both to entice marketers to integrate mobile technologies into their direct mail pieces and to increase consumer awareness to drive up-take. "The whole industry is evolving and we're trying to do our part to push innovation," says Gary Reblin, the agency's VP of domestic products.

In May 2012 the USPS incented marketers with a postage discount if they included 2D barcodes on their direct mail pieces and satisfied certain criteria, which included information alongside the code telling consumers why they should scan it, a connection to a mobile-optimized site, and a connection to either a commerce-enabled or personalized site.

Reblin says that 20% of Standard Mail users participated in the promotion last summer, and 18 to 20% of direct mail marketing pieces had QR codes even after the USPS's promotion ended. For Reblin, this validates the project. "Our true measurement is: Are [marketers] continuing to use it?" Reblin says. In November the USPS came out with another mobile promotion, offering a postage discount for mailers with barcodes that linked to a mobile-optimized shopping site.

The USPS's 2013 promotional initiatives will go beyond mobile barcodes—such as near-

field communications (NFC) and augmented reality (AR).

The first promotion, beginning March 1, will offer postage discounts for mailers that integrate hard-copy coupons that can be redeemed via mobile technologies—for instance, scanning and storing a coupon with a mobile device. "Mobile and iPads can really enhance direct mail and couponing in general," Reblin says.

A second promotion, beginning August 1, will provide postage discounts for enterprise customers that use "cutting-edged innovations" in their mail campaigns, including NFC—which enables communication and data exchanges based on proximity—and AR, which amplifies images with interactive menus, videos, and graphics.

"Mobile barcodes are just the beginning," Reblin says. He's most excited about the possibilities around NFC, especially as in-store retailers implement credit card readers with NFC capabilities and tech companies like Google introduce mobile wallets. "When you go to the store and tap [your mobile device] on the NFC reader," says Reblin, "not only is a payment made on the credit card you have, the coupon is automatically deducted because it's linked in the mobile wallet." ■



Gary Reblin

Article by Ryan Joe, Senior Editor, Direct Marketing News, that appeared in the December 2012 issue reprinted with permission; www.dmnnews.com

Expand Your Horizons With NPES 2013 Trade Mission to China LOOK EAST FOR BUSINESS OPPORTUNITIES

China has grown to be one of the world's most dynamic print markets, comprised of 100,000 printing enterprises with nearly three million employees.

The Chinese print industry has rebounded from the global financial recession, is healthy, and has shown strong development since 2009. As the world's second-largest economy, China's rising incomes and urbanization continue to boost consumption of printing and packaging products, putting high demand on equipment imports.

This trend is expected to continue for at least ten years and offers new opportunities for the U.S. suppliers and manufacturers of printing equipment and technologies.

Why a Trade Mission?

The trade mission, packed with first-hand information and on-the-ground, in-depth experiences, will be a great help for those seeking new market opportunities to expand their business to China.

- Market Briefings
- Printer and Equipment Manufacturing Facility Visits
- Roundtable Meetings
- Attendance and NPES booth participation at China Print 2013
- Individual Business Meetings with Prospective Customers and Distributors
- Cultural Activities

Exhibit at China Print 2013

NPES members can take advantage of booking individual booth space at the 2013 China Print show, or join the NPES booth for a very low fee. ■

NPES China Business Trade Mission

May 13-23, 2013

China Print 2013

May 14-18, 2013

China International Exhibition Center (CIEC), Beijing, China

Sign Up Online for Trade Mission

www.npes.org/News-and-Events/Calendar-of-Events/Event-Details.aspx?EventID=1437

Deadline

April 1, 2013

For More Information

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There is no doubt that the role of print within the media mix will continue to evolve, becoming more targeted, relevant, personalized and timely.

Chris Lien is vice president of software marketing at Bell and Howell. He has been involved in the mailing industry for over 20 years, holding board of director positions with numerous associations and is currently the vice-chair of the Postmaster General's Mailers Technical Advisory Committee (MTAC). Chris has been with Bell and Howell since 2007, and was formerly president of their BCC Software team.

Since the "Great Recession," how have your customers' needs changed, and your organization adapted to respond to these challenges?

The "Great Recession" was tangibly felt in the mailing industry where we saw the mail volume drop rapidly and precipitously to the point where the postal service is now facing cash flow issues. They are at their debt limit waiting patiently, as are their partners including Bell and Howell and customers, to see if Congress is going to do anything.

We've seen customers leave the industry—they just can't make enough money—often because our customer's customer made a decision to reduce or eliminate their direct mail strategies. We also saw and still see consolidation. I am concerned also about attrition as we lose people in the postal service who have been involved in this industry a long time, who have that knowledge base.

Additionally, we're seeing a transformation—and that's perhaps the most exciting part. Some of our customers have recognized the role of the mailing service provider is changing and they are branching into marketing services. Address quality is vital for these services, yet ensuring that the address on a mail piece is correct can be challenging; what I call the 3Cs: complete, correct, current [address]. As a full-service licensee, Bell and Howell licenses change of address data directly from the postal service and our customers, through our software in a secured portal, are able to cleanse and update their addresses in real time.

In today's cross-media, multichannel market-

One on One

CHRIS LIEN

place the role of print is changing; what new opportunities do you see on the horizon for your company?

The market...it's shrunk, but as it transforms and we look into additional services to find new ways to message, mixed channel or multichannel marketing is critical. Our customers need to be able to tie together multiple messaging techniques in a very strategic way: sending, for example, direct mail in conjunction with a message to a mobile device, and possibly an email as well.

Continuity of the message communication is critical and to do that we need to be able to match data; through a traditional mailing list, a cell phone record, or through data in an email system. Connecting those threads together is part of the expanded data services that Bell and Howell offers its customers.

Tying together the mail piece, the mobile message, and the email message needs to be done strategically, so that as the scheduled mail piece is out for delivery by a carrier, a message can be sent to a mobile device informing the recipient to scan the QR code in the direct mail piece that is waiting at home in the mail with an offer that is unique to them. Now, that's a very powerful message.

Our customers are doing that today. Bell and Howell provides the mobile technology apps to implement the mobile messaging. We're also leveraging that foundational piece: the direct mail. And timing is everything. We employ the postal service's intelligent mail barcode (IMb) to track those pieces and our customers can see through our track and trace service exactly where their pieces are in the delivery stream.

What technology trends have had the greatest impact on your market?

Volume is no longer the deciding factor...we have some customers who are doing a couple hundred piece mailing and also certainly some doing hundreds of thousands. I'm seeing that the volume and the messaging and the ways to leverage them are changing all over the place. Those who are astute enough to begin applying the data, timing and visibility are going to get the biggest bang.

Today only the *basic* intelligent mail barcode, which doesn't have to have the full built-in tracking infrastructure, is required; however, Bell and Howell urges customers not to wait until 2014 when the postal service will, if it sticks to its guns, require the *full-service* intelligent mail barcode. If customers do not take advantage of it now, because our software, services, and support are already in place, they're missing out on the opportunity to be on the leading edge, the leadership position of leveraging a direct mail piece as part of a mixed-channel message system.



Chris Lien

What do you see for the future of the industry over the next few years?

The postal service's digital solutions area will allow it to offer more solutions to its partners and customers. Initially, USPS will need to provide visibility into its mail processing stream, at least for its partners, like Bell and Howell.

To my mind, the value of the intelligent mail barcode really is not about the barcode per se, rather it's about "intelligent mail." This gives us three pillars of opportunity: accountability (I know my mail piece is on its way); visibility (I can see where it is); and, predictability (when is it going to arrive?). Those three pillars are essential with any digital solution.

Then, what is the postal service going to be able to do under the law? We must wait to see what it's going to do as it expands its monopoly and its growth strategies. My prediction is that the postal service will continue to grow digital solutions and the visibility of intelligent mail; and really push quickly to get back into the package game—a market they really just gave to UPS and FedEx. USPS will also need to work with its partners so that we're helping to leverage the changes in economy. They can't just sit back and let the postal service die.

Finally, the overall financial restraints on the postal service: They need to be able to move and move quickly in building out opportunities for growth, but if they're going to be hampered by law and postal accountability enhancement act issues, that's going to be very, very difficult. ■



Chief among ATRA 2012 capital investment tax incentives is the one-year extension of 50% Bonus Depreciation through December 31, 2013, which would have expired at the end of 2012.

Last-Minute Fiscal Cliff Deal Agreed

CONTINUES INCENTIVES FOR CAPITAL INVESTMENT IN 2013, RETROACTIVE FOR 2012

The American Taxpayer Relief Act of 2012 (ATRA 2012), signed into law January 2, 2013, avoided “fiscal cliff” automatic tax increases for most Americans and improved capital investment incentives for 2013, as well as retroactively for 2012, a very favorable outcome considering the alternatives. Job-producing expensing and bonus depreciation continue to find bi-partisan support.

Regrettably, ATRA 2012 missed what former Clinton budget director Erskine Bowles called the “magic moment” to also enact spending cuts, along with tax and entitlement reforms necessary to truly control rising federal debt, as reported by the Committee for a Responsible Federal Budget (CRFB).

While ATRA 2012 has numerous facets, the following is a brief summary of the principal provisions affecting capital investment, a top priority for NPES members and their customers.

Bonus Depreciation

Chief among ATRA 2012 capital investment tax incentives is the one-year extension of 50% Bonus Depreciation through December 31, 2013, which would have expired at the end of 2012.

• **IRC Section 168(k) 50% Bonus Depreciation** (enacted in 2009 as part of the *American Recovery and Reinvestment Tax Act of 2009* and extended in *The Small Business Jobs and Credit Act of 2010*) continues for equipment placed-in-service before January 1, 2014.

Section 179 Expensing

Another important ATRA 2012 provision extended and increased IRC Section 179 Expensing.

• **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 and 2013. But for ATRA 2012, Section 179 Expensing would have been reduced to an inflation adjusted \$139,000/year, with inflation adjusted \$560,000 phase-out in 2012, and only \$25,000/year with a \$200,000 phase-out in 2013 and thereafter.

- 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.
- The expensing cap and phase-out amounts will revert to \$25,000 and \$200,000 respectively in 2014.
- Unlike bonus depreciation, expensing applies to both new and used qualifying property, and is subject to annual dollar, investment and taxable income limits.

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. Nuzzaco at phone: 703/264-7235 or e-mail: mnuzzaco@npes.org. ■



Mark Your Calendars!

June 4-5, 2013
Washington, D.C.

NPES AND PRINTING INDUSTRIES OF AMERICA ANNOUNCE JOINT CAPITOL HILL FLY-IN: PRINT'S VOICE 2013

SCHEDULE AND ACTIVITIES

Tuesday, June 4, 2013

- Welcome Luncheon, 12:00 noon, Capitol Hill Club
- NPES Government Affairs priorities issues briefings by Washington, DC-based policy experts
- Congressional Reception and Dinner, Capitol Hill Club.

Wednesday, June 5, 2013

- 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. Phone: 202/484-4590.

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

*All NPES and Printing Industries of America Members
Welcome and Encouraged to Participate.*

SPECIAL REPORT

A “Perfect Storm” for Press Manufacturers?

Shrinking page volumes caused by electronic technologies are the “perfect storm” for offset press manufacturers. Demand for “instant” content is eroding the old business models, especially those that were dependent upon storing large inventories of print. Add to this an economic recession, and now

slope of a life cycle. Its potential customer base is consolidating and shrinking, and a used equipment market and knowledgeable cadre of maintenance personnel are keeping the installed base alive longer than anticipated. However, not all is lost for press manufacturers. As the financially weaker print shops

disappear, the remaining print shops, in theory, should become stronger. Those stronger print shops will be in a race to establish the most efficient and the highest volume businesses. To capture the highest volumes, they will need to have the lowest cost, most flexible, and most automated equipment.

Opportunity for Press Manufacturers

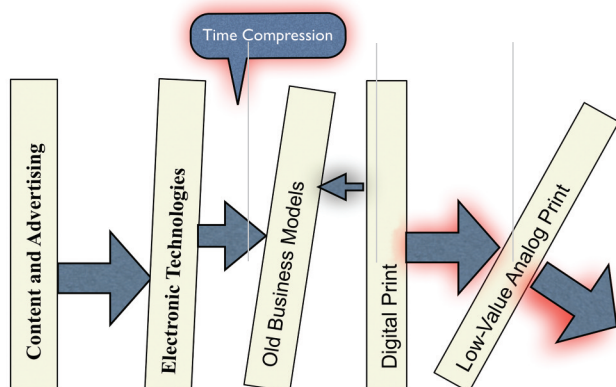
The opportunity for press manufacturers lies in addressing the needs of this upcoming, financially stronger base of

As expressed in the NPES Strategic Plan, it is vital that NPES members understand the impacts of electronic technologies on print to adapt their companies for continued success in today’s “new world” of print. Responding to this need, *NPES News* features this series of special reports based on the 2011 PRIMIR *Impact of Electronic Technologies on Print* study by I.T. Strategies, Inc. Each monthly report by I.T. Strategies’ President and lead researcher on this study, Marco Boer, will examine the variety and timeline for these impacts by key industry segment.



Marco Boer

Figure 1: Content and Advertising Business Model Pressures Are Root Cause of Decline of Print



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

the inventory carrying costs are no longer a part of the cost of doing business, but are exposed as a potentially greater cost than the actual cost of print itself. This is furthering opportunities for digital printing which, in turn, is accelerating the decline of what some call “low-value” offset pages—those pages sitting in inventory of which the content frequently became obsolete before usage. (See Figure 1)

The implication for conventional press manufacturers is not good, and is likely to get worse as the compounding effect of 4-5% annual decline in offset pages (see Figure 2) translates into a 25% erosion of the market need for printed pages by 2016. Not only are existing offset presses in the base lasting longer because their utilization is lower, but additionally fewer print shops are able to invest in new modern offset presses that could mitigate and solve some of the “instant” print need issues.

The press industry is in the classic downward

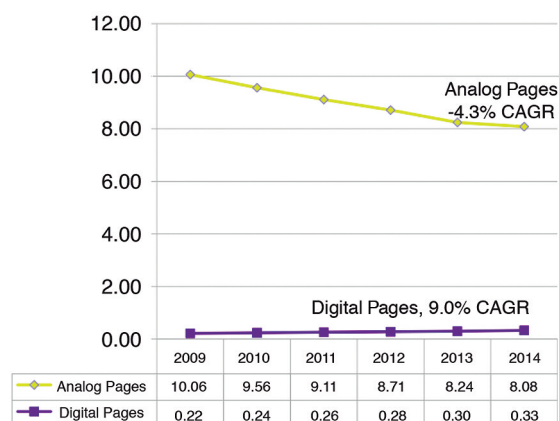
remaining print shops. This means more productive, more automated presses—presses that are up to 80” wide, presses that feature fully automated prepress and plate loading, presses that can automatically duplex print, presses that offer in-line varnish and a wide range of finishing options. Those presses will be expensive, more than others previously offered by the manufacturers. Fewer units will be sold than previously, but the top line revenues and profit margins will be attractive.

The application

focus of those presses will have to be on marketing collateral and direct mail—applications that often require more frequent paper changes than long-run periodical and publishing applications. Periodicals and publishing have been, and will continue to be more severely impacted by electronic technologies. (See Figure 3)

Press manufacturers’ newfound focus on

Figure 2: Trillions of Letter-Size, Simplex Production Pages, North America

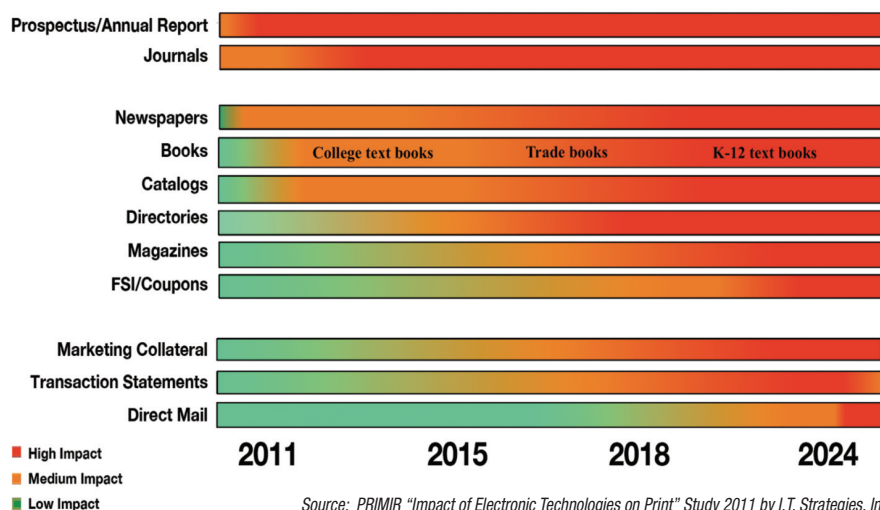


Source: PRIMIR “Impact of Electronic Technologies on Print” Study 2011 by I.T. Strategies, Inc.



Some manufacturers are betting on a magic bullet in the form of disruptive productive inkjet technology which is expected to be under development until drupa 2016.

Figure 3: Impact of Electronic Technologies on Print Volumes: A Comparative Look North America, 2011-2024



marketing collateral and direct mail applications, in combination with advanced nesting software, will open up web-to-print opportunities for their customers. Web-to-print business infrastructure will be critical to driving up print volumes for the remaining financially strong print shops, since it expands business from a regional to a broader national and even international base of customers.

Threats to Press Manufacturers

The threats to press manufacturers from electronic technology alternatives will get stronger in years ahead as at least 25% of page volumes disappear. Press manufacturers must "right-size," keeping two steps in advance of the industry's print volume declines in order to remain profitable. Simultaneously they must invest their smaller R&D budgets in the creation of more automated presses to entice print shop customers to buy new equipment.

How Do NPES Press Manufacturers Respond?

Press manufacturer members are very cognizant of the looming challenges. Demand for presses from emerging markets is mitigating the decline in demand somewhat in the Western markets, but ultimately overall demand for presses will continue to decline. To fill the gaps during the transition towards smaller and smarter press manufacturers, one

opportunity might be to leverage distribution and customer access/trust to help those customers move further into digital printing.

Some press manufacturers are now distributing and reselling other branded light production and wide format graphics printers, and others are offering integration of inkjet technology on their core press transport technologies. The challenge to distributing other brands' products is not only a margin balance (in other words, is there enough money in it to keep everyone happy in a partnership), but also the need to retrain and restructure the compensation incentives for the existing press salespeople. Typically digital production equipment that is resold is priced at a fraction of the cost of an offset press, which makes the commission less enticing to most salespeople. Now they have to sell multiple units of a technology that they've long touted as "irrelevant."

Some manufacturers are betting on a *magic bullet* in the form of disruptive productive inkjet technology, which is expected to be under development until drupa 2016. The challenge will be to fund the R&D that is required to bring this disruptive inkjet technology to market. Recent R&D figures in inkjet development investments range between \$100 million and \$800 million. While the press manufacturers intend to integrate rather than develop the core inkjet technology, the funding required to aid the technology developer to reach commercialization

will have to come from somewhere.

In the meantime, until press manufacturers are able to generate meaningful revenue from digital printing equipment, advanced offset press sales must be the answer.

Conclusion

Printed page volumes are in irrevocable decline. Electronic technologies are freeing content, allowing more rapid dissemination than ever before. Print won't become obsolete, but the low-value pages previously created to attain the lowest cost per page and then stored in inventory until they become obsolete are no longer tolerable in new business models. At the same time, electronic technologies are enabling just in time, short run printing on offset presses to print very short runs, thereby closing the gap between digital and analog production printing.

The opportunity for press manufacturers is to automate press technology and cater to the remaining financially stronger and generally larger print shops. Unit manufacturing and sales may be lower, but the value of these automated next generation presses should enable press manufacturers to stabilize top line revenues—more so than the declining pages volumes might indicate. ■

SAVE THE DATE!



PRIMIR 2013 SPRING MEETING

April 8-10, 2013

The Shores, Daytona Beach, Florida

For more information visit:
www.primir.org



CALENDAR

February 2013

NPES Booth at PRINTPACK 2013/
Trade Mission to India/
Print Business Outlook Conference 2013
February 23-28 • New Delhi, India

April 2013

PRIMIR Spring Meeting
April 8-10 • Daytona Beach, Florida

CGATS/USTAG Meetings

April 16-19 • Irving, Texas

ISO TC 130 WG 5 Meeting

April 24-26 • Atlanta, Georgia

ICC/FDA Medical Imaging Color Conference

April 29-30 • White Oak, Maryland

May 2013

NPES Booth at China Print 2013/
Trade Mission to China

May 11-18 • Beijing, China

TC 130 Working Groups Meetings

May 19-24 • Shenzhen, China

NPES Booth at Expográfica 2013

May 22-25 • Guadalajara, Mexico

June 2013

NPES/Printing Industries of America

Capitol Hill Fly-In: *Print's Voice 2013*

June 4-5 • Washington, D.C.

ICC Meetings

June 10-12 • Seligenstadt, Germany

August 2013

CGATS/USTAG Meetings

August 13-16 • Clemson, South Carolina

DID YOU KNOW?

Of the wood extracted from the world's forests, 53% is used for energy production, 28% is used by lumber mills and only 11% is used directly by the paper industry.

—International Paper, Down to Earth Series,
Is it Worth Printing?/Choose Print

66

This "quick take" visual showcase will bring to the attention of NPES members, and other website visitors, informative brief updates on key programs and more.

Just a Click Away: New Video Gallery Delivers Expert Insight

NOW SHOWING: HIGHLIGHTS OF CURRENT PRIMIR RESEARCH

Visitors to www.npes.org will find our newest feature—the Video Gallery—under the home page "Industry Resources" navigation tab. This "quick take" visual showcase will bring to the attention of NPES members, and other website visitors, informative brief updates on key programs, pre-event previews, post-event highlights, and more.

Within content categories for "NPES" and "PRIMIR," the Video Gallery now hosts a variety of recent selections, including excerpts from PRIMIR 2012 Winter Meeting presentations. Watch excerpts from the following presentations in the NPES website Video Gallery at: www.npes.org/IndustryResources/VideoGallery.aspx

- John Zarwan, President and CEO, J Zarwan Partners, providing meeting attendees with an overview of findings from a just-concluded study for NPES and PRIMIR entitled, *"Defining and Understanding Communications Platforms Trends and Implications to the Print Value Chain."* The study examines all communication platforms, both qualitatively and quantitatively. Dr. Zarwan's presentation also provided insights from brand owners, along with where the control points are for making media mix decisions.

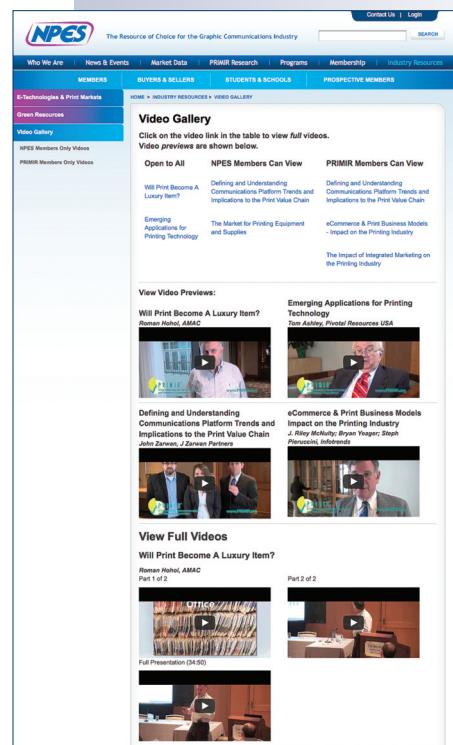
- PRIMIR member Roman Hohol, Director, Marketing Practice Area, AMEC, participating in the marcom-themed day with a talk about *"The Mobile Media Revolution: Will Print Become a Luxury Item?"*

- InfoTrends presentation of the findings from another PRIMIR research effort they are wrapping up titled *"eCommerce & Print Business Models."*

- Tom Ashley, Director and Founder, Pivotal Resources, USA, providing an overview on *"Emerging Printing Technologies,"* setting the stage for his upcoming spring presentation of findings from the PRIMIR study on this topic.

- Kip Smythe, Vice President NPES Global Programs, exploring *"The Market for Printing Equipment and Supplies,"* based on statistics collected through NPES' Market Data Program.

PRIMIR Members can access additional videos of each PRIMIR research study presentation in the members-only area of www.primir.org. For more information about PRIMIR membership, meetings and the research studies contact PRIMIR Managing Director Jackie Bland at phone: 703/264-7200 or e-mail: jbland@primir.org. ■



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