



# news

THE ASSOCIATION FOR SUPPLIERS OF PRINTING, PUBLISHING AND CONVERTING TECHNOLOGIES

## Content-Rich Annual Conference Explores '21st Century Economics'

**N**PES members attending the 2006 Annual Conference in Ponte Vedra Beach, Florida last month were treated to a business-intensive agenda featuring more speakers and ultra-current content than any previous event has afforded.

With guidance from the Association's Programs and Meetings Committee – **Bruce Goodwin, John Stewart, Steve Fullerton, and Elinor Midlik** – the Conference program was designed to engage members in lively dialogue with an array of industry leaders assessing and driving new business models of print.

The program was enhanced by outstanding representation



from the printing company community. An interactive printer panel discussion, featuring three executives assembled and moderated by **NAPL's Joe Truncale**, was complemented by presentations by leaders of two highly successful firms: **VistaPrint** and **Padgett**. The ensuing dialogue between printers and members of the manufacturing community was considered by many attendees to be a highlight of the conference.

Kicking off the proceedings on Sunday, November 5th,

noted Futurist and Economist **Dr. Lowell Catlett**, Regents Professor at New Mexico State University, delivered his keynote address, entitled *21st Century Economics*. Combining macroeconomic perspectives with abundant humor and a storyteller's approach, Catlett entertained and inspired the audience with startling insights into global consumer trends. His outlook was far-reaching, yet accessible to all, thanks to an arsenal of examples from daily experience (iPod, cell phones, Starbucks, eBay, TiVo,

and many others). Catlett's portrait of the modern world depicts vast populations of consumers more empowered than ever before to decide what they want, when they want it, and at what price. Luxuries that were coveted by previous generations have become the routine necessities of today; the impact on industry is enormous; workforces become more mobile and differentiated; and countless opportunities arise that transcend geopolitical borders.

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# president's perspective

## A Direction for the Future

At the NPES Annual Conference in early November, attendees had an opportunity to hear from printers, economists, and other experts on adapting and evolving the business in our industry. During the meeting, NPES Chairman Tom Saggiomo and I gave reports to the membership. In the President's Report, I identified four key areas of focus during my first year as president:

- listening and learning from members,
- identifying key issues and challenges for the industry and the association,
- earning credibility and trust, and
- assessing NPES's key constituencies.

Time permitted an in-depth review of the first two areas during the presentation. Since becoming president, I've had the opportunity to visit over 20 member companies at their facilities and have met many more during industry shows and events. From those visits, the following key messages about NPES emerged:

- NPES can be the purveyor of data and research
- NPES is a filter for industry trends
- NPES can redefine the industry
- There is great value in networking opportunities
- NPES is the "Guardian of the Industry"
- NPES can define the marketplace differently

On the converse side, members identified some key areas for improvement:

- "We get too many mailings"
- "Be careful not to pigeonhole NPES"
- "We need to be a member-driven organization"
- "NPES needs a personality"
- "We must do a better job of leveraging our international offices"
- "There is plenty of room at NPES for better, cheaper, faster"

As many of you know, NPES committed to extensive outreach to members this year with a comprehensive member survey. Over 34 percent of our members responded, which was the best response we received in 10-plus years. Participants represented a broad cross-section of membership in terms of public and private companies and by number of employees. The results were very telling. In sum, they identified our most important services and programs, as reflected in Figure 1, below.

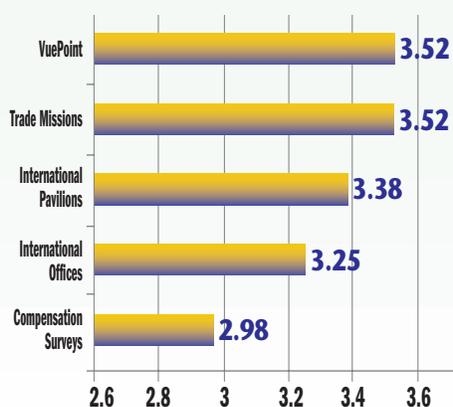
**FIGURE 1:**  
**Most important Services/Programs**



The survey also identified our least important services and programs (Figure 2, below), as well as the most requested new programs and services for the future (Figure 3, below, right).

It is important for you to know that NPES uses this data, has made major strides in eliminating and/or making adjustments to the

**FIGURE 2:**  
**Least important Services/Programs**



**Ralph Nappi**  
**NPES President**

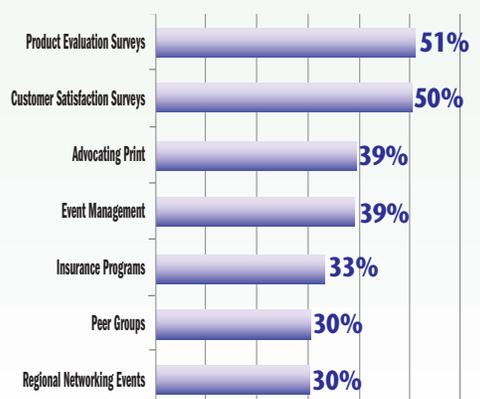
programs under the "least valued category," and is also leveraging our best programs. Further, some of the most requested new programs and services are now being offered or developed – including regional networking events, peer groups and insurance programs, just to name a few.

But why stop there? You can never have too much feedback when it comes to your customer base. That's why every NPES staff person has put in calls to the membership. To date, we have personally contacted 86 percent of our members . . . and we are committed to making that 100 percent!

During the calls, we asked a set of quick and easy questions, and we heard about key issues. What keeps members up at night is: growing the business, hiring qualified employees, keeping up with technology, and lowering operating costs.

If there was a most telling statistic, it was how likely members were to recommend membership in NPES to other companies using a

**FIGURE 3:**  
**Most Requested New Programs/Services**



1 to 10 scale (10 being absolutely would recommend). An impressive average of 8.3 out of 10 was realized; when asked why, members responded by identifying the respect NPES has in the industry; market data and research; and networking opportunities.

When we asked what NPES can do to assist, the most frequent response was to continue what we are doing. But we also were told that providing even better market data and research and offering more networking opportunities are important steps to take.

It has become clear through three different outreach opportunities and a series of strategic planning sessions what our industry's key trends and issues are for the future. Seven points were identified with great frequency:

- Consolidation
- Growth of digital technology
- Reallocation of advertising dollars
- Globalization
- Declining profitability
- Lack of skilled workforce
- Increased cost of doing business

Your board of directors and staff are using all of this information to adjust, manage, and evolve NPES. Among the broad actions from the harvest of this outreach over the last 12 months, the first is to *provide more content to you*, specifically by:

- leveraging Print Outlook and PRIMIR in a combined March meeting,
- increasing the utilization and readership of *NPES News*; and
- aligning and improving our international efforts.

A second area of major action is *increasing networking opportunities* by:

- hosting a series of regional meetings in January,
- the development of peer networking groups, and
- providing better and timely data and more research including the development of a worldwide digital marketing data program.

NPES wants to be your primary business resource and we will commit to be so in three ways:

- to be a strategic partner for your organization;
- to provide relevant programs to address your issues at both the operational level and strategic direction for the future; and
- to engage you in the direction and involvement in NPES because this is *your* organization.

Your feedback and involvement during this process has, and will, direct the future of our Association. Please keep these thoughts and ideas coming because they are vital to make NPES a relevant part of your company! ●



## to headline NPES Industry Summit March 27-28 in Chicago

The 26th edition of the printing, publishing and converting industries' foremost annual economic and marketing conference, Print Outlook®, will be held March 27-28 at the Fairmont Hotel in Chicago, IL. The conference will be held during the 2007 NPES Industry Summit, a three and a half day mega-event which combines Print Outlook with three other popular NPES meetings – the PRIMIR Spring Meeting, NPES Market Data Committee Meeting, and the NPES Board of Directors Meeting.

The theme for Print Outlook 2007 will be “**Print's Role in the Modern Media Mix**” and will feature an all-star team of graphic arts experts, including keynote speaker **Dr. Joe Webb**, who will take an insightful look back at 2006 and introduce his 2007 forecast for print and modern media. Also confirmed to speak are:

### *Hot Markets for Print in 2007*

#### **Vincent Mallardi**

Chairman, Printing Brokerage/Buyers Association

### *Outlook for Printing and Publishing in 2007*

#### **Dr. Ronnie Davis**

Chief Economist, PIA/GATF

### *Outlook for the Economy in 2007 & 2008*

#### **Michael Evans**

NPES Consulting Economist

### *Outlook for Commercial Printing*

#### **Joe Truncale**

President, NAPL

### *Outlook for Direct Mail*

#### **Dr. Peter Johnson (invited)**

VP Research and Market Intelligence, Direct Marketing Association

**New for 2007!** Print Outlook will introduce a special **Demand Specifier Panel** moderated by **Bill Esler**, editor of *Graphic Arts Monthly*. This provocative and interactive panel discussion will feature top industry print and media buyers, offering a fresh perspective on our industry and print's role in the mix of new communications.

**Who Should Attend?** Print Outlook is designed for *any* executive or manager who is interested in the future of the printing industry. Attendees will learn the facts about new and changing markets, growth rates, and the risks facing the print industry in 2007, as well as trends and forecasts needed to implement your company's strategies.

Apart from its array of excellent educational presentations, Print Outlook also offers unbeatable networking opportunities. Each year, the conference consistently attracts senior management from companies across the printing gamut who come to gather, learn and share their opinions.

**Mark your calendars now for March 27-28 and plan to attend!**

## New Board Members Announced

NPES announced the election of several new directors at its Annual Conference on November 6, 2006.

*Elected to terms expiring at the 2009 Annual Meeting were four new directors:*

**Michael Fox**, President of Screen USA

**Don Harvey**, Vice President and General Manager of xpedx Printing Technologies

**Marc Olin**, Senior Vice President and General Manager of Professional Printing Applications, EFI

**Thomas Wetjen**, Vice President of Worldwide Graphic Communications at Xerox Corporation

*Nominated for re-election to terms expiring at the 2009 Annual Meeting were:*

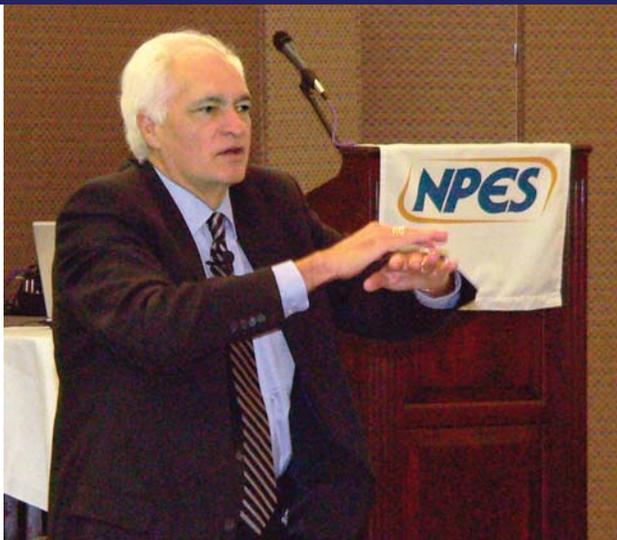
**Timothy Combs**, Vice President, Sales and Marketing at Fujifilm Graphic Systems USA

**Christopher Payne**, Director of Market Strategy and Business Research at Eastman Kodak Company

**Thomas Saggiomo**, President of Agfa Graphics

In addition, **Ulrik Nygaard**, President and CEO of Heidelberg Baumfolder Corporation in Sydney, Ohio, was elected to a one-year term expiring at the 2007 NPES Annual Conference.

**Ina Schlechte**, Vice President of Marketing at Prime UV was re-elected to a one-year term expiring in 2007.



Dr. Lowell Catlett

Immediately following the keynote, **Chris Connors** of **VistaPrint** took the podium and described his company's dazzling path to success. In practical terms accessible to anyone with a footing in our industry, Connors provided a compelling confirmation of Catlett's 50-mile high view. VistaPrint has succeeded in landing and satisfying seven million customers by empowering them to order print at any time of day or night – designed exactly as they want it, at extremely attractive price points. As Connors explained, VistaPrint's strong organic growth from quarter to quarter stems in part from its strong brain trust in marketing and I.T. staff who enable the company to attract, assemble and fulfill over 15,000 orders each day.

After a networking break, **Jeff Howard**, principal consultant of **The George Group** gave an in-depth exposition of the tenets and applications of Lean Manufacturing and Six Sigma as they apply in various industries as well as for printing equipment suppliers.

Howard's presentation was followed by the NPES Chairman's Report, in which **Agfa Graphics** President **Thomas Saggiomo** out-

lined some critical aspects of transformation our industry is undergoing. Modern printers are integrating their business models with return-on-investment strategies for their customers; new technologies (particularly those developed by NPES member companies) play a crucial role in bolstering efficiency and productivity to enhance the bottom line. Although print encompasses the fourth largest industry in the country, Saggiomo explained, productivity per employee currently ranks only 50th at \$125K per employee,

compared to \$1.46M per employee in the top-ranked automotive industry. New workflows and standards-based automation offer great promise in bridging the productivity gap. Most of all, printers must evolve from the role of traditional local or regional service provider toward becoming an integrated communications and customer-focused marketing business.

Following lunch, NAPL president **Joe Truncale** introduced a panel of three printing company executives: **Bill Woods** of the EPI Companies, **Joan Davidson** of Sheridan Press, and **Keith Kemp** of Xerographic Digital Printing. The ensuing conversation over the next two hours was multifaceted and engaging. After introductory remarks, the three leaders outlined the ways their organizations work to stay as close as possible to customers. "When they speak, we jump," said Kemp, offering up colorful personal anecdotes to describe his small digital print company's service model. A broad range of measures, including customer councils, personal visits, surveys, and objective interviews were some of the methods described by the panelists.

All three were emphatic about the need for detailed and sustained dialogue between printers and suppliers. "You want to be dealing closely with your vendor during the times when things are going well, rather than being forced to do it when they go wrong," Davidson said. Bill Woods said he personally eschews the term "vendor" altogether, preferring to think of his suppliers as partners or strategic collaborators.

Of great interest to conference attendees, the panel was unanimous in ranking industry trade



This year's Printers Panel: Bill Woods, Joan Davidson, Keith Kemp, and Joe Truncale.

## Modern printers are integrating their business models with return-on-investment strategies for their customers."

wellness trends by **Dr. Michael DeVault** of the nearby Mayo Clinic. A number of members and their spouses opted to attend this presentation, and commented favorably on it afterwards.

On Monday morning, international venture capital expert **Ravi Bhaskaran**, a partner at San Francisco-based Fog City Capital, described the meteoric rise of India and China and related implications for the printing industry value chain. Bhaskaran argued that in a world economy no longer driven by U.S. consumers, domestic business leaders must re-position and bundle their offerings to add value for the burgeoning populations of new consumers beyond our borders, as well as expand their thinking toward a global perspective when it comes to partnership.

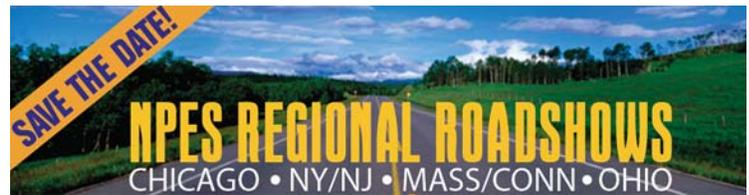
Next, **David Torok**, president of Dallas-based, **Padgett Printing** gave an illuminating description of his company's transformation from a 100-year old service provider to a digital/offset printing/mailing and fulfillment powerhouse. Under Torok's leadership, Padgett has grown from \$8 million to \$30 million in sales, through a host of measures: deployment of digital, CTP and workflow technologies, a cross-functional team selling approach, service that emphasizes ease of doing business for clients, brand awareness of its offerings beyond just ink and toner on paper, and strategic partnerships with suppliers. Of the top ten reasons he likes suppliers, Torok said, number one is that "you really care about our success."

Following Torok was NPES president **Ralph Nappi**, whose key points in addressing the membership are outlined on pages 2 and 3 of this newsletter. Afterward, **Philip Kuehl**, senior staff consultant at Westat, wrapped up the day's program by outlining his vision of four essential factors for organizational success in a changing economy.

Since the conference's conclusion, a healthy number of attendees have provided encouraging, thoughtful feedback, and their enthusiasm bodes well for future sessions beginning with next November's NPES Annual Conference at Rancho Bernardo in San Diego. ●

shows such as GRAPH EXPO as hotbeds of opportunity for industry networking, lead generation, education, and guidance for making purchasing decisions.

Sunday's session was capped off by an engaging and well-received "extra-curricular" presentation on health care and



## NPES is coming to you!!!

NPES will conduct a series of day-long regional meetings in January, providing focused industry-customer dialogue, a spotlight on selling strategies for the vendor community, valuable market data, and great networking opportunities.

These meetings will include a continental breakfast and full lunch, and will run from 8:30 a.m. to 2:30 p.m. in these regions:

- **January 17: Chicago, IL**
- **January 19: Teaneck, NJ**
- **January 24: Hartford, CT**
- **January 26: Dayton, OH**

**Cost: \$150**  
(\$95 each additional)  
*Includes breakfast and lunch*

### PROGRAM HIGHLIGHTS



#### Printers Panel

An interactive panel of printing company leaders from your region will share expert insights on the marketplace. You'll dialogue with them on what's driving their investments in new technologies, and what they need from the vendor community to thrive in a changing graphic communications world.

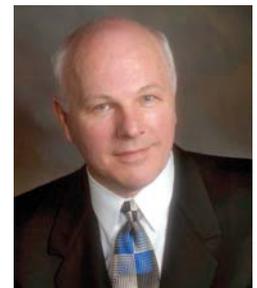
#### Sales Skills for Everyone

*Supercharging Your Sales Organization to Win and Keep Customers*

Sales is the engine of success in business, and everyone in your organization – from the CEO to the company receptionist – has a stake in selling. Renowned consultant

**Carl Henry** teaches a system of sales skills that **everyone** in your company can benefit from. Carl's Modern Selling System

shares steps and strategies for sales success, imparting a common language and set of dynamic processes that can unite every member of your team around a vision of winning new customers and keeping them close.



#### NPES Townhall Meeting

Rounding out the agenda will be updates on the latest **Market Data** findings from NPES and PRIMIR®, and a report on NPES' new **Strategic Planning Initiatives**.

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FOR MORE DETAILS TODAY!**

**A Busload of Content is Coming Your Way!**  
Check your mailbox soon for location and details.



# Printed Electronics: SHORT TERM HURDLES; LONG-TERM WINDFALL

Looking for the “next big opportunity”? When it comes to printed electronics, that opportunity isn’t right around the corner, but experts agree that major rewards are in store for investors and developers who take a long-term view of the technology. Over the next two decades, experts agree that the industrial world will undergo a transformation that many printers and their suppliers will likely have a major stake in.

The field of printed electronics, while still in early stages, is drawing serious attention – and sizable investments – from an array of major technology companies around the globe. Taking the form of smart packaging, electronic billboards, posters, signage and electronic books, this emerging technology promises to impact the conventional printing and publishing industry in a big way.

According to a just-released report from Glen Allen, VA-based NanoMarkets ([www.nanomarkets.net](http://www.nanomarkets.net)), the market for printable electronics

Meanwhile over the past year, the equipment used for printing electronics has been able to produce higher resolutions, facilitating the production of low-cost RFID circuitry, mobile displays and multi-functional sensors. In addition, the printable electronics community no longer sees registration as an insurmountable obstacle to printing complex circuitry.

Printed electronics – from RFID devices to printed circuit boards – have been drawing increasing attention from printers in recent years because of the prospect that some familiar contemporary commercial printing technologies and tools can be adapted to produce these high-demand products.

As a diversification path for commercial printers, printed electronics may offer as many complexities as opportunities. A single board may consist of many layers of circuitry sandwiched together and interconnected. A variety of print processes have been called into service to produce these electronics, including inkjet technologies, flexography, screen printing and photo imaging.

Some traditional prepress systems are finding new applications as imaging devices for printed circuits. The circuit photo-imaging niche “is one of the last bastions of film,” says **Don Ohlig**, Managing Director of **OLEC Corporation**, which has been pursuing the specialty since the 1980s. Ohlig describes the circuit imaging process as very high-end imagesetter, using imagesetters providing at least 4,000 dpi resolution.

Offset printers probably have imagesetters capable of doing the job, but the specialty poses a variety of challenges that may well deter many printers from even trying it. “With printed circuits, you’re dealing with huge etching tanks and tons of chemistry, with a lot of chemicals you have to dispose of and deal with on a day to day basis,” Ohlig points out.

The global demand for printed circuits is huge, but it embraces very low-end, inexpensive products as well as the most sophisticated and costly. Some American firms have had to battle low-price competitors to provide circuit boards for cell phones and consumer electronics. “At the entry level, the Chinese did undercut us,” Ohlig says. Sometimes, the answer is a joint venture with a Chinese partner, or a new manufacturing facility in China.

Some printers who would balk at the complexity involved in printing circuits are looking closely at opportunities in RFID. RFID devices consist of an antenna and an associated microchip that can contain both a processor and a power source, such as a battery. These components, particularly the antennas, lend themselves readily to commercial printing processes. With such major market players as Wal-Mart mandating ever-wider use of RFID tags, this market is growing rapidly, and the cost of producing individual tags is declining.

While the prospect of expanding into various forms of printed circuitry may be appealing for some printers, Ohlig offers a note of caution. “It’s a very cyclical industry,” he observes. “If you think printing goes through dips, it’s nothing compared to electronics.” ●

“As a diversification path for commercial printers, printed electronics may offer as many complexities as opportunities.”

(PE) will grow from \$354 million in revenues in 2007 to \$12.1 billion in 2011. Highlights of the group’s latest study:

Companies like **Intel** and **Siemens** have invested in PE or developed partnerships with printed electronics technology developers, as the field is viewed by more and more firms as their next \$100-million-plus annual business opportunity.

Key product segments in the PE business include printable displays which are expected to generate \$3.8 billion in revenues in 2011; printable RFID which are expected to surpass \$2.5 billion; signage which will create \$1.25 billion; printable backplanes which will grow to \$1.1 billion; and printable photovoltaics which will do better than \$1 billion in sales in the same time period.

Materials used in printable electronics will grow from a market of \$76 million in 2007 to over \$2.78 billion in 2011. In particular, there is a growing interest in developing inks using small-molecule OLED materials. If this proves practical, it will open up the entire OLED-display market – already worth hundreds of millions of dollars – to printing technology.

A number of ink manufacturers, such as **Sun Chemical** and **Flint Group**, have been seeing some success with electrically conductive inks.

# The 110th Congress

## ROAD BLOCKS . . . CHALLENGES . . . OPPORTUNITIES?

There is no denying that the election of 2006 was a watershed in U.S. politics. But rather than a major shift in political alignment, it would seem to be more of an adjustment in political power, the aftermath of which more accurately and realistically reflects the evenly divided nature of the American electorate. This condition has existed since the presidential election of 2000, and will likely persist into the foreseeable future.

For the past six years the Republican Party's control of both the executive and legislative branches of government has been disproportionate to the actual level of electoral support in the country as a whole. This year's election shifted the balance back to divided government, which is actually more the reality of the situation.

Before turning to dynamics of the 110th Congress that will be seated in January 2007, a few words are in order about the 109th. On the plus side of the ledger, NPES scored successes with the enactment of legislation that:

- extended IRS Section 179 small business capital investment expensing provisions through 2009;
- reformed the rules for Class Action law suits, thereby lessening the abusive practice of forum shopping for state courts sympathetic to questionable claims;
- extended the president's Trade Promotion Authority to negotiate trade agreements;
- approved the DR-CAFTA: U.S.-Central America-Dominican Republic Free Trade Agreement (DR-CAFTA), which re-affirmed the importance of trade and investment within the western hemisphere; and
- enacted Fax Ban legislation maintaining an organization's ability to communicate via fax with customers, suppliers, members, and others with whom it has "established business relationships." Additionally, the Federal Communications Commission issued rules to implement the provisions of the new Fax Ban law.

Unfortunately, other NPES government affairs priorities remain unfinished at this time and are unlikely to be completed during the "lame duck" days of the 109th Congress. These include Statute of Repose legislation and Postal Reform. The former was defeated when the House leadership

failed to advance H.R. 3509 to the House floor for a vote before the election recess; the latter ran into issues that stalled a House/Senate conference. The retroactive extension of the Research & Development Tax Credit, which expired at the beginning of the year, stands a better chance of success, but still remains doubtful.

The new 110th Congress will present roadblocks to some longstanding NPES government affairs priorities, and challenges to NPES and other business interests in certain areas. However, it might also offer opportunities that were not available under a Republican-controlled government.

In the first category of road-blocked issues, civil justice reform initiatives such as a statute of repose for liability claims on over-aged workplace equipment, lawsuit abuse, and medical liability reform legislation will find neither sympathy nor any interest in a congress controlled by allies of the trial bar. Regrettably, these issues will almost certainly be blocked during the 110th Congress. Even during the past six years of a much friendlier environment on Capitol Hill, they failed to succeed due to a Senate that was not filibuster-proof. The permanent repeal or lessening of the Estate Tax will also be difficult to advance in this new environment. Changes that can only occur at the ballot box will be necessary for these issues to have any vitality again in the future.

A divided government might overcome the "Not-Invented-Here" syndrome that so often causes those in the minority to block progress while those in the majority overstep their prerogatives to lead. Looking at divided government as a glass half full, the next two years may provide opportunities for both sides of the aisle to come to the center to make progress on major issues such as health care and tax reform.

Time will tell whether the 110th Congress will simply be a series of moves and counter-moves setting the stage for the 2008 presidential election year, or whether it will be a time for the outgoing Bush Administration to embellish a legacy of achievement, while the Democrat controlled congress builds a record of accomplishment. In either scenario, NPES's charge will be to ensure that the interests of its members and their customers are well represented in the crafting of public policy. And our ability to succeed in that charge will depend on the active engagement of the Association's staff with its members working together as a team. ●

## SAVE THE DATES

February 14 -15, 2007

Washington, DC

### TWO EVENTS:

- **NPES SEMINAR ON SELLING TO THE FEDERAL GOVERNMENT**
- **SPRING GOVERNMENT AFFAIRS COMMITTEE MEETING**

Planned in conjunction with the National Association of Manufacturers' Week in Washington: *72 Hours to Educate and Celebrate*, this innovative program will combine expert advice on selling to diverse buyers in the federal government with insights into the issues that will drive the policy agenda for the final two years of the Bush Administration and the 110th Congress.

### HIGHLIGHTS OF THE PROGRAM WILL INCLUDE:

- NAM's Congressional Awards Reception and Welcome to the Freshman Class of the 110th Congress
- Issue Briefing Breakfast with Vice President Dick Cheney (invited)
- Issue Briefing Lunch with Senate Majority Leader Harry Reid (invited)
- Special Briefings on NPES Government Affairs Priorities

Details and registration materials will be available soon. Contact NPES Government Affairs Director **Mark Nuzzaco** at 703-264-7235, or [mnuzzaco@npes.org](mailto:mnuzzaco@npes.org)

# PackPrint<sup>SM</sup> and GRAPH EXPO<sup>®</sup>

## A Full Spectrum of Business Opportunities – Under ONE Roof

GRAPH EXPO and CONVERTING EXPO 2006 was an unprecedented success, according to attendees and exhibitors who continue to reap the benefits of their participation in the show. 71 percent of surveyed attendees



said their primary reason for coming to the show was to investigate new products and technologies; more than 60 percent were

seeking equipment and supplies to move into package printing and they also came for education about new technologies and processes to enhance their plants' efficiencies.

The next generation of this essential industry event promises to be even more productive. Clearly, the time is right for a single comprehensive event that will deliver multiple solutions and connect two key audiences: 1) buyers and sellers of Package Printing and Converting and 2) the time-tested Graphic Communications audience.

PackPrint and GRAPH EXPO will be held Sept. 9-12, 2007 in Chicago's McCormick Place. The combination of these two shows, managed by the Graphic Arts Show Company (GASC) and proudly endorsed by the Flexographic Technical Association (FTA), also harnesses the full industry support of NPES, PIA/GATF and NAPL.

At these two events, attendees will enjoy one-badge access to

explore the full spectrum of package printing, converting and commercial printing products and services, all in one place – at one time. The main attraction for exhibiting companies is the opportunity to showcase their services and equipment for the commercial and package printing industries under one roof.

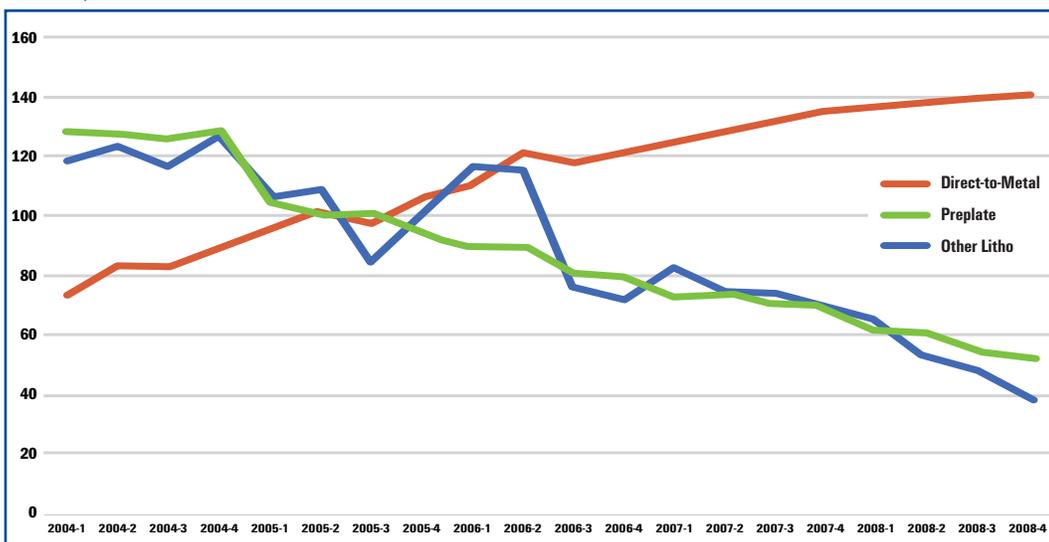
Mark Vanover, director of marketing for Esko Graphics Inc., is one of many exhibitors who has signed on for PackPrint. "We chose to exhibit next year because the focus and target demographics are those people we want to reach," he says. "While Esko had great success at GRAPH EXPO this year and attained our sales goals, thanks to the considerable presence of package printers and converters, we believe that with FTA's partnership, the co-location of PackPrint with GRAPH EXPO will do two things next year: attract more companies that are in the packaging markets, yet also attract those from GRAPH EXPO who are commercial print-oriented who want to explore packaging opportunities."

PackPrint's strategic location (North Hall), directly across the concourse from GRAPH EXPO in the South Hall of McCormick Place, will benefit attendees by breaking through the barriers of typical industry trade shows to provide "one-stop" shopping. Additionally, PackPrint's high quality education program will feature industry experts who will deliver immediate take-home knowledge on today's most timely topics.

For complete information visit: [www.packprint.org](http://www.packprint.org), or phone: 703-264-7200.

## Shipments of Direct-to-Metal, Preplate and Other Lithographic Plates

Millions of Square Feet



Direct-to metal plates continue to show healthy growth. These plates will continue to experience unit volume growth in the 6-8% range for the next two to three years, as the user base continues to expand into smaller printers and plates per job increase. Watch for the December 2006 issue of *MarketScan*, which will give you more information on the direct-to metal plates market as well as other major equipment and supplies product categories.

Source: Michael K. Evans and Neil W. Richards (for MarketScan December 2006 issue)

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