



# news

THE ASSOCIATION FOR SUPPLIERS OF PRINTING, PUBLISHING AND CONVERTING TECHNOLOGIES

## NPES in India:

### REACHING OUT TO A MARKET OF BIG POTENTIAL, LINGERING OBSTACLES

As the world's most populous democracy, boasting a printing and publishing industry that's growing at rates as high as 14 percent annually, India offers U.S. companies a promise of growing sales and expanding networks of dealers, distributors, and customers.

But the Indian printing industry is also contending with some familiar challenges, including a lack of a qualified work force to seize all of its global opportunities. Moreover, government policies, including import duties and other regulations, continue to complicate trade relationships between India and its major partners overseas — among whom the United States ranks first.

Those were the key findings of a week-long NPES trade mission to India that took place early in February.

NPES has been working for more than a decade to build market opportunities for members in India, and has expanded this effort in recent years. The February mission was tied to two major events: the opening of the new NPES India trade center in Delhi



H.S. Sidhu elaborates on production operations at Thomson Press in Faridabad, 30 miles from Delhi.

and the eAge Print 2006 exhibition in Chennai.

The Indian economy is growing at approximately 8 percent per annum and the printing industry is

growing at about 12 percent, leading to large capital investments and expansion," reports **Loretta Vaz**, sales and marketing representative for Pantone, Inc. "This is creating a rapidly growing demand for state of the art technology— equipment and consumables."

Former NPES Chair **Kathryn Marx** of Flint Group agrees there is a significant opportunity in India. "We're excited about the growth prospects, and cautiously optimistic," she says.

However, Marx notes that many factors

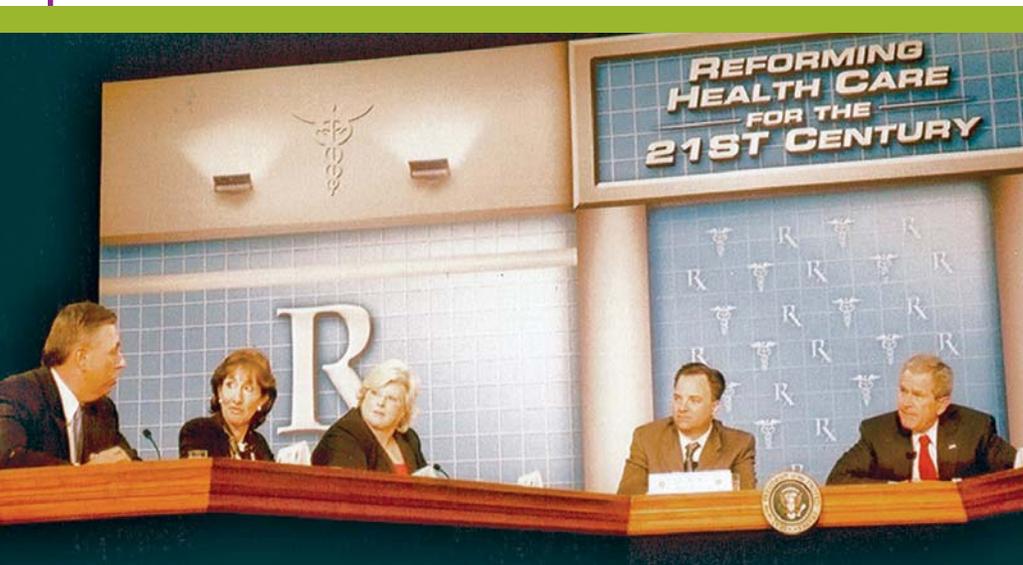
continue to complicate the trade picture in India, and efforts like that of NPES remain vital in helping companies navigate this challenging environment.

The group that visited India in early February included **Tim Mercy**, Vice President/Sales for Asia/Pacific at Goss, Inc., Kathryn Marx, and **Carmine Matarazzo**, Technical Director in the Print Division at Pantone, Inc., along with former President Regis J. Delmontagne, International Trade Director Michael Hurley, NPES India

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# NPES Government Affairs Chair Sounds Out Health Care Reform on Panel with President Bush



Bruce Goodwin, far left, discussed Health Savings Accounts with President Bush and panelists.

**W. BRUCE GOODWIN**, PRESIDENT OF GLUNZ & JENSEN, INC., AND CHAIRMAN of the NPES Government Affairs Committee, participated in a unique Health Care Reform panel discussion with President Bush at the U.S. Department of Health and Human Services on February 16. Goodwin told the President about his company's success in implementing Health Savings Accounts (HSAs), as a means of stemming the burgeoning costs of providing health care benefits for his employees.

Goodwin's invitation to join this panel was precipitated by a series of meetings held between the NPES Government Affairs Committee with Administration officials over the past two years. During those meetings, HSAs and other NPES government affairs priorities were discussed.

Others on the panel with Goodwin included Dr. Mark McClellan, Administrator of the Center for Medicare and Medicaid Services, U.S. Department of Health and Human Services; Dr. Gail Wilensky, former Administrator of the Center for Medicare and Medicaid Services, now serving as a Senior Fellow at Project HOPE; Robin Downey, head of product development at Aetna Insurance Company; and Dan Evans, CEO of Clarion Health Partners, an academic medical center in Indianapolis, Indiana.

President Bush began the discussion by noting the importance of market forces as a means of keeping health care affordable to employers and employees. His 2007 budget includes proposals the Administration believes will make health insurance more available, more flexible, and more affordable, as a result of putting employer insurance, individually-purchased insurance and out-of-pocket health spending on an equal footing.

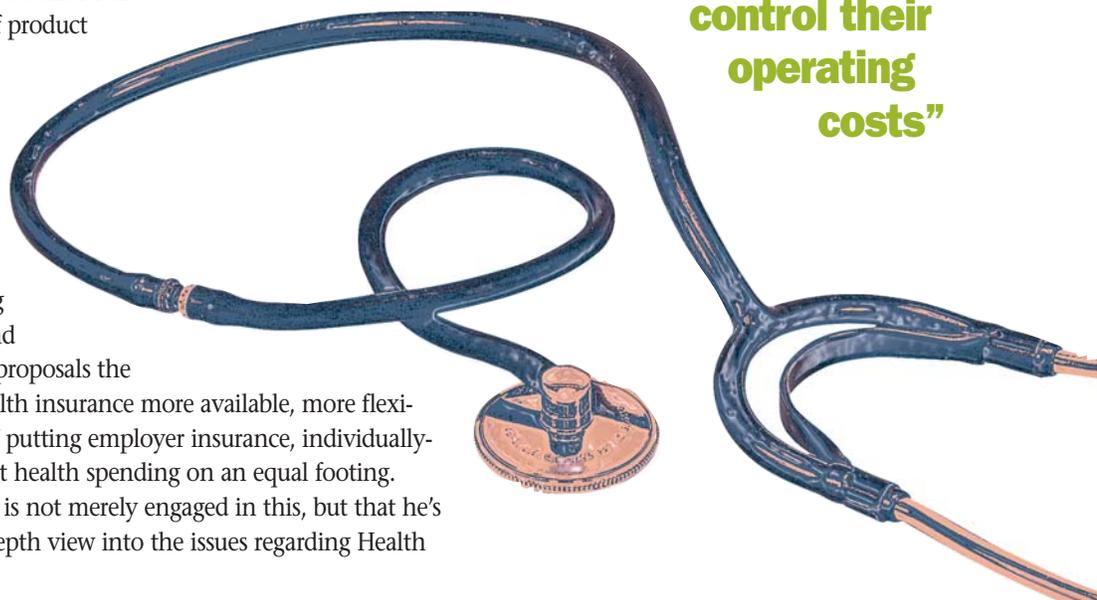
"I was impressed that the President is not merely engaged in this, but that he's extremely well-informed with an in-depth view into the issues regarding Health

Savings Accounts," said Goodwin.

New budgetary provisions would include making HSAs more flexible and accessible, and HSA contributions would be allowed up to a plan's out-of-pocket limit. Additionally, a credit for payroll taxes paid (up to 15.3 percent) on HSA contributions would be allowed to place out-of-pocket spending on an equal footing with health insurance.

Under the current law, workers allow a portion of their pay to be withheld in tax-free, interest-bearing HSAs to pay for out-of-pocket medical expenses. Workers under 65 must have health insurance deductibles of at least \$1,050 (individually), or \$2,100 (family plan). Proponents believe that individuals will become better consumers when they start spending their own money and thus prompt providers to be more competitive. Unused balances can grow and compound from year to year, thus affording participants greater resources as they become older, when costs typically

**"The role of NPES here is not to promote HSAs per se, but to be an advocate for employers to control their operating costs"**



increase. HSA participants are required to have a high-deductible health insurance policy in conjunction with their HSAs to cover catastrophic health care needs. Individual employers make the decision whether to pass on to their employees some or all of the insurance premiums for this coverage.

Glunz & Jensen exemplifies a relatively small private sector employer that has successfully employed HSAs as a means to mitigate increasing health care insurance costs, while continuing to provide its employees with comprehensive quality health care. Goodwin believes that certain features of HSAs can be improved to make them more attractive to more employers. His message to President Bush is one he has shared with many business leaders and government officials: HSAs are but one strategic tool that companies can deploy to minimize operating costs in order to compete in today's global economy.

Goodwin is also enthusiastic about the part that associations like NPES can play in influencing public policy. "The role of NPES here is not to promote HSAs per se, but to be an advocate for employers to control their operating costs," says Goodwin. "If folks at our member companies have ideas about health care, which is such a major concern for employers in the United States, we can certainly be effective information providers and channel their messages to the right venue."

*The NPES Government Affairs Committee will continue to closely follow the development of HSAs, and keep the Association membership apprised. For more information contact Government Affairs Director **Mark J. Nuzzaco** at 703/264-7200, or e-mail [mnuzzaco@npes.org](mailto:mnuzzaco@npes.org).* ●

# chairman's perspective

## Thomas Saggiomo

NPES Chair  
President, Agfa Graphics NAFTA

### Competitive Strategy

In my last column (*NPES News January 2006* <http://www.npes.org/newsJAN06.pdf>) I addressed some business practices that distinguish everyday companies from the successful companies. "Smart Business" can be difficult at first, especially in the face of growing market pressure. Failure to act can only make it more difficult to transform your company to a winning strategy.

In this installment, I'd like to focus on another important business tenet: plotting a competitive strategy. Two classic business books come to mind.

In 1980, Michael Porter, the acclaimed Harvard business professor, preached in his book "Competitive Strategy: Techniques for Analyzing Industries and Competitors" about successful companies plotting their paths to success. Over twenty-five years of business cycles have transpired since the work was published and Porter's insight still rings true today. While some companies are lucky and they stumble upon a successful competitive strategy, the true winners find their sustained success along a well-planned path. From my perspective, a fundamental approach will always serve us well.

To begin to pave that path to a competitive strategy one must truly understand the current market dynamics and how they are likely to change. Today's business world is filled with opportunities along with a healthy supply of threats. Here are a few pitfalls to consider:

- Many industries face hyper-competition, a dynamic not exclusive to the graphic communications industry. This drives different competitive behaviors.
- Companies are seeing unprecedented increases in their raw material and energy costs. Is this likely to continue or will new materials make the current business model obsolete?
- Competition from international companies is on the rise and shows no signs of abating.
- Accelerating technology shifts and buying habits could be forces working to turn your products into commodities.
- Seemingly irrational competitive pricing behavior is sometimes driven by internal needs. Is this likely to continue?
- Finally, ever demanding customers continue to want "more" from their suppliers all the way through the value chain.

If you are thinking "That sounds like my business," take heart in the notion that you are not alone. In fact, the difference in levels of success lies in how your company responds to these challenges. Choosing and sticking to a competitive strategy is key. Most importantly, be clear on your strategy and pursue it with certainty. Be on the lookout for the bumps in the road that will try to take you off course. Some common diversions include production-driven market behavior — make it and sell it any way, anyhow regardless of real profit contribution. A "fill the factory" strategy rarely offers lasting success. Also watch for



disconnects between senior management intent and the sales and marketing team behavior. These are your team members that have day-to-day contact with your customers and set the tone for your company's value proposition. How you address these distractions is what will keep you focused on your strategy.

The other classic book that comes to mind is "The Discipline of Market Leaders: Choose Your Customers, Narrow Your Focus, Dominate Your Market" by Michael Treacy and Fred Wiersema. Their advice was to choose your winning strategy and really focus your entire enterprise on living it. Customer intimacy, operational efficiency and product leadership are the three areas of strategy. Each requires a different approach and implementation plan. One key point to note is that while it is tempting to claim the high ground in all three areas, it is usually impossible to achieve all three. Know your strategy and implement daily is the mantra.

“The true winners find their sustained success along a well-planned path.”

Regardless of the short-term changes in the business, once you have chosen the right competitive strategy for your company, continue to follow that path. Regular testing and mid-course corrections will make certain that you remain in control of your business.

You will also build a clear expectation that properly positions your company in the marketplace. This should lead to more loyal and predictable customer relationships. ●

Trade Representative Viren Chhabra, and Professor Frank Cost, Associate Dean of the College of Imaging Arts and Sciences at Rochester Institute of Technology. Dawn Kawasaki of the U.S. Department of Commerce also accompanied the group. Also on hand for some of the mission activities were Indian representatives from NPES member firms, including Baldwin India, Xerox, Brandtjen & Kluge, Baumfolder, Presstek, Rosback Company, Multifeder Technology, and RBP Chemical Technology.

The mission began with a plant tour at the *Hindustan Times's* new production facility in the suburbs of Delhi. Cost notes the newspaper spent about US\$75 million on the new plant, which has been operating less than a year. Three new four-color newspaper web presses anchor the facility, capable of producing 265,000 24-page newspapers per hour.

In some respects, Cost says, the new plant reflects conditions throughout the Indian print industry. For example, *HT* says the new plant employs no "workers," but rather qualified engineers, and the plant's work force is not unionized. The suburban plant is linked to the main office in Delhi over a high speed network connection, and puts together four geographically zoned editions of the paper each day, with content that can be completely different for each zone. "The paper features full color on every page," Cost points out, "and the design and print quality are world-class."

THE SUCCESS OF THE NEW *HT* PRINTING PLANT illustrates some of the complexities and challenges of doing business in India for U.S. firms — and highlights the mission NPES has set for itself in this huge and promising market.

The *Hindustan Times* was able to buy state-of-the-art equipment from an international vendor after it received a government exemption from the prevailing 35 percent import duty on printing equipment. Such exemptions are available to Indian printing companies under specific conditions, tied to those

companies' ability to sell printing to foreign customers.

Although some specific rates have been trending downward, tariffs in general remain a key point of negotiation between the U.S. and India. "Domestic manufacturers of machinery want the protection of high tariffs,"

Success requires patience, persistence and people who really understand the Indian market.

Cost says. "In general the precision and product quality obtainable with (domestic) machines is lower than with imports."

In order to compete in global markets, Indian printers must meet global quality standards while delivering more attractive pricing. "A few commercial printers have purchased foreign equipment with the express purpose of serving export markets," Cost says.

The next morning, the group assembled, along with several hundred invited guests, to inaugurate the new NPES India Trade Center. The new center has been launched with initial financial support from the Market Development Cooperators Program of the U.S. Commerce Department, and was inspired by the highly successful Sino-U.S. Printing, Publishing and Converting Technologies Training Center created by NPES in Shanghai, China in 1997.

This is the latest step in the evolution of a strong relationship between NPES and the leaders of the Indian printing and converting industries. NPES staged its first formal visit to India in 1993, when the Fifth World Print Congress was held there. A series of formal trade missions

has followed, including NPES participation in major exhibitions in India and delegation visits from India to PRINT® shows in the United States in 1997, 2001 and 2005.

The new office "will be a central source of information for Indian printers about U.S. products, as well as a place at which NPES members can stage meetings, offer technical training, and do many of the other ordinary, day-to-day things that a healthy trade demands," Hurley told the audience at the ribbon-cutting ceremony.

The center will

also host a new website through which both vendors and prospective customers will be able to access extensive information about products, distributors, dealers and technical subjects.

Hurley also reported that NPES will continue to work with the U.S. Commerce Department to improve access for American companies to the Indian market. This effort will include USA Pavilions at future trade shows, with special attention to the technologies of small and medium sized companies who might otherwise remain unknown to Indian prospects.

SPEAKERS AT THE OPENING CEREMONY also addressed the issue of tariffs on imported printing equipment. Chhabra observed that current Indian government policies encourage the import of used equipment, and this handicaps Indian printers who want to compete in world markets. "We are a dumping ground for second-hand equipment because of our tariff policies."

Delmontagne also stressed the need for changes in tariff policies, noting that even though tariffs have been declining for several years, they remain too high. Individual companies are often able to obtain government preference for imports of specific machines, but in general India does not have a rational

The NPES booth at Print 2006 International was a hub of activity.



Photos for India feature by Frank Cost

and strategic approach to tariff policy, he said.

Goss's Tim Mercy provided a detailed comparison of the technology import policies of India and China, noting that the Chinese government has made it much easier for companies to import foreign equipment. Indian laws, Mercy said, do not sufficiently distinguish between technologies that compete with domestically produced systems and those that do not. In areas where Indian manufacturers do not produce competing technology, it makes little sense for the government to impede imports of foreign machinery, Mercy commented.

Pantone's Loretta Vaz encouraged U.S. companies to demonstrate the importance they attach to the Indian market by dealing with it directly from the highest corporate levels. "The Indian market is different and therefore requires a unique approach with reference to marketing, advertising, distribution and so on." Further, Vaz notes that "India is a fully developed market with most global players already having a very strong presence. Given the tariff structure, a pricing model specific to the Indian market has to be evolved."

NPES can play a key role in helping companies evolve such a well-informed and flexible approach to the Indian market, she adds. "NPES offers a unified forum for American companies to make their initial entry into the Indian market place. NPES, together with its Indian office, can help American companies identify appropriate partners in India more effectively. This trade mission helped to bring together the appropriate audience for American companies to interact with directly. It also helped send a clear message about the desire and willingness of American companies to play an active role in the Indian printing industry."

The trade mission traveled from Delhi to Chennai, where several member companies took part in the USA Pavilion at eAge Print 2006. The NPES group also helped stage the "American Day" conference at the show on February 12, with several technical presentations by participating companies, business presentations by NPES speakers, and an NPES-hosted reception for Indian industry leaders.

"India wrestles with many of the same market and technology pressures that affect industry participants in other parts of the world," NPES International Trade Director Michael Hurley said at the conference. "It is reasonable to think that all of the major trends shaping the business environment for print today are driven by advances in technology."

Technology is also key to the successful emergence of new players in the international marketplace, he added. "India has committed itself to delivering world class quality and service in print at highly competitive prices," Hurley said, "and



The Xerox stand at Print 2006 International was close to the NPES stand and was constantly mobbed.

maintaining technological currency is central to achieving this goal."

ONE AREA IN WHICH INDIAN companies are trying to seize a major business opportunity is in outsourcing of key prepress and related functions by major American firms. Major firms like R. R. Donnelley have been directed to seek out these offshore opportunities to save money on technical functions.

"The biggest challenge," Cost says, "is to find a way to scale the business up fast enough to satisfy the demand of large customers." The trade mission group, for example, visited one firm that has been approached by a number of large Business Process Outsourcing companies for subcontracting work, but the volume requirements are too great.

Cost also stressed that the trade mission was able to visit several impressively modern and competitive facilities. "The top newspaper and commercial printing companies are comparable to the best companies anywhere in the world," he says. "However, we have been repeatedly reminded that the vast majority of companies are not like the ones we have visited. Many are in need of more basic technical education that will enable them to improve the quality and productivity of their businesses."

One particular handicap to many printers, and an area in which U.S. partners can offer help, is in developing the workforce India needs, through education and training.

Reaching out to a large number of smaller printing companies in India is

one of the objectives of the ongoing NPES effort to build relationships with India's industry associations, Marx says. "One of the primary ways we can help these smaller shops is by working with their trade associations and communicating with them through that channel. There's a real opportunity for them to utilize North American technology to serve world markets."

NPES, along with such partners as RIT, can use these association alliances to bring real value to the Indian printing industry and expand sales opportunities for member companies, trade mission participants agreed. Marx notes that in addition to tariffs and regulatory trade barriers, the Indian printing industry recognizes that such basic infrastructure issues as reliable electric power must be addressed.

"Nothing happens overnight," she says. Flint Group, in particular, has been active in India for many years. "Success requires patience, persistence and people who really understand the market."

*The new NPES facility is located at:*  
PHD House, 4th Floor  
4/2, Siri Institutional Area  
August Kranti Marg  
New Delhi 110 016  
Phone: +91-11-4165 4714  
Fax: +91-11-4165 4713  
Email: vchhabra@airtelbroadband.in  
Website: www.npes.in

*The Commerce Department publishes a guide to doing business in India, which can be downloaded free of charge at <http://www.buyusa.gov/india/en/ccg.html>.* ●

# Membership Points of View

This month, four executives at NPES member companies share their views on the theme *"What traits are demonstrated by your most successful customers?"*

## Dave Klein ▶

*President, NELA Termes*

"My most successful customers all demonstrate real decisiveness and understanding of what they want in a capital expenditure situation. They've done their homework; some have put together a specification sheet for the project, which they share with potential vendors.

"These customers are up front about their expectations, and they understand what is involved in a major capital purchase. They realize it takes time to sort out specifications, design and build machinery, as well as installing it. These customers also do contingency planning to compensate for the unknowns. And they have realistic performance criteria when it comes to acceptance of machinery.

"They exercise the same openness with their customers, because they need to know what the customer expects in terms of the quality of the product, the price, delivery, and so on. Clear and concise communication is the key to any business relationship. It's so simple when you understand each other."



## Dwight Kelly ▶

*President, Apago*

"Our best customers are the ones that are not risk-averse, who are not afraid of technology. They're willing to put the effort into assembling their own systems, rather than buying everything from one vendor. They are successful because they participate in the industry, are active on industry and international standards committees, participate in forums, both online and at trade shows. They try to have their finger on the pulse of what's going on both inside our industry and outside.

"You have to be willing to say 'This is the direction we need to go and we're willing to be the first ones to go there if need be.' Being beholden to a single large vendor is too restrictive.

"A large printer may be able to go to their vendor of choice and say, for example, 'We see a market for a very large platesetter; if you build one we'll buy it.' Small to medium shops don't have this option. They have to be willing to take pieces and parts from multiple vendors and put them together into a customized workflow.

"Successful companies also have to invest in training programs."



## Neal Nordling ▶

*President, Multifeder Technology*

"One thing is a willingness to share the true objectives of a project and take you into the process early, instead of waiting for the last minute. Some customers are reluctant to go into this planning process until one of their customers comes in with a P.O., and then they think they can go out and make a major capital investment quickly.

"Everybody wants to move fast, but you have to sit down and ask the right questions, and think the whole project through in a mental state in which you can consider possibilities. These smart customers are also the ones who have a vision of where their business is going. They're willing to plan and to commit to invest in the equipment they see as valuable in the coming market.

"A great deal of technical interchange is possible if the customer is willing to be open and to share."



## Wayne Wasulko ▶

*President, RIPit Imaging Systems*

"The major trait I see in my most successful companies is that they take care of their customers first and foremost. They make sure they are delivering, in both products and service, something that's above and beyond the 'call of duty'."

"A lot of our customers are small quick printers to medium sized commercial printers, and their customers are expecting faster turn-around with better quality. Those who can deliver this quality are the ones who will stay busy, and those who can't will have difficulties for future growth. This is where our customers have the opportunity to grow, in delivering fast high-quality products."

"Our best customers are the ones who treat their customers the way they would like to be treated themselves."



If you'd like to participate or recommend an upcoming theme for *Membership Points of View*, contact the editor at [dsprei@npes.org](mailto:dsprei@npes.org).

# One on One:

## Joe Truncale

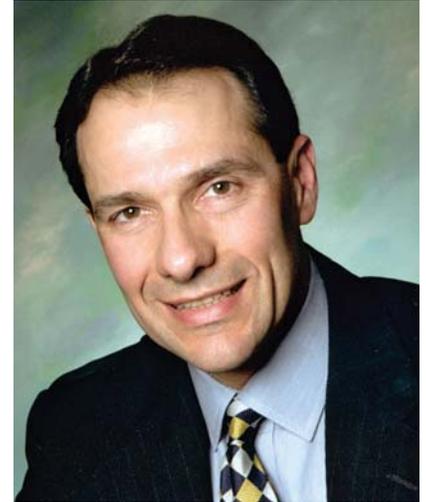
**As President and CEO of the National Association for Printing Leadership, Joe Truncale covers a lot of ground visiting and consulting with print company leaders from among the thousands that make up NAPL's constituency. We caught up with Joe last month to get a reading on issues that engage him these days.**

*When you think of the most progressive businesses in our industry, particularly among the membership of NAPL, is there a distinguishing characteristic they share?*

One of the common traits I see among the most progressive printers – and fortunately we get to count some of our best members in that category – is that they really make an effort to know their customers. I'm not talking only about sales or customer service people. I mean the principals of the company make it a point to understand what their customers' business objectives are, what is it they are trying to accomplish, and how to help them

that leaders and executives get involved too at a higher level to talk about business strategy.

That does a couple of things: It spreads out the ownership, if you will, to more than just one person; and it also demonstrates to the prospective client that this is a full service communications company that we're dealing with here that really wants to have a stake in our success. We're hearing more and more of our members approach it that way.



*What can manufacturers and suppliers do to be better partners with their customers?*

I know this goes on elsewhere, but it would be hard to imagine another industry where manufacturers and suppliers invest so much in their customer relationships and genuinely feel and act like they have a stake in the success of their customers. Many manufacturers will be at our top management conference next week, mostly to find out what their customers are paying attention to. You won't hear product pitches from the podium at all. Instead there will be a robust discussion on business trends, where the industry's headed, technology applications that work for the customer, and how printers can take advantage of them. The manufacturers and suppliers who are invited to these events realize it's a great opportunity to be in front of a group of people and get into dialogue at that level.

*Do you have a perspective on promoting innovation in this industry?*

There's a saying that I like to use: "Conventional wisdom is an oxymoron." You find a certain warmth and comfort in doing what everyone else does, and won't be criticized for making the safe choice or conforming to expected norms. But when you look at companies that are really setting the pace, it's the innovators. Innovation is always a requirement for companies that really want to grow – and it's a process; not just somebody coming up with a good idea once in a while. And so the questions I ask our members all the time are:

"Tell me about your process for innovation. Do your employees know what to do if they have a good idea? Where do you applaud some level of risk taking, or fund things that may seem a little offbeat, and do you look for information and ideas in non-traditional settings?

Do you have brainstorming sessions and a process for facilitating them?" Those types of things... and for heaven's sake, don't just say you have a suggestion box! ●

get that done. The whole idea is tied to expressing sincere interest. There's nothing perfunctory about this.

As our members start to branch out into other product line or service extensions past the core business, when you ask them why they did it, just about every time the answer's the same: "Our customers took us there. Our customers were asking us to do this." And what happens many times is by adding these other related business units or capabilities, we're also finding that it's not replacing print – in fact, quite the opposite. It drives, oftentimes, additional print volume; and/or it changes the nature of the print relationship.

*How does this play out in terms of the sales relationship? Print salespeople have long been a pretty traditional bunch, as you well know.*

We're seeing more and more companies look at things like team selling – where the account exec obviously plays a significant role – but now a team will come in and look at the business objectives as well as technical issues. At some point, we recommend

“Innovation is always a process for companies that really want to grow.”

# news and notes



## PACKPRINT 2007 EVENT: A DYNAMIC NEW OFFERING FOR NPES MEMBERS

PackPrint<sup>SM</sup>, the new package printing and converting exhibition being organized by GASC with the support of the Flexographic Technical Association (FTA), will offer NPES members the same advantages and benefits they have traditionally enjoyed at GRAPH EXPO<sup>®</sup>, CONVERTING EXPO<sup>®</sup> and PRINT<sup>®</sup> shows.

PackPrint will take place September 9-12, 2007 at McCormick Place, Chicago, Illinois, directly across the Grand Concourse from GRAPH EXPO 2007. A single attendee badge will provide admission to both big events.

NPES members can take advantage of the long-standing program that offers a savings on booth space rentals up to the amount of a company's Association dues. These savings will be available for booths in PackPrint as well as GRAPH EXPO. The NPES member lounge will also be in operation to serve member/exhibitors in both shows. The lounge offers a comfortable place to meet, relax, and obtain refreshments away from the bustle of the exhibit halls.

PackPrint is designed by GASC and FTA to meet the technology needs of package printing, which is one of the main growth segments in today's printing and graphic communications industry. It will address all kinds of package production and offer the year's largest collection of equipment in actual operation, doing real jobs.

The show will be aggressively promoted to package printing

professionals. NPES members who have exhibited in GRAPH EXPO over the years and have products applicable to package printing sectors may want to consider expanding their displays and adding equipment to take advantage of the broader audience that will be drawn by the two co-located exhibitions.

PackPrint provides an opportunity to show and demonstrate all the latest equipment and supplies for creating, printing and finishing the full range of product packaging materials, from shrink sleeve labels to folding cartons to tags and self-adhesive labels, and RFID.

GASC plans to distribute the Exhibitors Prospectus for PackPrint this spring. Companies signing up early can take advantage of another incentive: They can secure a prime location, and won't have to make a payment until August 2006.

Additional information about PackPrint will be posted throughout the coming months at [www.packprint07.com](http://www.packprint07.com).

## PERSONALIZED INTERNATIONAL DEALER DATA SERVICE NOW AVAILABLE

Are you looking for dealers to sell your products overseas? The names of country-specific, print-industry dealers are now available to members in *Excel* spreadsheets. The document is based upon 354 dealers from 54 countries that registered for PRINT<sup>®</sup>05 last year. It includes dealer sales volume, product interest and contact information. Members can obtain this information by contacting International Trade Data Specialist **Saranga Senaratna** at 703/264-7200, or e-mail [ssenaratna@npes.org](mailto:ssenaratna@npes.org).

## POSTAL REFORM BILL PASSES SENATE: CONFERENCE WITH HOUSE NEXT STEP

In an important victory for NPES and the printing and mailing community, Postal Reform Bill S. 662 passed the U.S. Senate in February under a Unanimous Consent agreement with no recorded vote, clearing the way for a House/Senate conference on the legislation to reconcile the differences. NPES is a member of the Coalition for a 21st Century Postal Service, and has worked to advance reform legislation that will keep the USPS viable as a major disseminator of printed material in the future. For more information contact NPES Government Affairs Director **Mark Nuzzaco** at 703-264-7235, or e-mail [mnuzzaco@npes.org](mailto:mnuzzaco@npes.org).

## QUARTERLY JAPANESE MARKET REPORT NOW AVAILABLE

According to recently released financial statements by Japan's three largest printers, sales are up but profits are down because of stagnant prices caused by competition. As normal offset technology enters the maturity stage, companies are having difficulty distinguishing themselves from one another. For more information about these and other factors affecting the Japanese print market see, Japanese Market Report 4th Quarter 2005 in the Members Only section of the NPES web site, <http://apphost.infosrc.com/npes/closed.html>.

## PESKO TO SPEAK ON INDUSTRY TRENDS AT SPRING MEETING

**Charles A. Pesko** will speak at the Spring Meeting, March

23-25, Loews Ventana Canyon Resort in Tucson, Arizona, on industry trends. With over 30 years of industry experience, Pesko has provided research and consulting services for virtually every major player in the worldwide electronic printing and electronic imaging market. Pesko was the Founding Publisher of *Print On Demand Business* magazine, as well as the founder and chairman of *Imaging World* (now *KM World*) magazine. He is a past Chairman of the Statistical Committee for the Graphic Arts Marketing Information Services (GAMIS) and is frequently quoted or published in industry trade magazines and leading business publications, including the *Wall Street Journal*, *The New York Times*, and *Business Week*.

There is still time to register for the Spring Meeting. Program and registration materials are available online at [www.npes.org/conferences/index.html](http://www.npes.org/conferences/index.html). Call the hotel directly at 520/299-2020 for room reservations. For more information contact **Irene LaBranche** at 703/264-7234, or e-mail: [ilabranche@npes.org](mailto:ilabranche@npes.org).

**NPES News is published monthly by the Marketing and Communications team at NPES.**

**Managing Editor:**  
Doug Sprei (703) 264-7215

**Correspondents:**  
Keith White  
John McKeon  
Mark Nuzzaco

**Circulation:**  
Darcy Harris (703) 264-7200



*The Association for Suppliers of Printing,  
Publishing, and Converting Technologies*

1899 Preston White Drive  
Reston, VA 20191 USA  
(703) 264-7200  
e-mail: [npes@npes.org](mailto:npes@npes.org)  
[www.npes.org](http://www.npes.org)