NPES has embarked in a bold new direction, with a new 2017-2020 Strategic Business Plan for The Industry. Centered around two priority focus areas, the overarching goals of the three-year roadmap are to: “Convene, Lead, and Drive the Global Printing & Imaging Value Chain toward Operational Excellence,” and “Position and Engage the Global Printing & Imaging Industry for Growth throughout the Value Chain.”

NPES’s ambitious new direction is based on data gathered from the Association’s outreach to more than 13,000 industry stakeholders—OEMs, printers and others—who shared their “what keeps me up at night” issues; industry leader telephone interviews; and, professionally facilitated strategic planning sessions with NPES Board members and staff. The NPES 2017-2020 Strategic Plan was finalized by year-end 2016 and launched in January 2017.

“This is a defining moment not just for NPES, but for the entire industry,” states NPES President Thayer Long. “Through the data obtained in the planning process, NPES learned that to effectively engage, advance and grow our industry, the value chain must be aligned and working together in lockstep. NPES’s new strategic vision, developed by and for our industry, offers a guiding blueprint for all industry stakeholders to achieve success through alignment, which is critical for sustained industry growth,” he continued.

To advance the plan, Advisory Groups comprised of industry stakeholders from across the value chain are currently developing initiatives within the six key “pillars” of the plan, titled:

1. Research: to provide actionable data for immediate implementation for the Industry’s value chain
2. Facilitate: as “master collaborator,” convene the value chain in interactive industry events to conduct Education, Business Networking, and Commerce
3. Advocate: engage the value chain to leverage advocacy and drive favorable business outcomes for The Industry
4. Brand: the Association as the heart of “The Industry” for all members of the value chain
5. Expand: new opportunities for Industry Research, Global Trade, Business Development, and promote The Industry into markets of opportunity through global channel development, and

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NPES President’s Perspective

It is truly a year of watershed change and transformation for NPES…and more importantly for the printing and imaging industry. As our cover article lays it out in more detail, I’m excited to update you on some major NPES initiatives that have been set in motion to create new value for all industry stakeholders.

NPES-PRIMIR Membership Merge: At the beginning of this year, NPES and PRIMIR memberships were merged giving NPES members unlimited access to all the top market research and industry intelligence from PRIMIR—annually valued at over $500,000! This unprecedented expansion of NPES benefits offers all of the essential information you will need to make the best-informed decisions to grow your business now, and in the future.

PRINT/GRAPH EXPO:
In April, NPES assumed full ownership of GRAPH EXPO and PRINT, which now allows the Association to pursue new directions, new partnerships, and new initiatives to benefit the industry and help solve for our attendees their “up at night” business challenges. This September, PRINT 17 heads to Chicago’s McCormick Place where the print community will discover lots of exciting new changes, gain effective new business strategies and tactics, and discover all the latest technologies.

NPES 2017-2020 Strategic Plan:
Let’s not forget that NPES is building upon a strong framework of current programs that can only be expanded via the direction of our new business plan and active engagement of our Advisory Groups, which are comprised of a broad cross-section of industry stakeholders. Take for instance the 2017 Legislative Conference, which achieved another successful advocacy effort in Washington, D.C. (See page 3.)

Looking ahead, we will reimagine this event within the context of our new strategic vision to best support and drive effective print industry advocacy.

NPES Trade Missions for Business Development: Similarly, our just-concluded Trade Mission to Indonesia included two successful conferences that demonstrated how U.S. technology can benefit printers in Indonesia. The conference series in Indonesia, and also in neighboring India, are recent examples of initiatives to seek out new markets for NPES members looking to expand globally. (See page 6.)

This is just the beginning—there is much more to come in our journey forward together. Stay tuned! Meanwhile, if you have any questions or suggestions, I look forward to hearing from you at: tlong@npes.org.

NPES Embarks continued from page 1

6. Train: by serving as The Industry’s education distribution channel and workforce development agent.

Looking ahead, “Our measurement of success will not be by how many members we obtain, or how large our events are, but instead, we will begin to measure the industry value chain alignment,” said NPES Chairman Mal Baboyian, Executive VP LFS/PPS, Canon Solutions America, Inc.

In tandem with this new direction, NPES Member benefits have recently been increased, with the merge of NPES and PRIMIR memberships to now provide NPES Members with unlimited access to valuable business intelligence—the foremost industry research from PRIMIR.

Next, from the strategic planning process, NPES additionally gleaned new perspective on optimizing industry organization partnerships to expand the benefits for the entire value chain. Subsequently, and working cooperatively with former Graphic Arts Show Company (GASC) co-owners Idelliance and Printing Industries of America, NPES assumed full ownership of the PRINT and GRAPH EXPO tradeshows. This modification will enable the industry to reimagine these events within the context of a new strategic vision to best support and drive print industry growth.

For more information about the NPES 2017–2020 Strategic Business Plan, and how to get involved, contact NPES President Thayer Long at phone: 703/264-7200, or e-mail: tlong@npes.org.

This is just the beginning…and we are excited about what’s ahead. Continue to check your inbox and watch industry publications for updates, as there is more to come!
“This is a critical moment,” says NPES President Thayer Long. “Postal reform needs a new leader. We can’t allow the momentum postal reform had in March to be dissipated.”

**Government Affairs**

NPES and IDEALLIANCE Bring Timely, Unified Message to Capitol Hill

**Legislative Conference Urges Support for Postal Reform**

The “First 100 Days” NPES-Idealliance 2017 Legislative Conference brought a timely and unified message to Capitol Hill, March 22-23, when nearly 50 printing, imaging and mailing industry executives met with 46 congressional offices urging support for postal reform, immediate 100% expensing of capital investment, and other top government affairs priorities of the $1.4 trillion industry that employs 7.5 million workers.

The conference was co-hosted by NPES and Idealliance, and supported by Presidential Sponsor Canon, and Executive Sponsors NAPIM—the National Association of Printing Ink Manufacturers, and TLMI—the Tag and Label Manufacturers Institute.

“Bringing printers, mailers and their suppliers together with Members of Congress and their staffs was well-timed grassroots advocacy said Idealliance Executive Vice President Ken Garner.

The urgent need for postal...
Illinois-based printers, suppliers and their Washington representatives met with U.S. Senator Tammy Duckworth (D-IL) (seated, r).

In a surprising recent development, postal reform leader OGR Chairman Jason Chaffetz has announced that he will be leaving Congress June 30. “This is a critical moment,” says NPES President Thayer Long. “Postal reform needs a new leader. We can’t allow the momentum postal reform had in March to be dissipated.”

Highlights of the Conference included issue briefings by D.C.-based policy experts, an address by Deputy Postmaster General Ronald A. Stroman, and a congressional reception, where attendees heard from H.R. 756 co-sponsors Congressman Elijah Cummings (D-7-MD), Ranking Member of the OGR Committee, and Stephen Lynch (D-8-MA), as well as their OGR colleague Carolyn Maloney (D-12-NY). “With crucial issues like these, it’s imperative for our industry to weigh in with the information legislators need to make informed decisions,” stated NPES Chairman Malkon Baboyian, Executive VP, LFS/PPS, Canon Solutions America, Inc. Baboyian’s sentiments were echoed by fellow NPES Board member Mark Kannenberg, President, RBP Chemical Technology, Inc., who said, “the Conference exceeded my expectations in all regards.”
NPES TOP GOVERNMENT AFFAIRS PRIORITIES

• Tax reform, including:
  • 100% expensing of capital investment
  • Lower tax rate for all businesses
  • Elimination of the federal estate tax and
  • Retention of the full advertising deduction.
• International trade agreements that foster U.S. manufacturers’ ability to successfully compete in global markets, and a fully staffed Export-Import (EXIM) Bank Board of Directors, to help level the export financing playing field for U.S. manufacturers.
• Health care reform that supports employer-based health insurance.
• Fair and efficient regulations and,
• Paper-based communications and commerce options where needed by citizens.

It’s imperative for our industry to weigh in with the information legislators need to make informed decisions.”

First-time attendee Don Schroeder, FUJIFILM North America Corporation, noted that “a key takeaway was a better understanding of the issues facing the industry, and the political context and process in which they are being addressed.” NPES President Thayer Long added that the Conference provided the opportunity to “network across printing, imaging and mailing industry associations.”

“The Conference was both an opportunity and a responsibility to reach out to our congressional representatives on issues of concern to the printing, imaging and mailing industry,” said NPES Government Affairs Chairman Greg Salzman, President, Aleyant Systems.

While Idealliance Chairman Tim Johnson, CEO, Impact Proven Solutions concurred stating, “this type of grassroots advocacy is something that every association member should consider attending.”

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

NPES Vice President, Government Affairs Mark Nuzzaco introduced postal reform supporter Congresswoman Carolyn Maloney (D-12-NY) at Conference Congressional Reception.

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Southeast Asia’s largest print market, and the world’s fourth largest country, Indonesia was the ideal destination for NPES members seeking to explore the country’s burgeoning packaging and publishing markets. The NPES 2017 Trade Mission to Indonesia held April 25-28, 2017, provided a unique fact-finding experience to explore the market potential of the Indonesia printing/packaging industry, which included two plant visits to Yogyakarta-based printers Kanisius and Solo Murni.

Taking advantage of the significant opportunity to introduce to the Indonesian market the productivity and collaboration benefits of partnering with U.S. technology, NPES members sought to develop new business relationships and solidify export opportunities to expand their businesses globally.

The NPES Trade Mission also offered an exceptional forum to conduct two industry conferences. First, the NPES PrintPack Outlook Conference 2017, themed “Using U.S. Technologies to Grow Your Business,” in Yogyakarta held April 25, 2017 at the Hotel Tentrem, co-sponsored by PPGI, with support from sponsors: the U.S. Department of Commerce, ICC, PRIMIR, ATGMI, Aleyant, Alwan Color Expertise, Brandtjen & Kluge, Eagle Systems, Flint Group, Kodak, PRIME UV/IR, QuadTech, TOSI, and X-rite Pantone.

William Li, ICC Co-Chair and Kodak Color Technology Manager spoke on the importance of color standardization in the printing and imaging industry.

The Yogyakarta conference attracted the attention of millennials, keen to participate and question the expert speakers. The morning coffee break provided an excellent networking opportunity for attendees, eager to catch up on the latest trends in printing and imaging.
NPES President Thayer Long welcomed the more than 100 attendees to this first-time event in Yogyakarta, and opened the conference with a presentation on the “Worldwide Market for Print 2.0: Global Opportunities in Packaging” tailored to market trends in Indonesia. Presentations that followed showcased expert speakers from the U.S. and Southeast Asia who addressed a broad range of topics touching on the print and packaging industry worldwide.

The conference closed with a lively and interactive panel discussion co-moderated by Tuti Buntaran, PPGI Vice-President IT and Graphic Technology, and Marco Gandasubrata.

Moving next onto Jakarta for the 2017 Labels and Packaging Innovation Conference, also cosponsored by NPES, trade mission participants attended a diverse two-day program covering topics ranging from packaging design to production to business management issues. On day two of the conference, the afternoon session was devoted to NPES presenters and included another engaging expert panel session.

For more information about NPES Global Programs in Indonesia, or upcoming NPES Trade Missions, contact Pernilla Jonsson, Senior Director, NPES Global Programs at: pj@npes.org.

"Applause! Applause!

CALL FOR NOMINATIONS: NPES 2017 GEGENHEIMER AWARDS

The 2017 Harold W. Gegenheimer Awards for Industry Service are your opportunity to recognize exemplary Individual and Corporate leadership and commitment to building a strong future for the printing and imaging industry.

Named in honor of the former Chairman of Baldwin Technology Company and former President of NPES, the awards are presented annually to one NPES member company, and one individual employed by a member company.

Nominations are open from June 1 to September 1 for the awards that will be presented at the NPES 2017 Annual Conference and PRIMIR Fall Meeting, coming October 16-18, 2017 to the Scottsdale Resort at McCormick Ranch, in Scottsdale, Arizona. Delegates of any NPES member company may submit nominations for the Individual and Corporate Service Awards. For complete award criteria, and to download a nomination form, visit: www.npes.org/members/gegenheimerawards.aspx.
Now is time to look at digital printing in a different context. The industry should identify which other parts of the workflow and business models accelerate or suppress print.

**Megatrends in Printing Applications**

Megatrends define our future world and its increasing pace of change. Today, as technology matures with more capable equipment, innovations, and lower capital and operating costs, digital printing continues to impact traditional print technologies and the traditional print value chain.

PRIMIR recently released the “Megatrends in Printing Applications” study, identifying long-term macro changes affecting print’s page volume, technology, and the very way print is performed, which is permanently altering the fundamental nature of the business. It also quantifies the continuing decline in total page volume, changing composition of print, and co-existence of both analog and digital print technologies.

According to the research, most pages lost from 2007-2016 stemmed from newspapers, magazines, and catalogs, while publishing is under severe continuing pressure as consumers shift to electronic communication alternatives for information. Document printed pages, including marketing collateral and transaction statements, also are under threat. Packaging is the only major print category where consistent volume growth is expected, with its share of all pages printed expected to double between 2007 and 2020.

Now is time to look at digital printing in a different context. The industry should identify which other parts of the workflow and business models accelerate or suppress print. We need to keep measuring and observing print volume, and recognize that digital page volumes, although small today, are the pathway to growth.