

Welcome to MAR...



ST. LOUIS POSTAL CUSTOMER COUNCIL



We help customers attract, serve and retain clients
via the print, mail & digital mediums .

AGENDA

- Welcome
- Industry Update: Paper, Print & Mail
- About MAR
- Tour
- Networking – light snacks and refreshments



MAR
523 S. Meyer Avenue

INDUSTRY UPDATE: PAPER, PRINT & MAIL

INDUSTRY UPDATE: Paper

- Paper – How we got here...
 - Fiber Demand, Covid Dive, Recovery Demand, Shipping Shortage, Ukraine
- Current Status
 - Uncoated vs Coated
 - Offset/Text Weight vs Heavy Weight
 - Rolls vs Sheets
- Future – operating rates, shipping, fuel cost, mills?
- Expect conditions to continue into 2023/2024, slowly improving during 2023

INDUSTRY UPDATE: Print

- Current Status
 - The US printing industry has declined an average of 2.5% per year between 2016 and 2021.
 - Current market constrained by material availability - longer lead times, delays and erosion/conversion to other channels
- Future and forecast
 - Market share held by digital printing is expected to increase 15.7% in 2017 to 19.3% by next year
 - Global digital printing market will increase 14% CAGR from 2019 to 2027 – \$17.2B to \$45.7B
 - The Inkjet print market is right now worth \$80.4 billion which is likely to reach \$118.2 billion in 2025
 - Drop on Demand Inkjet printers, such as print/personalization for direct mail and printing on cardboard, plastic, and packaging will increase

INDUSTRY UPDATE: Mail

- Current Status – generally 85% to 95% on time delivery for USPS services
- Online performance resources
 - <https://about.usps.com/what/performance/service-performance/>
 - <https://www.uspsoig.gov/service-performance>
 - <https://uspstools.maps.arcgis.com/apps/webappviewer/index.html?id=1fc1c26bb31246b39087606c65b83020>
 - <https://www.uspsdelivers.com/marketing/direct-mail-basics/>
 - <https://about.usps.com/newsroom/national-releases/2022/0804-usps-reports-steady-service-performance-across-all-categories.htm>

INDUSTRY UPDATE: Mail

ANA - Response Rate Report 2021: Performance and Cost Metrics Across Direct Media

ROI OF CAMPAIGNS BY MEDIUM

112 % – letter size mail to “prospect” list

102 % - SMS

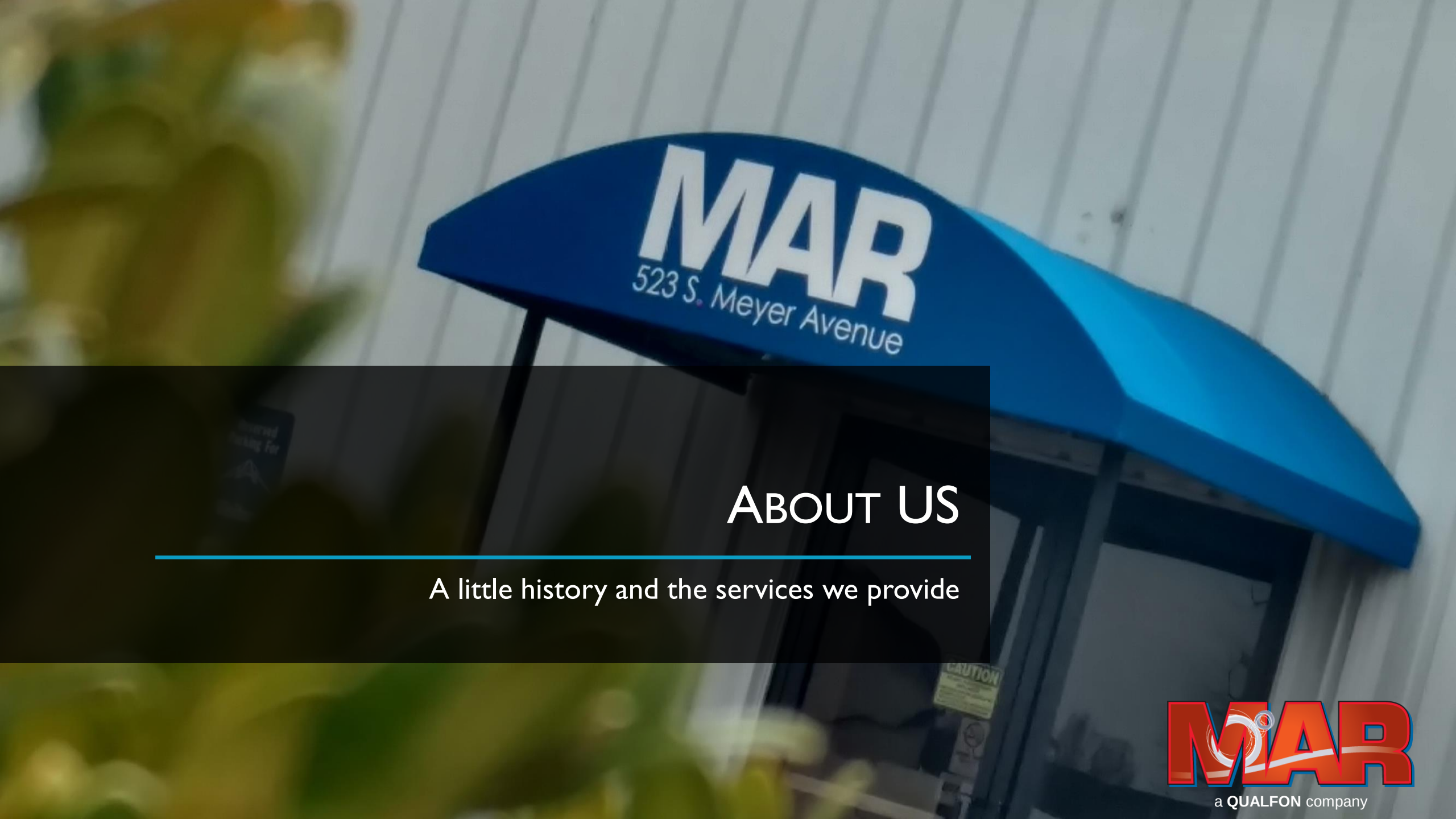
103 % - email

92 % - postcard mail to “house” list

Other notable formats to prospect lists include dimensional and oversized envelopes, both of which eclipsed 90 percent ROI.

INDUSTRY UPDATE: Mail

- Future and forecast
 - ID, CMM, TED-C, tactile mail, VR/AR integration, even more QR codes (more than 40% now)
 - Continued integration of mail and digital media - cross-platform
 - Work at home will continue to drive mail utilization (both marketing, biz and transaction)
- Postcards and self-mailers will continue to grow
- Possible federal privacy law... Introduced in June, the American Data Privacy Protection Act (ADPPA) has bipartisan support – will that effect retargeting? (tbd)



MAR
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ABOUT US

A little history and the services we provide



ABOUT US: A little history

In March of 1961, Myron A. Roever (M.A.R.) started a printing company in a garage in East St. Louis, Illinois. Over sixty years and four locations later, we continue to provide print and mailing services.

MAR, now a Qualfon company, has a staff of over eighty dedicated local employees with thousands more in our Qualfon family of companies. In our 60+ years of experience with radical market shifts, a recession and even a flood, our staff has a proven ability to meet challenges.

Located within the St. Louis metro area in Valmeyer, Illinois, MAR offers a wide variety of print and mail related products and solutions to clients, distributors, mailers, agencies and other customers nationwide.



ABOUT US: **Print services**

- UV Half-web Offset Printing
- Affixing & Integrating Interactive Elements in or on Print
- Digital Printing
- Print On-Demand
- Variable Imaging
- Forms Web Printing
- Web/Roll Finishing Including Pattern Adhesive

ABOUT Us: Mailing services

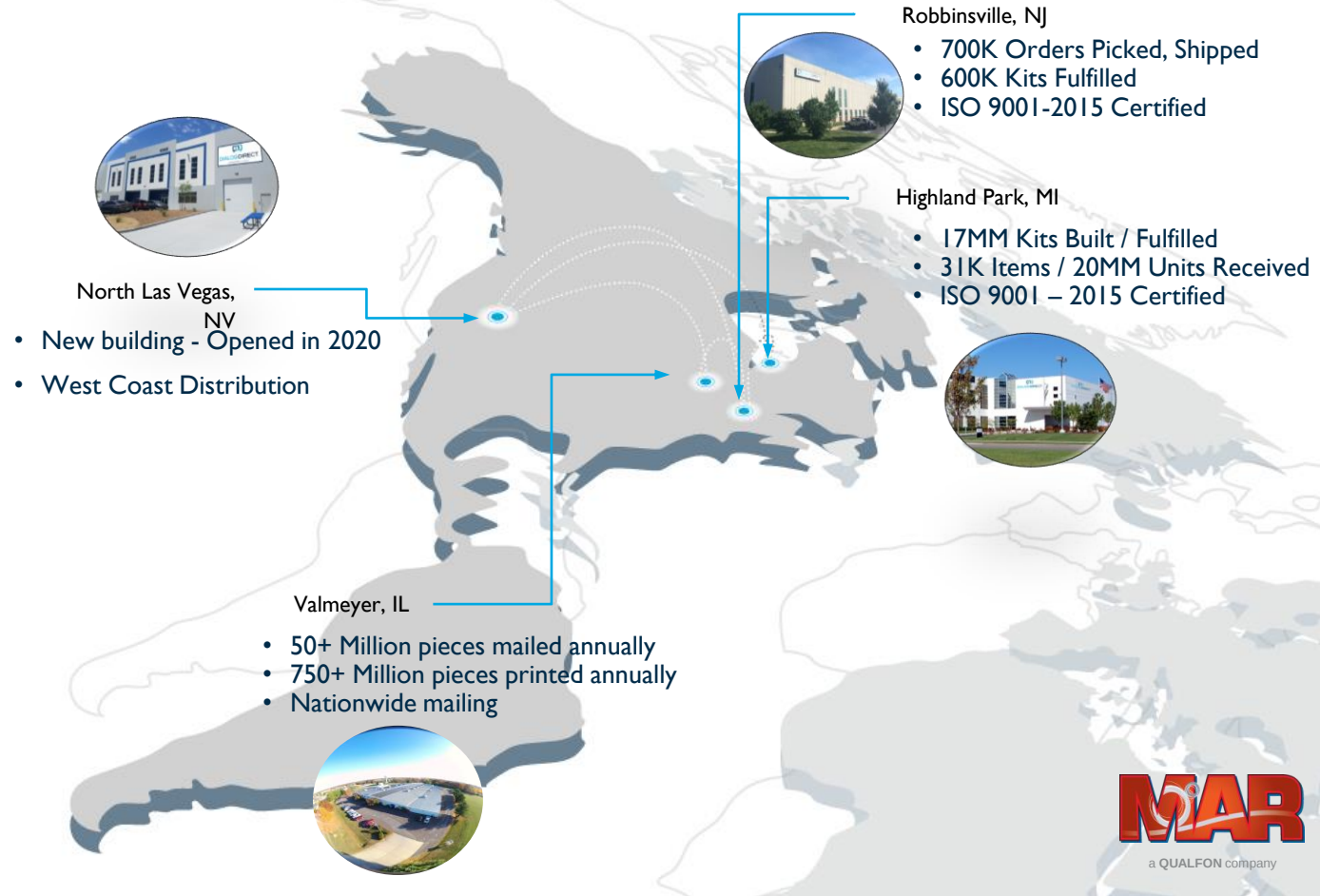
- Full Service Lettershop
- Invoicing & Billing Mailings
- Low to High Frequency Mail Programs
- CASS, Move Update and Data Appending
- Data Prep and Acquisition
- In-Plant Verification for NDC / SCF Drops
- Dynamic Variable Mapping

ABOUT US:

Other services

- PURL & e-mail campaigns
- Kitting & Fulfillment
- Thermo-ink & Specialty Security Inks
- Security Papers
- Micro-Print and Pantographs
- Roll finishing & bindery





OPERATING FOOTPRINT

1 4
Locations

2 900,000+
Square Feet

3 50,500
Pallet Locations

4 1.5+ Billion
Impressions Annually



THE DETAILS

A brief listing of the products we provide and the tools we use



a QUALFON company

OUR PRODUCTS: A wide array of solutions

- Jumbo Rolls, 1-10 colors up to 50" O.D. rolls
- Secure Checks, Certificates, Transcripts, Coupons & More
- Integrated and Affixed Elements
 - Cards, Coupons and Decals
 - Labels, Static Cling and Scratch-off
- Pressure Seal & Adhesives
 - Standard and Custom Fold Patterns
 - Snap-Pack Style Mailers
 - Peel-n-Reveal Panels
 - Remoist adhesive
- Direct Mail – Acquisition and Retention Mailings
- Postcards, Self-Mailers and Insert Mailers
- PURL & e-mail campaigns integrated with mailings
- Political mail (campaign and voter mail)
- Lettershop
 - In-plant verification and DDU drop shipping
 - Mail tracking, Informed Delivery & Informed Visibility
 - EDDM and Customized Market Mail
 - Match mailing and read/spray mailing

OUR TOOLS: A toolbox with many options

Variable Imaging Systems

- Ricoh Pro VC full-color inkjet web press
- Full color digital print engines (sheet-fed)
- B/W lasers, roll and sheet-fed
- Inkjet imaging systems (monochrome)

Offset Print (static)

- Müller-Martini 10 & 6 color UV half-web presses
- RDP Marathon 5 color UV half-web presses
- UV half-web offset presses, 6 to 8 colors
- Narrow web conventional presses, 2 to 5 colors

Bindery and Lettershop

- Hunkeler Variwebs (glue&dry or patch applicators)
- High-speed inserters w/ camera matching and intelligent insert
- Forms collators, Folding, Padding, Booking
- Saddle-stitch and Perfect binding (short run)



a QUALFON company

MAR TOUR

The Do's and Dont's

MAR TOUR: A few rules and notes...

- Please stay in the aisles unless accompanied or directed otherwise
- Please keep hands (really your entire body) away from moving equipment
- No photos or videos
- Please stay in your group at all times (MAR staff escorts are required)
- Bathrooms are by the front door

Thank you

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Print, Mail & Digital Solutions

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