PRINTscape: World-Wide Markets & Megatrends

NPES 2016 ANNUAL CONFERENCE AND PRIMIR FALL MEETING

Imagining industry leaders seeking the latest market intel and business growth opportunities will gain the answers they need at the NPES 2016 Annual Conference and PRIMIR Fall Meeting. Coming November 14-18, to Marco Island, Florida, this year’s combo education and networking event themed, “PRINTscape: World-Wide Markets & Megatrends,” will deliver the latest data and market updates based on newly completed industry research, and explore new and expanding international business growth opportunities.

Highlights of the information-packed program will include numerous networking opportunities for NPES and PRIMIR members to gather together with peers to exchange new insights and perspectives and make invaluable new business connections.

Following NPES and PRIMIR leadership meetings earlier in the day, the conference will kick off in earnest on Monday evening with a Welcome Reception and Dinner where NPES Chairman, Malkon “Mal” Baboyian, Executive VP, LFS/PPS for Canon Solutions America, will greet participants, spouses and guests. Later in the program, Mal’s Chairman’s address will update members and guests on the ambitious new Association business plan slated for rollout in the first quarter of 2017.

First up on Tuesday morning, Frances Cicogna, PRIMIR Chair, and Manager, Business Development & Segment Marketing, Canon USA, will open the day’s program with a welcome to all, and bring back to the podium returning (and ever-popular) keynote, Alan Beaulieu, President, ITR Economics, to present his Economic Forecast 2017 — The Road Ahead. Mr. Beaulieu’s economic and market updates always provide invaluable perspective that business leaders translate into strategic decisions to enhance their profits and market position.

Next up, the first of two new PRIMIR studies will be presented, “Megatrends in Digital Printing Applications,” an update of the 2010 study of the same title. Study author, Marco Boer, Vice President, I.T. Strategies, will discuss the current study data that presents a comprehensive view of North American (U.S. and Canada) digital printing and its impacts using 2015 as a benchmark to provide forecasts through 2020. From the study results, he will share general worldwide insights, plus the challenges and opportunities facing NPES and PRIMIR members in the years to come.

Next, following the interactive Member Exchange to further explore the study results, attendees will convene in roundtable PRIMIR and NPES Task Forces to shape the “PRIMIR 2.0” research topics for 2017, including the scope and objectives for each, and respective research format: study, white paper, webinar, etc.

The lineup of research topics, selected by an earlier survey of PRIMIR and NPES members, will include:

- Global Trends in Packaging Affecting N.A. Converter & Supplier Markets
- Printing Industry Consumables Usage & Trends
- Service to Printers Trends and Outlook
- The North American Market for Plastics in the Printing Industry
- The Retail Printing Product Evolution in a More Digital World; and,

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For those looking for transformation, leadership, and innovation—keep a close eye on NPES over the coming months.

Thayer Long, NPES President

Wherever the industry goes, so, too, must the value chain—in alignment and moving forward together in lockstep. Today our industry, which includes OEMs, distributors, imaging services providers, media buyers, and end users, is moving closer together through greater collaboration and partnerships.

Synchronization makes good business sense, and in today’s market it is a necessity. The current transitioning is a signal that our business challenges, and also pathways to new opportunities, are coming into alignment.

What is important to one is important to all. This fact was made crystal clear during the recent NPES business planning meeting, and was also evident from the survey data gathered for this session from nearly 13,000 business leaders and companies within the supply chain.

For those looking for transformation, leadership, and innovation—keep a close eye on NPES over the coming months. The Association is developing a new, market-leading position. The outcome of this effort will be an inclusive and collaborative forum in which industry leaders will learn from each other, develop long-term solutions to the aligned market challenges, and create exciting opportunities to grow the industry throughout the world.

From this new vantage point, the industry will achieve business growth in an era of technology innovation, increasing regulatory challenges, market access concerns, record M&A deals, and transitioning workforce dynamics. In this dynamic scenario, industry businesses will access actionable information and data “real time,” so that what they learn in the morning can be implemented that same afternoon.

We look forward to sharing the new NPES with you in the coming weeks and months ahead. The metamorphosis has already begun, and it is going to be awesome.

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• Adoption of LED UV Curing in Package and Label Printing.

Rounding out the day, Tuesday evening will conclude with a Networking Reception and Awards Dinner, where the recipients of this year’s PRIMIR Service Awards and the Harold W. Gegenheimer Awards for Industry Service will be recognized and celebrated.

On Wednesday, the program will resume with a presentation on the second new PRIMIR study, led by David Humphreys, Director of Custom Research for the Americas at The Economist Intelligence Unit. This follow-up to the 2015 landmark “World-Wide Market for Print” (WWMP) study will be an exclusive look at the global packaging industry in the new study titled, “World-Wide Market for Print – Packaging,” which will feature six countries selected for “deep-dive analysis” that are either the largest markets or fastest-growing countries.

For complete information about the NPES 2016 Annual Conference and PRIMIR Fall Meeting, and to register, visit: www.npes.org/AC16_PRIMIR; or contact Carol Lee Hawkins at phone: 703-264-7200 or email: clhawkins@npes.org.

LAST CALL: Nominations for NPES 2016 Gegenheimer Awards

Nominations for the 2016 Harold W. Gegenheimer Awards for Industry Service are due by September 30, 2016. Don’t lose out on this opportunity to recognize personal and corporate leadership and commitment to building a strong future for the printing industry and its suppliers.

The awards, to be presented during the NPES 2016 Annual Conference and PRIMIR Fall Meeting, November 14-16, 2016, in Marco Island, Florida, are named in honor of the former Chairman of Baldwin Technology Company and former President of NPES, and presented annually to one NPES member company, and one individual employed by a member company.

Delegates of any NPES member company may submit nominations for the Individual and Corporate Service Awards. For complete awards criteria, and to download a nomination form, visit: www.npes.org/members/gegenheimerawards.aspx.
The global economy has become more competitive as companies of all sizes seek to expand beyond domestic borders, and information technology is enabling smaller companies to also venture profitably outside of the U.S. into foreign markets.

DID YOU KNOW...

U.S. exports of printing equipment to these countries totaled this much in 2015?

Brazil: $27,428,479
China: $80,293,006
India: $24,147,340
Indonesia: $11,137,971
Japan: $17,836,268

Is YOUR COMPANY represented in these sales? Or are your competitors? If you’re not, it might be time to reassess your international business development strategy!

NPES Makes Key International Markets Profitable and Easy to Navigate

Did you know that 95% of the world’s population lives outside of the United States and that one in four manufacturing jobs depends on exports? In the U.S., manufacturing is the most productive exporting sector, totaling in excess of $1.3 trillion in 2015, accounting for 87% of the nation’s total merchandise export activity. In short—international trade is essential in order to make the U.S. printing industry more competitive, as well as fueling and developing our own economy. NPES has already successfully established a new office and in-country director in 2016, in Jakarta, Indonesia creating a new entry point for the East Asian Pacific region. This adds to our roster of international offices and staff, maintained in Shanghai, China and New Delhi, India; as well as, representatives in Brazil, Europe and Japan—all providing key research on growing markets worldwide.

The global economy has become more competitive as companies of all sizes seek to expand beyond domestic borders, and information technology is enabling smaller companies to also venture profitably outside of the U.S. into foreign markets.

In recent years, as demographics change where the middle class populations have grown significantly, printing and packaging companies in these countries are seeking to implement the latest and most advanced technologies. By exploring entry into foreign markets, or creating partnership opportunities, progressive U.S.-based companies are increasing their ability to tap into these expanding overseas opportunities.

NPES International Trade Programs at GRAPH EXPO 16

NPES, known globally for operating a dynamic and aggressive international trade program, will be at GRAPH EXPO 16 to assist member companies in identifying international markets with the best potential for sales.

We will provide several networking opportunities, including the International Networking Reception on Tuesday, September 27, 4:00 p.m. - 5:50 p.m., in the International Business Center, Room N220FG. This event presents an excellent networking opportunity for companies desiring or working to expand international relationships, to explore international markets, or to make direct introductions to U.S. manufacturers. Come and network with your industry partners, peers and clients. Registration is free, but you must advise NPES of your plans to attend by e-mail to Pernilla Jonsson at: pjonsson@npes.org.

In addition to the International Networking Reception, the International Business Center located in Room N220FG is the epicenter for international business networking at GRAPH EXPO. Here, delegations of printers from around the world will congregate to plan their daily activities. The International Business Center offers a comfortable environment to meet with potential international customers, as well as to talk to our international and domestic NPES staff members. NPES is here to assist companies succeed in the exciting, expanding international marketplace. For questions or further assistance please contact Pernilla Jonsson, Assistant Director, International Trade Programs, at phone: 703/264-7200 or e-mail: pjonsson@npes.org.

2017 INTERNATIONAL EVENTS

- NPES Print Business Outlook Conference
  February 3, New Delhi, India
- PrintPack India
  February 4-8, New Delhi, India
- Printing South China
  March 1-3, Guangzhou, China
- Label & Packaging Show
  May, Jakarta, Indonesia
- CHINA PRINT 2017
  May 9-13, Beijing, China
- EXPOGRÁFICA 2017
  May 17-20, Guadalajara, Mexico
- Forum Grafika Digital
  August, Jakarta, Indonesia
- IPEX 2017
  October 31-November 3, Birmingham, UK
- Pamex 2017
  December 18-21, Mumbai, India

2017 INTERNATIONAL EVENTS
One on One with Steve Mattingly

Steven “Steve” Mattingly is Senior Vice President at North Carolina-based Southern Lithoplate (SLP), where he is approaching almost 30 years of industry service. Prior to SLP, his career path included M&M/Mars; Banking; and Consulting. Mr. Mattingly graduated from the University of Louisville with a Business in Commerce degree.

Mr. Mattingly serves on the NPES Board of Directors and is also a board member at the Southern Newspaper Publishers Association (SNPA) and is an active member of PRIMIR. In his spare time, Steve is a certified professional coach and a certified master diver.

With a distinguished heritage dating back to 1934, how have your customers’ needs changed over the years, and what business values have sustained Southern Lithoplate (SLP) as an industry leader in your niche market?

SLP enjoys an 82-year legacy. I had the privilege to transition from consultant for SLP to a full team member in 1991. Today, we continue as a third generation, American owned, operated, entrepreneurial, and privately held, print-centric company. Over time, both customer needs and technology have changed dramatically. SLP has listened and responded: from making WWII war maps on zinc for the U.S. Dept. of Defense on D Street in Washington, D.C., to being the first to manufacture litho sheet with rolled aluminum, to helping lead well over a thousand printers through the digital CTP revolution in the last decade. Today’s printers require more than quality products; they thirst for prepress and pressroom solutions supported by know-how. SLP’s passion for delivering affordable technology and technical service, coupled with our in-depth know-how, has earned us the reputation as the brand leader in our niche.

In response to evolving domestic and international market conditions, what are some of the technological changes and challenges that Southern Lithoplate has faced and overcome?

In 1988, we met as a small team and forged our sustaining mission: “Deliver constant improvement in quality, focus on family and customers first, work and play hard, and fear no one nor any situation—so that all stakeholders enjoy the benefits.” Continuous and balanced investment in our fantastic team of people, in our products, patents, manufacturing, IT, ERP, and CRM technology has been paramount. Parallel to the challenge of technology has been the challenge of print consolidation. This presented the opportunity for SLP’s acquisition of manufacturing assets and patented technologies from DuPont Imperial, Citiplate, 3M/Imation and Konica Minolta.

Our superb team of empowered employees is led by Trip Casson, Chairman & CEO, and Clark Casson, President & COO. Together, they have diligently dovetailed 82 years of know-how into state-of-the-art, PLC controlled, manufacturing facilities, which included significant, recent investments for no process technology in both our MI and NC manufacturing campuses. Combining our manufacturing capacity, rich knowledge of the marketplace, depth of our strategic alliances and our SLP Solutions consulting group, delivered via our ‘direct-to-market’ approach, SLP has a solid, sustainable foundation to support our current and future customers.

As timely industry market intel is critical for any company’s strategic planning process, how has your involvement in PRIMIR contributed to Southern Lithoplate’s success?

It has been an honor to support our industry through NPES and PRIMIR dating back to 1992. Circa 2000, as the market was in the early adoption stages of digital imaging, SLP elected to advance with thermal technology as a direct result of NPES research data. Secondly, actively participating in those studies as a task force member provided deep insights into how we should carve out our niche. Definitely the right choice, given that 82% of the U.S. market is indeed thermal.

Most recently, co-chairing the 2011 “Economic Indicators for Print” and the 2016 “Future of Print in the U.S.—Landscape, Implications and Opportunities” studies, SLP is deploying the knowledge base and direct access to experts to aid us in navigating the unpredictable trade winds of the economy through the next recession, predicted to arrive in Q2 2019 and continue well into the future.

Looking ahead to the next three to five years, what trends do you see for our industry? Why are you optimistic about the future?

Acknowledging the findings contained in “Future of Print in the U.S.—Landscape, Implications and Opportunities,” it is apparent the USA print market is approaching yet another major structural shift. While print remains the core profit arm for both printers and advertisers, we all compete, knowingly, with the rapid progression of mobile. No one can alter the course of the economy, nor the end user’s move from static print to a digital, interactive world. Just as a caterpillar metamorphoses into a butterfly, print will not disappear, but rather will evolve into a wonderfully vital element of tomorrow’s communications marketplace. As a new member on the NPES Board, we are most excited about the energy and enthusiasm for positively impacting print in the USA. The NPES and PRIMIR Boards’ passion for strategy and collaboration, fueled by entrepreneurial spirit, provides great promise for all our collective futures.
If the U.S. doesn’t participate through TPP in setting the rules of trade in this huge and vibrant region of the world, NPES members, other U.S. manufacturers, and consumers in general will be disadvantaged.” —NPES President Thayer Long

NPES Pushes for Trans-Pacific Partnership (TPP):
FREE TRADE AGREEMENTS ESSENTIAL TO EXPANDING U.S. EXPORTS

“With 95% of the world’s consumers living outside of the United States, exporting can bring substantial benefits to American manufacturers and their workers,” says NPES President Thayer Long. One of the ways the Association is working hard to make more international markets available to its members is by supporting the Trans-Pacific Partnership (TPP) and urging Congress to approve it this year. “If the U.S. doesn’t participate through TPP in setting the rules of trade in this huge and vibrant region of the world, NPES members, other U.S. manufacturers and consumers in general will be disadvantaged,” Long adds. “Many good-paying American jobs depend on exports.”

TPP is a multilateral free trade agreement (FTA) among eleven Pacific-rim nations and the United States. Six of the 11 already have FTAs with the U.S. (Australia, Canada, Chile, Mexico, Peru and Singapore), five do not (Brunei, Japan, Malaysia, New Zealand and Vietnam). With a combined population of more than 490 million and an overall economy of more than $10 trillion (almost 14% of the global economy) the 11 TPP countries represent a combined market for U.S. goods and services close to the size of the European Union (EU), which (pre-Brexit) is home to nearly 510 million people and has a $16.2 trillion economy. When the U.S. is added to the 11 TPP nations the total FTA would constitute about 36% of the world economy.

NPES and its allies in The U.S. Coalition for TPP, comprised of more than 400 business organizations of all sizes from diverse industries, are urging President Obama and Congress to redouble their efforts to approve TPP this year. According to NPES Government Affairs Director Mark Nuzzaco, “TPP is critical to promoting U.S. economic leadership in the Asia-Pacific region, as well as globally. The agreement shouldn’t be jeopardized by the current Congress failing to approve it.” Ratification this year is especially important given that TPP is opposed by both major party presidential candidates, one of whom presumably will be in the White House beginning in 2017. “This opposition to TPP is especially unfortunate,” says Nuzzaco, “given that exports spurred by FTAs like it have, according to the U.S. International Trade Administration, proven to support higher-paying U.S. jobs.”

Notwithstanding campaign rhetoric to the contrary, U.S. Government data also show that FTAs have supported export increases that sustain and expand U.S. manufacturing employment. TPP will add to this by opening more markets and expanding opportunities for U.S. manufacturers. It sets strong, enforceable rules for U.S. trade with the TPP countries and will help create a fairer international trading system.

Additionally, TPP contains first-ever provisions to improve American competitiveness, including prohibitions on digital protectionism, new rules on fair competition with state-owned enterprises, tools to promote small business exports, stronger intellectual property rights, and good governance rules to fight corruption. “Exports are a very important part of our business,” says NPES Government Affairs Chairman Greg Salzman, President, Aleyant Systems, a provider of software services to the graphic communications industry, “and TPP will help facilitate significant new commercial opportunities for our products in a region of the world with growing economies. U.S. companies simply can’t afford not to be competitive players in these markets.”

Finally, not only will TPP help U.S. manufacturers gain greater access to export markets, but it will also have a salutary impact on U.S. manufacturers’ costs in obtaining from TPP countries raw materials not readily available in the United States, which can then be used in manufacturing U.S.-made products for both domestic consumption and export.

NPES invites its members to share their stories of commercial successes and challenges in exporting. And, it urges them to contact their elected members of Congress in support of FTAs in general and TPP in particular. A grassroots tool to help facilitate such messages is found at: http://npes.freeenterpriseaction.com/BzDrEtEa

For more information, contact NPES Government Affairs Director Mark J. Nuzzaco at phone: 703/264-7255 or e-mail: mnuzzaco@npes.org.
Max Derhak to Receive Macbeth Award for iccMAX

Dr. Max Derhak, Principal Scientist at Onyx Graphics and Co-Chair of the International Color Consortium (ICC), has been recognized with the Macbeth Award from the Inter-Society Color Council (ISCC), the principal professional society in the field of color in the United States encompassing the arts, sciences and industry. The award is given for one or more recent outstanding contributions in the field of color.

“Maxim Derhak has been selected by the award committee for his work on spectral color reproduction in the graphic arts—what has become known as iccMax,” said Dr. Danny C. Rich, Chair of the Macbeth Award Selection Committee. “We felt that this development was both recent and significant in its achievements and thus deserving of the recognition of the ISCC.”

William Li, ICC Co-Chair, affirmed that “iccMAX is a truly ground-breaking advance in the way we communicate colour between different devices and colour spaces. Through his leadership of the Architecture Working Group in ICC, Max Derhak has been the prime mover in this development.”

iccMAX will be the focus of the ICC DevCon Developers Conference set to take place in San Diego, California, November 7, 2016, in conjunction with ICC meetings and the Society for Imaging Science and Technology’s IS&T CIC 24, at which the award will be presented to Dr. Derhak.

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ICC DevCon 2016 Developers Conference

FOCUS ON ICCMAX® REAL WORLD SOLUTIONS AND APPLICATIONS

Themed, “iccMAX—Real World Solutions and Applications,” the International Color Consortium Developers Conference, ICC DevCon 2016, will take place on November 7, 2016 at The Westgate Hotel in San Diego, California. The Conference will be held in conjunction with the Society for Imaging and Science and Technology’s (IS&T) 24th Color and Imaging Conference (CIC 24).

ICC DevCon 2016 will focus on real-world scenarios directly addressed by iccMAX-based approaches, which could not be easily accomplished with previous color management solutions. Topics to be presented will include:

- General overview of iccMAX
- Correction of display viewing angle with iccMAX
- Color tuning of a painting by a multi-spectral lighting system with iccMAX
- Modeling colour vision deficiency with ICC profiles
- A spectral workflow for encoding and analyzing artwork with iccMAX, and
- Observer metamericism correction on wide color gamut display using iccMAX.

In addition, a hands-on workshop will actively engage participants in utilizing RefIccMAX, which is among the iccMAX reference implementation library and tools, and a starting point to create and use iccMAX profiles. Topics to be covered will include:

- Overview of projects, code, libraries, and tools available in RefIccMAX
- Using iccXML to create workflow specific iccMAX profiles
- Incorporating data from other sources like MATLAB/Octave
- Applying iccMAX profiles, and
- Integration of the RefIccMAX CMM into personal projects.

ICC DevCon 2016 allows attendees an opportunity to learn from the experts—experienced developers and users in the imaging, printing and publishing color community.

New member companies that join the ICC during DevCon 2016 will receive a reduction in their membership investment equal to their paid conference fee.

For complete information about ICC DevCon 2016, and to register, visit: www.npes.org/ICCdevcon2016.
This year’s competition received a record 403 entries, surpassing the previous mark of 287 set in 2015. We are already planning for next year’s Student Design Competition.

GAERF 2016 Student Design Competition Winners

RECORD NUMBER OF ENTRIES SUBMITTED

The Graphic Arts Education and Research Foundation (GAERF) has announced the winners of the GAERF 2016 Student Design Competition from among this year’s record 400-plus entries. The annual contest, now in its eighth year, and themed for 2016 “Infograph It!”, challenged students from secondary and post-secondary institutions to design and create an engaging printed item that incorporates an infographic—a graphic design that presents complex information quickly and clearly—on a topic of their choice.

An independent panel of industry expert judges chose six winners from among the entries received—three at the secondary school level and three at the post-secondary school level.

First place winners and their instructors will each receive a two-day all-inclusive paid trip to attend GRAPH EXPO 16 in Orlando, FL. In addition, first place winners will be presented with $2,000 checks during GRAPH EXPO’s Career Awareness Day on Wednesday, September 28, 2016. The second place winners will each be awarded $1,500, and the third place winners will each receive $1,000.

Speaking out about the merits of GAERF’s annual student design competition, “In our age of information overload, journalism students need the skills and tools to create pieces that cut through the clutter and clearly communicate complex information and ideas. Thanks to the incentives offered by the GAERF infographic contest, my students had an extra push to refine their compelling work. It was motivation beyond a grade which helped them create the best work I’ve seen since I started teaching my Visual Communication for the Mass Media course,” stated Daria Matza, Instructor, California Polytechnic State University, San Luis Obispo, CA.

Equally pleased with the learning opportunity that the competition provided, and also recognizing her student’s achievement in garnering second place in the post-secondary school category, “It made my day!” said Colleen Larkin Twomey, Assistant Professor, Cal Poly State University, Graphic Communication Department, San Luis Obispo, CA. “More importantly,” she continued, “I so enjoy adding the student competitions to my class curriculum, the students have more ‘skin in the game’. The class I assigned to this competition was my prepress class, which is not necessarily a design class, but I wanted them to experience the competition with their creative freedom. I’m so delighted Kelli placed, she’s an absolutely wonderful young lady. Thank you again for taking keen interest in the brilliant young minds that are soon to be entering our industry.”

“GAERF is proud to continue its commitment to supporting education initiatives by encouraging creativity and self-expression in students through the art of design and production,” said GAERF President Thayer Long. “This year’s competition received a record 403 entries, surpassing the previous mark of 287 set in 2015. We are already planning for next year’s Student Design Competition when GAERF will again recognize our best and brightest students, as well as the significant commitment of their instructors.”

All student entries will be featured in a special display within GRAPH EXPO 16’s Education Main Street, and showcased on the graphicCOMMcentral website: www.graphiccommcentral.org.
Now’s the time to come forward and help shape the research that will deliver the findings, analysis, implications and opportunities that you need to be successful.

Want Strategic Business and Market Intelligence?

2017 PRIMIR RESEARCH LINEUP ANNOUNCED—CALL FOR TASK FORCE MEMBERS

“PRIMIR 2.0” provides progressive companies the opportunity to directly customize market research to meet their company’s intelligence needs—in any or all of the new lineup of 2017 PRIMIR research.

This member-driven process ensures that the resulting research products—full or mini-studies, white papers or webinars, will be conducted through the proven PRIMIR methodology for producing comprehensive, in-depth research.

Your NPES and PRIMIR colleagues throughout the industry identified and prioritized the 2017 lineup. Now’s the time to come forward and help shape the research that will deliver the findings, analysis, implications and opportunities that you need to be successful.

New task forces established for 2017 will manage research on the following topics:

• Global Trends in Packaging Affecting N.A. Converter & Supplier Markets (2009 study update),
• Printing Industry Consumables Usage & Trends (2011 study update),
• Service to Printers Trends and Outlook,
• The North American Market for Plastics in the Printing Industry,
• The Retail Print Marketing Product Evolution in a More Digital World, and
• Adoption of LED UV Curing in Package and Label Printing.

To join any of these new task forces, contact Rekha Ratnam, PRIMIR Managing Director, at e-mail: rratnam@primir.org or phone: 703/264-7200.