

# PNL Publishers' Newsletter

PAPER SUPPLY CHAIN

COMPANY UPDATES

PLACES WE SELL

AWARDS

DIGITAL CONNECTIONS

MYBOOKS HELP VIDEO

A photograph of an older man with a mustache and a young child sitting on a wooden park bench. They are both wearing blue tracksuits and are looking at an open book together. The background is filled with trees with vibrant autumn foliage in shades of red, orange, and yellow. The scene is captured in warm, golden-hour light.

FALL 2021

## PNL Intro

By Doug Symington-General Sales Manager, Director

It is a beautiful fall day as I look out my window and write this; however, when you read this issue, we will all be getting ready to enjoy the holiday season. This holiday season will see a return to some normalcy, gatherings, and travel. Perhaps the gatherings won't be as big and the travel not as far, but it truly does seem like there is a light at the end of the tunnel.

2021 has simply been a year with many challenges. We navigated through the peaks and valleys of a pandemic, and now with the added pressure of ongoing supply chain issues and record demand, we have asked both our staff and customers to keep up at an incredible pace.



Thankfully, both our customers and staff have risen to the challenges. Our staff have been putting in an incredible number of hours and delivering a record number of books. We have asked our customers to work with us in planning work farther out, and they have also responded. The result is that we are seeing record loading well into next year. We are continuing to plan for and purchase materials as far out as we can and as much as we can. We are trying our very best to mitigate any supply chain challenges that our customers might feel. The good news in all this is that while we are asking you to plan farther out, when the files come in we have been able to deliver books largely on time and in the numbers needed.

With both increased demand for print products and some suppliers realigning product offerings, we have seen unprecedented price increases in raw materials. These

increases have been frequent, and just when we think we have seen the last one, another round comes through. We believe at some point this will level off, but likely not until well into 2022.

The last part of the supply chain that affects our customers is trucking. Much has been written and broadcast about the backlogs at ports and warehouses. Thankfully, through long-established relationships, we have not had issues with moving books out the door, and your long-range planning has helped greatly with this.

We have talked with key customers, and the forecast for increased demand does not seem to be letting up. This is the time of year that our board meets to discuss capital needs and approve plans for 2022. We are not yet ready to share final details, but more press and binding capacity are being considered, and final details will be firmed up shortly. Our intent will be to approve projects where the impact will be felt quickly.

So, while 2021 was a challenging year, we cannot lose sight of just how rewarding it was for both us and our customers. We saw incredibly diverse and beautiful projects roll through our plant; the diversity is reflected in our customer base from big to small and all sizes in between. Not a day goes by that I don't reflect on the business of books. Printing and publishing—perhaps more than any other industry—have shown an amazing resiliency to adapt to the reality of what the market throws at them.

So, to all of you from all of us here at Friesens, enjoy the holidays, and take a moment to pause and reflect on what a great industry we all are part of.

Happy holidays!



## Corporate Update

By Chad Friesen, CEO

Throughout this newsletter, you'll read how busy we've been at Friesens this year. Not everyone is thriving in this market, but many customers are achieving record sales, which translates into record orders for Friesens. The words of our founder, D. W. Friesen, have never been truer: *"We will be successful if our customers are successful."*

As you know, to succeed in business, you must be smart, you must work hard, and be a little lucky. Just ten years ago we were concerned about the future of our book businesses and our stakeholders. But while other companies left the market, we continued to invest. We have poured more than \$80 million into upgrades, automation, and capacity since then. Looking back today, if we hadn't placed those bets on the book business, we wouldn't be able to respond to the sharp increase in demand we're experiencing today.

Even though we're feeling great about the business right now, it is not without some significant challenges.

Supply chains have been disrupted all over the world, leading to shortages of many raw materials and basic services. While it hasn't been easy, for the most part we have managed to receive most materials just in time for production. This is not accidental or lucky. It is the result of the hard work of our purchasing team and strong vendor relationships that were built over years of treating our supplier partners fairly, being a consistent customer, and paying our bills on time. While some companies are turning away orders due to shortage of supply, we've been able to maintain orders, albeit on extended schedules.

Like most businesses, we are struggling to hire enough people to sustain our current growth. This is not unique to Friesens, or to Canada for that matter. Many manufacturers were short-staffed before the pandemic. The problem was compounded by health orders, stay-at-home subsidies, stiff competition for people, and a drop-off in foreign recruiting. However, many of our employee-owners rose to the challenge and stepped up to fill the gap with overtime hours. Recently, we've seen an uptick in both local and foreign recruitment, so things are looking up.

In addition to the issues outlined above, COVID-19 continues to present other challenges for us. Our region has struggled with lower-than-average vaccination rates. For some reason, vaccination hesitancy has become attached to religious and political beliefs for some people. This has led to families, churches, and companies being divided on the topic, and thus has created significant tension. While our vaccination rates at Friesens are significantly higher than the surrounding area, we do have a higher number of unvaccinated staff than we'd like. Unlike other organizations that have taken a hard stance on vaccination mandates, we're taking a

more pragmatic approach. Our belief is that the economic damage a vaccination mandate would cause to our business and our customers is greater than the health risks it would mitigate. Instead, we will continue to promote vaccination, and will likely maintain other prevention measures longer than we would have otherwise.

Taking all of this into account, our strategic planning for 2022 includes four major themes:

**People** – We'll focus on refining our approach to recruitment, retention, and advancement. All to inspire more people to join, stay, and thrive on our team. This will include an effort to remove barriers and increase incentives, to enhance our brand in the region, and to ramp up foreign recruitment.

**Systems** – We'll focus on building more automation into business (partially to help address the people challenge). Our long-term vision is to double the capacity of every team member by being exceptional at deploying industry 4.0 solutions.

**Products** – We'll focus on reviewing our product offerings. While we have the good fortune of an abundance of work, it is an ideal time to ensure that we are seeking and producing the type of work that best fits our capabilities. This is how we deliver more value to all our stakeholders.

**Reconnect** – We'll focus attention on reconnecting with all stakeholders. The pandemic disrupted how we connect with staff, with customers, with vendor partners, and with the community. It also pushed us into new and efficient ways of working together. While we won't "go back to normal," we'll be deliberate about creating a new normal by removing barriers, overcoming divisions, and seeking more human connections. This is an exciting opportunity to reimagine how we build and maintain relationships.

On behalf of all the employee-owners of Friesens, thank you for being a customer and a friend to us. We can only do what we do because of you!

## Sixteen Months and Counting—Book Division Update

By Byron Loepky, Senior VP of Books

The daylight hours are getting shorter, the temperature is dropping, and we are all checking our furnaces to ensure they are ready for the long winter ahead. It's Manitoba; it's what happens and it's what we do. It has also been sixteen months since we came out of the COVID effect in the second quarter of 2020. Friesens experienced a significant decline in sales as publishers figured out the impact of COVID-19 on the operational and sales sides of their business. Since then, it has been all hands on deck. We have tried to maximize our capacity as the book market has continued to be strong, and our customers have been putting in orders at an unprecedented pace.

The positive momentum in the book market has continued through 2021, and we have felt the demand inside our facilities. Our first three quarters saw a very strong sales increase of over 30 percent, partially because of the second quarter COVID effect last year, but mostly because of the robust book market and our great sales team.

| TOTAL SALES OF PRINT BOOKS (in thousands)            |              |              |           |          |
|--|--------------|--------------|-----------|----------|
|  | OCT.24, 2020 | OCT.23, 2021 | CHGE WEEK | CHGE YTD |
| <b>Total</b>   | 13,728       | 14,692       | 70%       | 10.5%    |
| UNIT SALES OF PRINT BOOKS BY CATEGORY (in thousands) |              |              |           |          |
|  | OCT.24, 2020 | OCT.23, 2021 | CHGE WEEK | CHGE YTD |
| Adult Nonfiction                                     | 5,573        | 5,518        | -1.0%     | 6.4%     |
| Adult Fiction  | 2,370        | 2,989        | 26.1%     | 26.4%    |
| Juvenile Nonfiction                                  | 1,296        | 1,327        | 2.4%      | -7.5%    |
| Juvenile Fiction                                     | 3,614        | 4,007        | 10.9%     | 10.8%    |
| Young Adult Fiction                                  | 382          | 493          | 29.6%     | 32.6%    |
| Young Adult Nonfiction                               | 61           | 66           | 9.5%      | 7.1%     |
| UNIT SALES OF PRINT BOOKS BY FORMAT (in thousands)   |              |              |           |          |
|  | OCT.24, 2020 | OCT.23, 2021 | CHGE WEEK | CHGE YTD |
| Hardcover  | 4,202        | 4,535        | 7.9%      | 12.2%    |
| Trade Paperback                                      | 7,435        | 7,950        | 6.9%      | 10.8%    |
| Mass Market Paperback                                | 660          | 580          | -12.1%    | -1.9%    |
| Board Books  | 911          | 1,053        | 15.6%     | 14.5%    |

mpd SOURCE: NPD BOOKSCAN AND PUBLISHERS REPORT NPD'S U.S. CONSUMER MARKET PANEL. COPIES APPROXIMATELY 80% OF THE PRINT BOOK MARKET ARE CONTRIBUTED TO USDB.

Production is running at full capacity; however, it seems no matter how much we add, it gets filled just as quickly. We have worked more than sixty thousand hours of overtime during the first nine months of the year, but almost all our equipment is still on extended schedules.

We know extended schedules are a challenge, and we are doing all we can to maximize the amount of work we can accept and get out on schedule. While our schedules have been longer than we (or you) would prefer, we are pleased that our on-time delivery rate remains in the mid-nineties and most of the dates that are missed are only missed by a few days.

One of the largest challenges we are facing is with the supply chain. I won't go into detail here, as it will be covered elsewhere in the Publishers' Newsletter.

Production numbers are up in almost every area:

- Sheetfed impressions up 22 percent
- Web impressions up 59 percent
- MGI sheets UV'd are up 107 percent
- Perfect Binder units are up 45 percent
- Encased books are up 70 percent

The impact of the pandemic on our team at Friesens has been significant this past year. New cleaning protocols, mask usage, fogging, sanitizing stations, physical barriers, vaccinations,

and other strategies have helped to keep our staff safe, but has required adjustments to be made in all departments. While the COVID numbers in our community and province have ebbed and flowed, we have adapted. However, we have had to deal with many staff missing shifts and other staff covering for them. Our managers and their teams have done an amazing job of minimizing the impact of these absences with the cooperation of many staff.

The leadership team at our Book Division participated in strategy planning sessions in October as we update our path for 2022 and beyond. It's always a good time to ensure alignment between the leadership in our departments and make sure that all of us are rowing in the same direction.

We could not accomplish what we do without our wonderful staff, and we are very grateful for the fantastic team at Friesens. They have stepped up time and time again.

### Progress on Capital Plans

As I have mentioned in previous newsletters, 2021 was a lighter year for capital, but investigations and negotiations are well on their way for 2022 capital plans.

There has been a significant effort made by the CI teams and the operations managers to improve the organization of our buildings and to complete some of the equipment moves between buildings. Much has happened since our last newsletter:

- The Cordoba (specialized scoring machine for covers) has been moved to our new finishing facility
- The old Kolbus Perfect Binder at our printing facility has been sold and removed
- The new Muller Perfect Binder was installed at our finishing facility
- Both MGI machines (used to apply UV to covers and jackets) have been moved
- Our KBA single-colour press has been sold and removed
- The Valmet sheeter has been sold and will be removed in November (replaced by a new sheeter)
- The Ventura digital sewing system will be moved beside our two HP 50000 presses in November
- A second HP 50000 has been installed and training will begin on October 25

Our capital budget for 2022 (while not yet approved by the board) is expected to be larger again. The Book Division budget is focused on additional print capacity using inkjet technology, additional digital finishing capacity, and additional Perfect Binding capacity. We expect to make some important announcements in the coming months.

While there are some additional smaller items, I hope the message you receive from us is our commitment to continuing to invest in our business. We believe the book business and Friesens will continue to be around for a long time, and one

way to keep ourselves viable is to continue to invest in new technology and equipment.

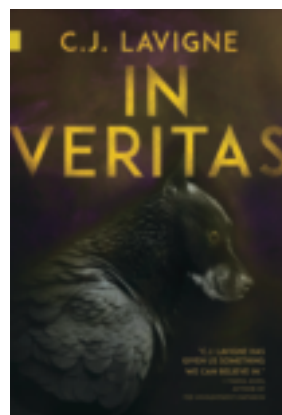
On behalf of all the employee-owners at Friesens and specifically the ones from the Book Division, I pass along my sincere appreciation for your partnerships and for entrusting us with your work. We would not be in business without you. We look forward to a strong finish in 2021 and a quick start to 2022.

### 2021 Alberta Book Publishing Awards

By Donovan Bergman, Accounts Manager—Prairie Provinces, Yukon, Western ON

On Friday, September 17, eager viewers logged on to the Book Publishers Association of Alberta’s (BPAA) YouTube channel to watch the presentation of the 2021 Alberta Book Publishing Awards. These awards were presented virtually in thirteen categories, with a fantastic video production featuring host Judy Piercey, BPAA President Alexander Finbow, and comments from the winning publishers.

Friesens is thrilled to have played a part in producing the following award winners:

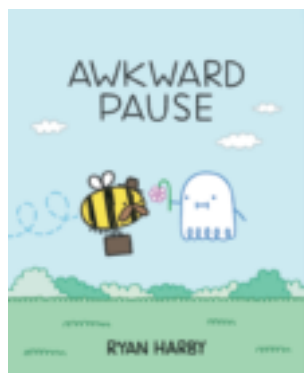


#### Speculative Fiction Book of the Year

*In Veritas* by C. J. Lavigne, published by NeWest Press

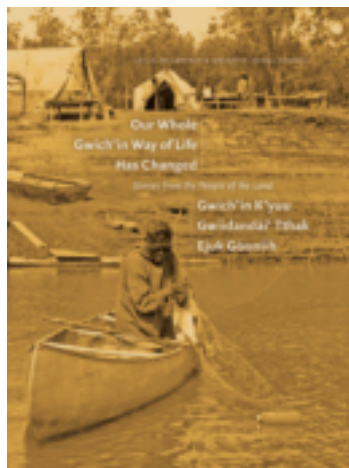
#### Graphic Novel of the Year

*Awkward Pause* by Ryan Harby, published by Renegade Arts Entertainment



#### Children’s & Young Adult Book of the Year

*Howdy, I’m John Ware* written by Ayesha Clough and illustrated by Hugh Rookwood, published by Red Barn Books



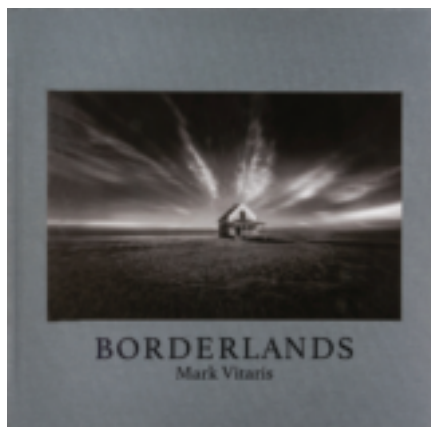
#### Scholarly & Academic Book of the Year

*Our Whole Gwich'in Way of Life Has Changed / Gwich'in K'yuu Gwiidandäi' Tihak Ejuk Goonih: Stories from the People of the Land* by Leslie McCartney and Gwich'in Tribal Council, published by University of Alberta Press



#### Trade Fiction Book of the Year

*Watershed* by Doreen Vanderstoop, published by Freehand Books



#### Regional Book of the Year

*Borderlands* by Mark Vitaris, published by Frontenac House

#### Book Illustration

*A Brush with Depth* written and illustrated by Rick Sealock, published by Frontenac House





**Lois Hole Award for Editorial Excellence**

*One Madder Woman* by Dede Crane, edited by Deborah Willis, published by Freehand Books

Congratulations to all nominees—here's hoping we can meet in person in 2022

### BC and Yukon Book Prizes

By Jorge Rocha and Gerhard Aichelberger

On September 25, the winners of the 2021 BC and Yukon Book Prizes were announced during the virtual gala and viewing party.

The event was hosted by author Monique Gray Smith. The finalists included titles from Arsenal Pulp Press, Douglas & McIntyre, Harbour Publishing, Nightwood Editions, Orca Book Publishers, Rocky Mountain Books, Talonbooks, Tradewind Books, TouchWood Editions, Friends of the ABPBC, and Figure 1 Publishing.

The winners of the 2021 BC and Yukon Book Prizes:



**Sheila A. Egoff Children's Literature Prize**

*Genius Jolene* by Sara Cassidy, illustrated by Charlene Chua, published by Orca Book Publishers

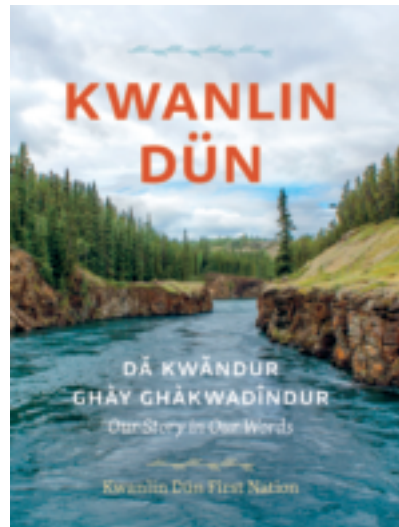
### Christie Harris Illustrated Children's Literature Prize

*Grandmother School* by Rina Singh, illustrated by Ellen Rooney, published by Orca Book Publishers



**Bill Duthie Booksellers' Choice Award**

*The E. J. Hughes Book of Boats* by Robert Amos, published by TouchWood Editions



**Roderick Haig-Brown Regional Prize**

*Kwanlin Dün* by Kwanlin Dün First Nation, published by Figure 1 Publishing

The winners of the 2021–2022 PMC Indigenous Literature Award, presented by First Nation Communities READ:

### Children's

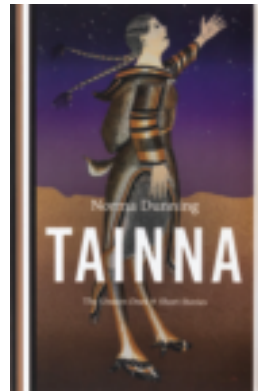
*It's a Mitig!* by Bridget George, published by Douglas & McIntyre

### YA/Adult

*Orange Shirt Day September 30* by Phyllis Webstad and Joan Sorley, published by Medicine Wheel Education

Friesens had the pleasure of printing a few of these titles:

Two BC Publishers' titles are finalists for the 2021 Governor General's Literary Awards:



### Fiction

*Tainna: The Unseen Ones, Short Stories* by Norma Dunning, published by Douglas & McIntyre

### Poetry

*A History of the Theories of Rain* by Stephen Collis, published by Talonbooks

Congratulations to all nominees—here's hoping we can meet in person in 2022!

## MyBooks Help Videos

By Brad Schmidt, Technical Support Specialist

MyBooks is the online tool for Book Division that provides an interface for our customers to access information regarding their book projects. This tool provides information such as quotes, invoices, and job status. Along with this there are tools that allow for uploading files, downloading templates, and viewing proofs. These are all accessible using a web browser. Within the original MyBooks tools, there was an extensive help document that described in fine detail the various tools and functions of the website. This help document was almost a book unto itself.

In 2016, MyBooks was redesigned and prepared for its official launch in February of 2017. The goal of the project was to update the tools to use current internet technologies and streamline the tools making them much easier to use. We found that customers were reluctant to read a full MyBooks help manual just to use an online tool. With a focus on simple design, the hope was that MyBooks would be so intuitive and easy to use that a help document would be unnecessary.

This year, the Marketing Department set up the goal of creating customer video training. As part of this process, it was identified that the MyBooks website would benefit from video training. These videos were to promote the adoption of MyBooks and improve the customer's experience when using an unfamiliar tool in MyBooks.

Recording the videos for the MyBooks training topics required a bit of knowledge and experience. Having never made help videos before, I reached out to one of our Customer Project Specialists in the Yearbook Division. It had come to my attention that he had experience creating training videos for our Yearbook customers. He shared his experience on how to prepare the videos and included some great tips on how to do the voice portion of the video. It was important to keep the videos under five minutes to keep the viewer engaged.

To begin, I prepared an outline for the various MyBooks topics I intended to cover. Putting together my first few videos was a learning experience. For example, I discovered that disabling my phone and text message notifications was critical. Having the phone notification interrupt my recording session taught me this lesson the hard way. I had to really concentrate and not to lose focus when a recording was going well. One slipup or word bungle and I had to redo the recording process. It was encouraging each time I completed a successful run-through of a training video.

After several sessions, I was able to prepare ten videos covering various topics on how to use the tools in MyBooks. I handed these basic videos off to the Marketing Department and they arranged to have the final touches added, such as a proper splash screen highlighting the specific topic. It was great to

see the finished product and how it would be integrated into the MyBooks help experience.

## CONTINUOUS IMPROVEMENT AT FRIESENS

**The six most expensive words in business are: "We've always done it this way."**

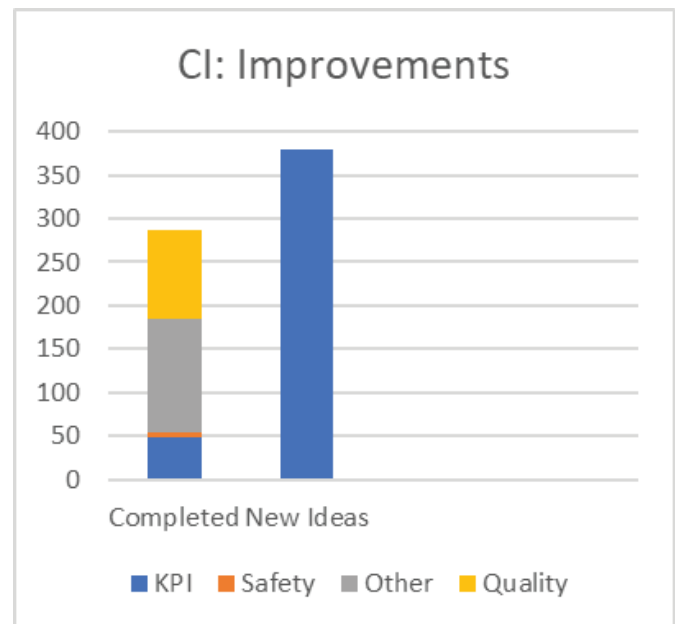
As a company, Friesens strives to achieve excellence as we help customers share their best stories. The Continuous Improvement (CI) culture that Friesens promotes helps us continually look at ways to increase quality by taking the time to eliminate waste, streamline processes, create organized workspaces, and take care of the well-being of our employees. When we achieve improved quality, our customers experience success.

CI is often made up of incremental improvements over time, but can also look like a breakthrough improvement that happens all at once.

### CI: COMPLETED NEW IDEAS

To ensure all our employee-owners have the opportunity to share ideas for improvement, we have implemented the use of Huddle Boards in many of our departments. Huddle Boards help us track how many ideas are being generated and completed each month.

Since the beginning of the year, we have documented a total of 379 new ideas for improvement, of which we have completed 286.



We estimate that through these ideas alone we have saved more than 910 work hours (which amounts to 75 hours saved per month). We also have:

- Less waste
- Better quality control
- Better customer service
- Less frustration and confusion



Earlier this year, we partnered with Blue Sky Opportunities. Blue Sky Opportunities is a local nonprofit organization that helps maximize the independence of adults with intellectual disabilities. They supply Friesens with all our skids. As a result of our partnership, they were able to purchase specialized wood-notching equipment, which gives them the ability to notch two-by-fours, which are required for four-way skids. We no longer need to purchase four-way skids from an alternate source. Through this initiative, we have been able to ensure we have good supply and stable pricing, which results in fewer price increases for our customers.

Our Specialty Department, which is located at our Industrial Park location, is where delicate and precise handwork is done. Using the spaghetti diagram method, we reconfigured the space and added additional lighting, which has allowed us to reduce unnecessary motion and handling of product, organize and remove unnecessary clutter, and improve accuracy. These changes have resulted in fewer errors, produced a higher quality of product for our customers, and created a safer work environment for our employee-owners.



BEFORE



AFTER

#### CI: "GREEN" INITIATIVE

We have automated our process to allow us to reuse cartons left over from jobs instead of recycling them. Using existing cartons allows us to substantially reduce waste, remove unnecessary inventory, increase our capacity on our carton maker, and ultimately makes us more productive so we can get your books out the door quickly and efficiently.

#### CI: IDEAS IN PROCESS



BEFORE





### AFTER

We are in the process of organizing our inventory to create a better system to help reduce unnecessary inventory and wait times. It also makes for a cleaner, more organized workplace, resulting in improved productivity. As we grow, our goal is to use these techniques to increase capacity and efficiency.



We removed thirty unnecessary skids from this racking.



We are also looking into ways to expand our robotic initiative. After having successfully installed cobots at the end of our book lines, we are now investigating how we can utilize robots for our Perfect Binder feeders. The robots would feed the heavy bundles of signatures into the stream feeders. By installing robots, we can eliminate the repetitive heavy lifting for our employee-owners and increase production speed and accuracy.

**QUALITY IS FREE**; it's not a gift. The "non-quality" things are what cost money.

**QUALITY IS REMEMBERED** long after the price is forgotten.

**QUALITY** is what is important, not quantity.

**QUALITY IS FIRST!** Every day, every hour, every second. It's giving your best every time all the time.

### Paper Supply Chain Update

By Andrew Fennell, VP of Finance & Administration

#### Supply Challenges

In July, I wished the following: *If only the supply side could keep up!*

And now in October, I repeat: *If only the supply side could keep up!*

It is a daily challenge right now to keep up both to the troubled supply of paper (and board ... and cover material ... and ... and ...) and manage our way through unprecedented price increases.

It remains true that the supply of paper is limited. The last few years of mill and machine closures have created a serious imbalance between supply and demand, inventory depletion, paper delays and shortages, and price increases.

As LSC Communications recently reported:

*So much capacity has come out of the North American market that a lack of availability is part of the reason demand has not recovered further; paper buyers are having difficulty acquiring needed paper from oversold mills [as well as] rebuilding inventories depleted in 2020.*

Availability of paper is indeed problematic right now. As reported in July, we are “on allocation” with all paper mills. What that means is that the mills have implemented limits with regards to what they can or are willing to sell to buyers. For example, they may limit Friesens to eighty thousand pounds of paper for a month, and requests or submitted orders for more than that will simply be rejected.

We will endeavour to find good solutions when paper is unavailable, and that includes providing alternatives when possible.

### Paper Pricing

The trend of price increases continues, with every mill implementing paper pricing increases on all grades—with multiple increases, actually. As Quad Graphics recently reported:

- As of October 1, coated paper prices will have increased by between 15% and 20% for the year, depending on the grade.
- As of October 1, UFS [uncoated freesheet] paper prices will have increased by about 20% for the year.
- As of October 1, UGW [uncoated groundwood] paper prices will have increased by 17% for the year.

With paper mills essentially being “sold out,” they have been relentlessly increasing prices ... partly due to rising costs, but also opportunistically. Supply has been outstripped by demand, and mills are unable to increase output in any substantive way, resulting in multiple price increases. I do expect the price increases to level off, but not until late Q1 2022.

### Paper Lead Times

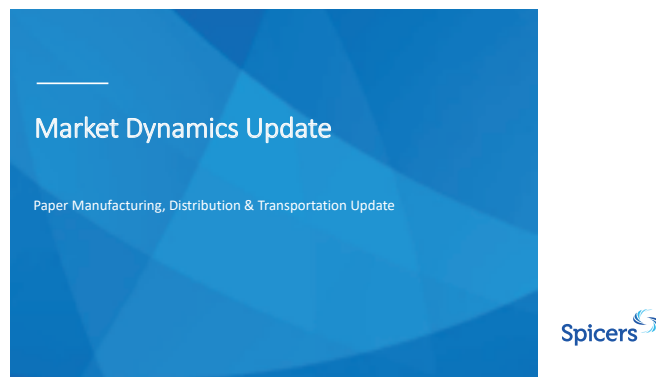
Longer lead times for all paper that we purchase continues to be the norm. Historically, normal lead times have been four to six weeks, or even three weeks when demand has been light. Lead times have worsened in the last two months, such that getting paper now typically requires a lead time of **nine to twelve weeks**.

Friesens continues to stock “house items” and replenish our inventories, which resolves (to some extent) the problem of long lead times, but longer lead times also force us to forecast and predict demand several months in advance.

It is, as some have suggested, a “perfect storm” on the supply side when it comes to paper and other raw materials. We will now do our best to weather that storm!

## Paper Manufacturing, Distribution & Transportation - update from Spicers

The following information and data has been supplied by Spicers a key supplier of paper products for Friesens.



### Shifting Industry Dynamics – Supply Constraints

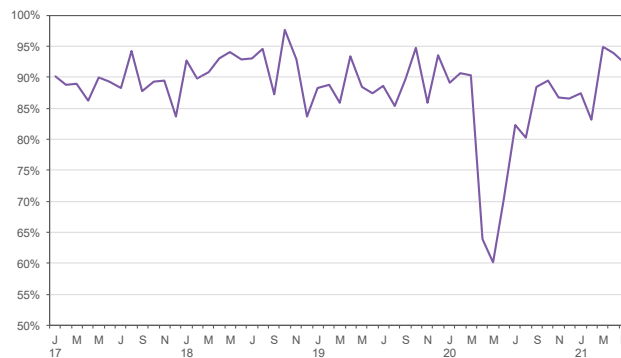
- Supply is constrained with many paper manufacturers having closed mills, idled machines or converted over to packaging papers following the pandemic-driven collapse of demand.
- Now, so much capacity has come out that Mill Operating Rates have ascended dramatically with post-pandemic improvements in the North American economy and higher demand for print.
- Mill inventories on Coated and Uncoated Papers are at the lowest levels since 2018.
- Normally, offshore imports would be expected to quickly fill the gap between domestic supply and demand, but with the disruptions to global shipping markets, international transport is difficult and expensive.
- Offshore lead times have extended by several months for most shipments.
- So much capacity has left the market since the first half of 2020 that availability is an issue for many grades.

### Uncoated Operating Rates in North America

Mill Operating Rates have ascended dramatically since 2020

Figure 6

Uncoated freesheet operating rates in North America  
Seasonally adjusted



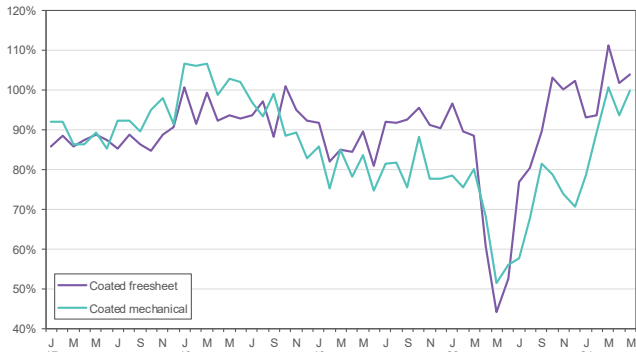
Data source: Fastmarkets RISI estimates.

## Coated Paper Operating Rates in North America

Operating Rates have risen rapidly since the beginning of the pandemic and are extremely high

Coated paper operating rates in North America

Seasonally adjusted



Data source: Fastmarkets RISI estimates.

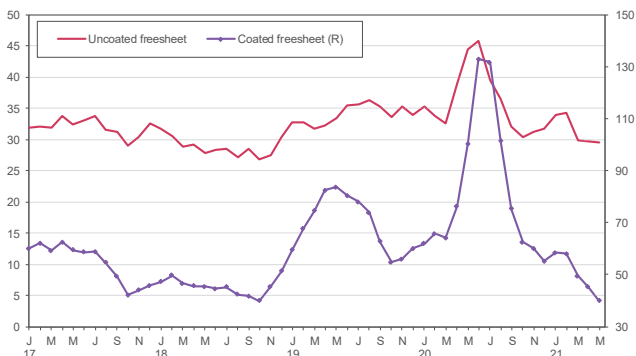
## North American Producer Inventories

Mill inventories are at their lowest level since the tight market of 2018

Figure 1

North American producer inventories of printing & writing papers

Days of supply



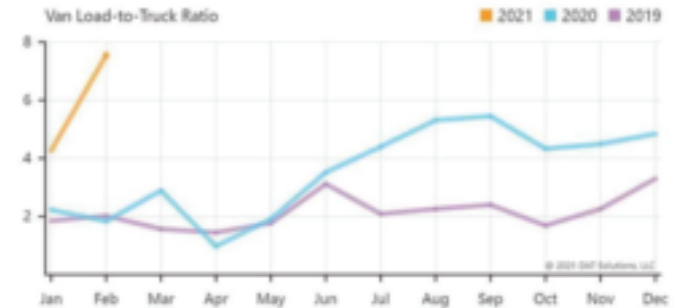
Data source: Calculated by Fastmarkets RISI from FPPC data.

## Shifting Industry Dynamics – Pricing Dynamics

- Most of the increases that were projected for later in 2021 or even 2022 are occurring more quickly as demand increases. Key drivers are:
  - Raw materials costs continue to climb
    - Texas storms, Suez Canal blockage have impacted supply
    - Industrial Chemicals have risen in the last 4 consecutive quarters (14.7% in Q1 & 11.9% in Q2 2021)
    - Pulp rose 14.4% in Q1 and 22.8% in Q2 2021
  - Trucking costs continue to rise, with increases of 6.7% to 14.7% in each of the last 4 quarters
  - Global container availability has caused a dramatic rise in costs and shipping delays
    - increases range from 400% to 600%

## Ratio of Loads to Trucks – Domestic Trucking is Challenged

Trucking demand is high with approximately 5 truckloads of product to ship for every 1 available truck. While typically we would see a softening of rates prior to produce season, that hasn't occurred, and as we enter both produce and hurricane seasons, it's suggested high transportations costs will continue throughout 2021



## Global Ocean Freight Trends

- Globally ocean freight rates are continuing to climb fueled by demand and equipment shortages in Asia.
- Capacity and equipment continuing to be scarce.
- Introduction of “Premium Surcharges” that shippers pay in order to get guarantee space, equipment, etc.
- Container costs have increased by 400 to 600% causing dramatic escalation in product pricing.
- Lead times are months longer than normal.

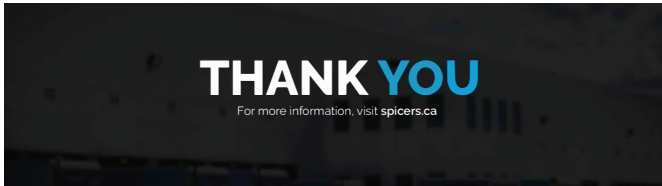


## Canada Inflation Summary – Highest level since 2011



## Conclusions

- Supply will continue to be constrained as the economy improves post-pandemic
  - Mill manufacturing capacity is lower, mill inventories are lower and operating rates are high, so making more paper isn't an option
  - As well, trucking and ocean freight are more expensive and less available, and demand is strengthening
- We expect that pricing pressures will continue to build over 2021 and into 2022
  - Price increases are expected to continue as the market constraints continue
  - This will impact paper, plastics, polyethylene, polypropylene and many other goods
- We strongly encourage planning ahead and forecasting your needs
- Our commitment is to communicate with you and to build upon programs together to mitigate challenges as much as possible.



## Connecting with Our Customers in Denver

By Tim Hewitt, Accounts Manager—Mountain States

March was something of a rough time, personally. I had just attended the virtual funeral service for my father, who lost his fight with cancer in February, and the world was still feeling very isolated.

As I lay in bed one night, I noticed on Facebook that a band Brooke and I had followed for years, National Park Radio, mentioned that they would be in Colorado in three months' time and were looking for possible venues for small concerts. Feeling falsely emboldened, and knowing that live music is always good for the soul, I messaged the band privately and offered our house as a venue, assuming this was beyond a long shot. I shared a private story of how music has impacted our family's lives. Not expecting a response, I was shocked when Stefan, the band's founder, responded an hour later with an emphatic, "Yes, we will play a concert at your house."

After some discussion, we agreed that June 25 would be an ideal date as it was a Friday, and our location put them just three hours away from their next show in Casper, WY, the following afternoon. The date was set, now the rest of the planning needed to begin. As always, I underestimated how much work arranging an event would be!

Between the time we had agreed upon dates, COVID-19 vaccinations had seen a great uptake, and the number of new cases were falling by the day. The world finally felt like

it was opening up again. So, we reached out to customers and friends and decided this would be our Post Pandemic Party, a celebration of a return to socializing and a return to a world that had been on hold for fifteen months. In the days preceding the concert, Denver had many days where the temperature was in the upper nineties, and a few broke the three-digit mark, so we were concerned that the heat might play a factor. As the ten-day forecast came into focus, we noticed that the only day with rain would be Friday. As the day got closer the forecast looked worse, with thunderstorms forecast for the entire day, but we went ahead with our plan with the contingency that they would have to play the concert in the garage and we would borrow as many pop-up tents as we could in case things got ugly! On Thursday, we left to pick up supplies, but quickly turned around as pea-sized hail started to get worse and the streets saw some flash flooding.

Friday morning came, and all that we couldn't accomplish on Thursday had now been added to Friday's to-do list. Luckily, we live in a cul-de-sac with some amazing neighbours who not only helped to set up, but allowed me to drill anchors into their homes to string lights back and forth across the street.



The band arrived as I was finalizing the light installation, and helped with the last couple of details. The whole time the weather was perfect—sunny and around eighty degrees. All drinks were put on ice, the churro truck owner confirmed he would arrive on time come rain or shine, and our caterer arrived and set up. All was on schedule and looking good. Then the rain came, and the hail, and the wind, and some



guest cancellations, but as they say, “The show must go on!” and it did. The band set up their gear under a canopy, and we decided that keeping that on hand for the next round of rain would be prudent, and within twenty minutes of the show’s start it was needed. Weather wrinkles aside, it ended up being a perfect evening. National Park Radio were as amazing as we had hoped, and the joy of being able to gather was evident. The world is a large and wonderful place, but often the very best part of the world is not the places, but the people: our friends, family, and customers.

## Positive Impact with GMG Proofing Software

By Steve Voth, Print Facility Operations Manager

We are pleased to announce the installation of a new GMG proofing software. It is a front-end rendering system which provides improved controls and accuracy of our contract proofs. Contract colour proofing has been around for what feels like forever. Maybe you remember the Colour Art contract proofs we made back in the nineties. That dates me, but it is a good start on how contract proofing has evolved.

For the last twenty years, we have been using inkjet printers to make contract proofs. The technology has improved, going from standard 4-colour to 8- and 11-colour printers, which has improved the ability to replicate both process image colour match to offset and PMS (Pantone Matching System) colour matching. Today’s inkjet printers offer onboard spectro scanners to read and verify each proof as it is printed, ensuring all the proofs are within the GRACoL specification.

There are two significant improvements that customers will experience with the new GMG system. First, this software provides greater control over our proofing system which means more accurate proofs. Customers will mainly see an improvement in our ability to proof black and white or colour printing for books printed on uncoated paper. We have had this ability in the past, but this change improves that entire process.

The second improvement is the paper we use for the contract proofs when printing on uncoated paper. The paper is called GMG matte and it better simulates uncoated paper. It improves the dot gain simulation and better mimics what uncoated paper would look like. While simulating uncoated proofs is still a challenge this new system will certainly help better set expectations.

With these improvements, we should see even better matches to the proofs on press.

## New Foil & Embossing Samples Book

We are excited to announce that we have a new Foil and Cover Embossing Samples marketing piece. This booklet is designed to be a sampler of how enhanced cover and jacket techniques respond on different substrates. It is a practical

piece designed to show what works great as well as potential drawbacks when foil stamping.

We are proud to offer the finest stamping and embossing available anywhere. Order your copy today and see for yourself.

The following samples are also readily available:

- Colour Printing Paper Samples book
- Black Printing Paper Samples book
- Cover Lamination Samples book.

We are here to help! Please talk to your Sales Representative and order the sample book that meets your needs.



## Places We Sell—South/East Coast US Territory

By Brandie Herrell

A little over a year ago, I was blessed to become the newest addition to the Friesens sales team. It is truly one of the greatest opportunities that has ever been extended to me. I was excited to join the ranks of such a storied and esteemed book manufacturer, but a huge piece of that honour was the chance to represent the clients in the South/East Coast territory. Although I have travelled to and lived in many areas in the United States, the South is my favourite place to be and it’s where I call home.

My region consists of Arkansas, Kentucky, Tennessee, Georgia, North Carolina, and South Carolina. There is such a variety of geographical beauty and cultural diversity in these six states that they can seem like worlds unto themselves. As I travel through my territory, I can go high on the mountaintops of the Ozarks, Great Smoky Mountains, or Appalachian Trail. I can explore, from the rolling hills of the Kentucky Bluegrass region to the epicenter of the Mississippi Delta in Memphis and through peaceful farmland in Georgia. I’m able to wash away the pressures of publishing and printing in Arkansas’ Hot Springs, the beaches of the Outer Banks, or the shores of South Carolina’s Low Country. In a day’s time, I can drive from an international hub of business and culture in Atlanta, GA, to the mecca of country music and Christian publishing in Nashville, TN. Let me give you a brief tour of the Southeast US and the publishers that I’m proud to call friends and clients.



**Arkansas:** The Natural State ranges from the Ozark plateaus to its therapeutic Hot Springs and east to the Mississippi River. Before taking my position at Friesens, I mostly only knew that Arkansas was home to the retail giant, Walmart. I now know that they were progressive enough to elect the first woman, Hattie Carraway, to the US Senate. In the past year, I have had the pleasure of partnering with University of Arkansas Press and making some Razorback friends. I educated myself about the Crystal Bridges Museum of American Art, as Friesens has been blessed to create many beautiful books in homage to their world-class exhibits. This marvel of architecture is nestled in 120 acres of Ozark Forest, with five miles of walking trails. They boast a renowned art collection ranging from Rockwell to Warhol. I have begun a relationship with Dayspring Cards in printing their Christian journals, and worked closely with up-and-coming book distributor Givington's LLC. This state has truly been a hidden gem in my territory.



**Georgia:** The Peach State offers everything from the corporations and culture that make up the metropolis that is Atlanta to the refined, Southern architecture and history of Savannah. The terrain ranges from the Appalachian Mountains to farmland to coastal shorelines. It is the birthplace of Dr. Martin Luther King, Jr., and is still the home of his pulpit at Ebenezer Baptist Church. In a day, you can drive from the massive movie studios in Atlanta to the easternmost point of Georgia on Tybee Island (another place in the South I was once blessed to call home). Friesens has enabled me to meet many great people in this state, so now I have more reasons to visit than just peaches and pecans. The Georgia Museum of Art allows us to manufacture the volumes that coincide with their memorable exhibits. University of

Georgia Press has recently entrusted me with printing their first two titles at Friesens, and we have two more great books planned for 2022. Fifth Wonder gave me the gift of printing a self-published children's book and distributing it to every foster child in GA. Mercer University Press has let Friesens bring the stories they publish to life for many years. I hold each of these opportunities so dear.



**Kentucky:** The Bluegrass State means so many things to me. I was born and raised there, and it is still home to my family. Plus, the University of Kentucky is my alma mater (Go Wildcats!). I've always been fond of saying that Kentucky got good at three things and we ran with them: bourbon, fried chicken, and horse racing. Most of the state is comprised of gently rolling hills covered in signature Bluegrass, with the Appalachian Mountains and coal mines in the east. There is so much untouched, natural beauty there, with at least a third of the state being undeveloped forests. We have given the world the spirits of the Bourbon Trail, KFC, the Louisville Slugger, and the Kentucky Derby (you're welcome!). I've always known that greats such as Abraham Lincoln and Muhammad Ali hailed from my home state, but this past year I got to learn about the many great publishers there as well. Sarabande Books has been a long-time Friesens client and is a nonprofit that focuses primarily on publishing poetry and short fiction. We've had the honour of printing titles for the University Press of Kentucky. One I did not expect was Fons Vitae in Louisville. They are also a nonprofit and academic press, publishing scholarly works on world spirituality. Most notably, the teachings of al-Ghazali, a prominent Islamic philosopher. Kentucky is always full of surprises!



**North Carolina:** The Tar Heel State is another diverse geographic region in the South. The Appalachian and Blue Ridge Mountains lie to the west. There is abundant tobacco farmland in the centre that stretches east to the serene beaches and lighthouses of the Outer Banks. North Carolina is one of the original thirteen states, the top producer of tobacco in the US, and the birthplace of aviation. Here you can traverse the Blue Ridge Parkway, absorb the panoramic views of Clingmans Dome, explore the eight-thousand-acre compound that is the Biltmore Estate, or debate the mysterious history of Roanoke Island. This East Coast state has also had a long-time love affair with educational excellence. The University of North Carolina Press is the oldest university press in the South, and a staple partner of Friesens Corporation. We also take pride in crafting ideas into print for Wake Forest and Duke University Presses. This summer, I was able to manufacture and distribute a Truist legacy book to sixty thousand BB&T employees through Pace Communications. I've had the privilege of creating titles with New Growth Press that align with my own personal faith of Christianity. Plus, I've forged real literary alliances with the incredible book creators at both Goosepen and Horse & Buggy Presses.



**South Carolina:** The Palmetto State is another place in my territory that I once called home, living in the suburbs of Charleston. I have fond childhood memories of vacationing in Myrtle Beach every summer. There is natural beauty and simplicity stretching from the western Blue Ridge Mountains to the eastern, coastal shorelines and down to the swampy Low Country. The vibe drips with southern belle and centuries-old aristocratic culture. My favourite region lies from Charleston to the wealthy golf areas of Hilton Head. Battery Park in that city is a backwater sight to behold and home to the first cannon fired in the Civil War, all resting in the shadows of the historic homes of Rainbow Row. It's been amazing to come aboard and work hand in hand with the likes of University of South Carolina Press. I've been able to strengthen Friesens' relationship with Arcadia Publishing and their subsidiary, History Press, who publish detailed depictions of US history and folklore on a local and regional scale. More Low Country friendships have formed while printing the hunting enthusiast titles and limited editions from Sporting Classics. Plus, I can never forget my partnership with Class LLC, who is often after my own heart with their beachy books designed on the gorgeous Pawleys Island. I can't wait to get back down there for a visit!



**Tennessee:** The Volunteer State is my home today, and it is a wonderful place to live. To the west, you have Memphis, the capital of the Mississippi Delta. When I hear Memphis, I think Beale Street, the home of the blues and the birthplace of rock and roll. To the east, you'll find the Great Smoky Mountains, rich moonshine traditions, and ten thousand caves and caverns. In the middle, you'll find me and Nashville, TN. To most, Nashville means country music, bachelorette parties, and hot chicken. That it is, but it's so much more! This city is alive with people chasing their dreams, and musicians who feel a debt of gratitude to this city for helping their dreams come true. We're the fastest growing city in the US, and full of celebrities who are accessible and give back to the community. In my time with Friesens, I have learned that Nashville is also home to a wealth of Christian publishers. We have been lucky enough to have long-lasting relationships with Hachette Book Group and Harper Collins Christian. Over the past year, I've been humbled to begin partnerships with Dexterity Books, Chalice Press, and Southwestern Publishing. I'm also excited to have my first title in production for the University of Tennessee Press, and I've created some gorgeous books for Vanderbilt University Press, too. It's so rewarding to be an extension of these powerhouse publishing teams and create such friendships here in my home state.

A few days ago, I was tasked with adding this article to Friesens' Publishers' Newsletter. As I write this closing, I am half a day past the deadline. It wasn't as short and sweet as I set out for it to be. This is a love letter to my region, my territory, the South, the East Coast, the beaches, the mountains, the farms, the publishers, the universities, the people, my clients, and all my new friends. As a Cadillac Three song once said, the South is "Where the world don't seem so damn modern. Where good ole boys [and girls], like me, still have a chance. This is where I was born, and this is where I'll die." I wouldn't want to work for any other team, as Friesens has more Southern values in kindness, integrity, and faith than they realize. I certainly wouldn't want to work with any other set of clients and publishers. I hope y'all enjoyed my romanticized musings and I pray you conclude your day with a tall glass of sweet tea, and no one uses the words "bless your heart" to hurt your feelings. Tell your mama and 'em I said hi!

## SCALING IMAGES

by Brad Schmidt

There are often different approaches that can be taken when preparing a book. When using InDesign or Photoshop there are often multiple ways to achieve the end result. In speaking with different users of Photoshop, you will find that there are many different approaches for how to solve a specific problem. Each user brings their own preferences into the process. For some, when making colour adjustments the natural tools are Curves or Levels. For others it may be Brightness/Contrast or Hue/Saturation. The end results may be similar, but the path to get there can be quite different.

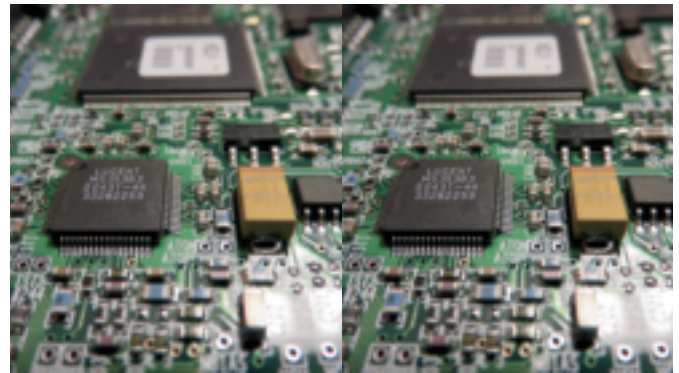
Even something as simple as which file type to choose when saving a file can be a topic of heated discussion. When I started working in prepress, there was a strong focus on only supplying images in TIFF or EPS format. Over the years, this requirement has softened and I often see images provided in other formats. With the adoption of InDesign we saw this shift to the use of more image formats. Photoshop files in PSD format started to become more common. The ability to maintain the adjustment layers in the original images became a compelling reason to consider keeping images in PSD format. The drawback of taking too much disk space is less of a deterrent as storage space has become less expensive.

Even the endless debates about the merits of supplying images in JPEG format have largely subsided. In the past it was rare to see images supplied in JPEG format. I can even remember that JPEGs were often converted to TIFF in many workflows. Today we see images provided in a variety of formats, including TIFF, JPEG, PSD, EPS, or even PDF.

When deciding on the steps to prepare a project for print there are often various factors that need to be evaluated. There is usually a balance between speed, flexibility, and quality. Decisions made early in a project will likely favour one of these qualities at the expense of another. I often see this in the debate about which is better, working in RGB

or CMYK. These values come into play in this process, as one workflow offers more flexibility and the other offers more control. Each has its place, but the goals of each project need to be considered when navigating which image format, colour space and software will be used to construct a project.

Another process that comes up for discussion is the sizing of images. When images are placed onto the page, InDesign offers a variety of tools to manipulate the image within the page layout. It is very common to crop images in InDesign to only use a portion of the photo. Images can also be rotated or flipped. InDesign also provides an option to scale the image within the page layout. The other option is to open the image in Photoshop and adjust the size there. This is one of those areas where it is much more convenient to adjust the size in InDesign while working on the page layout. Flexibility would definitely be an advantage to adjusting image size in InDesign, but is there a quality difference? Both Photoshop and InDesign are Adobe products, so one might expect the sizing methods to be the same.



InDesign scaled vs. Photoshop scaled

To test this, I took an image and placed it in InDesign and reduced the size significantly, resulting in an image about 10% of the original size. The effective resolution for this image increased way beyond the recommended 300 ppi we use for printing. I took the same image and reduced the size in Photoshop to 10% and made sure that the final resolution was 300 ppi. This allowed me to place the images side by side. I then exported the page to PDF using our recommended PDF



settings, which downsamples images to 300 ppi for images that are above 400 ppi. The image that was sized in Photoshop converted to PDF without any change, while the image that was scaled in InDesign was downsampled to 300 ppi using the engine built into InDesign.



InDesign scaled close-up

When comparing the two methods, there is a difference. It is not a huge difference, but there is a difference. Using Photoshop, the results are an image that maintains more detail than the image that was scaled using InDesign. By zooming in for a closer look we can see that the InDesign image

has a slightly softer appearance. Depending on the project, this could be reason enough to take the images back into Photoshop.

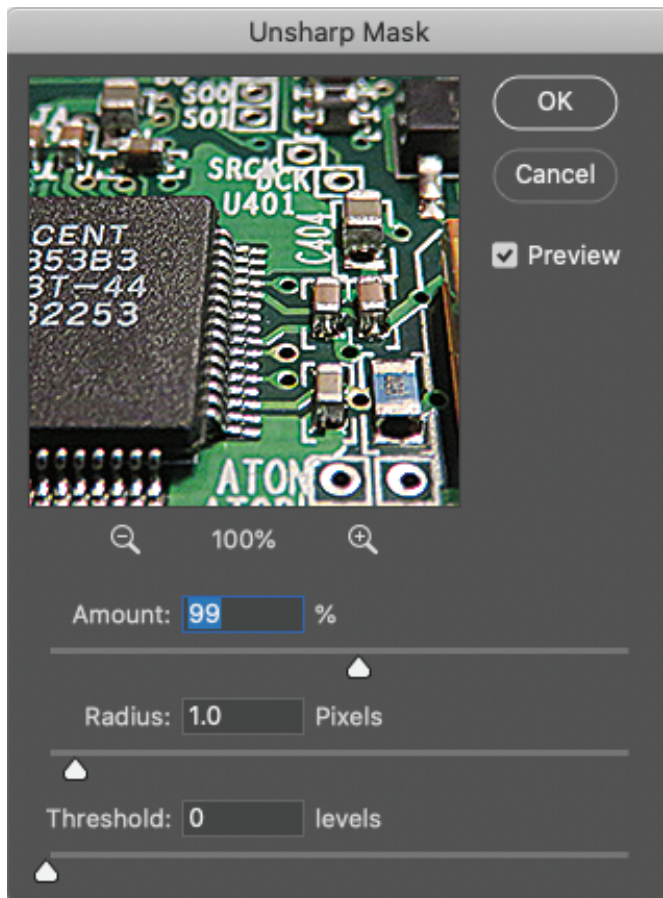


Photoshop scaled close-up

Since we are already in Photoshop to perform the sizing adjustment, we can also apply an Unsharp Mask to further enhance the detail in the image. By resizing in Photoshop and applying the Unsharp Mask, the detail is further enhanced. The clarity of the text on the circuit board and the texture of the chip surface are clearer. Excessive application of the Unsharp Mask can result in halos along the edges.



Photoshop scaled close up with Unsharp Mask

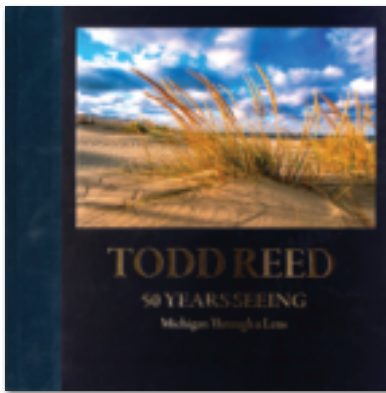


Photoshop Unsharp Mask settings

In the end it really comes down to the requirements for each individual project. Are the quality requirements for the project such that the extra steps to edit in Photoshop will be worth it? In many cases there may be a balance, where small percentage adjustments can be done safely in InDesign with little sacrifice to quality. For larger scaling adjustments, the extra steps maybe worth the effort. As a guide, we usually recommend a scaling of more than 20% up or down to be considered for a Photoshop adjustment.

Tech Support  
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bptech@friesens.com

## Feature Books



**Publisher:**  
Todd & Brad Reed  
Photography

**Trim Size:**  
12 x 12

**Pages:**  
384



**Publisher:**  
Edward Burtynsky  
Photography

**Trim Size:**  
12 x 10

**Pages:**  
204



**Publisher:**  
Calgary Jewish Federation -  
Holocaust Ed

**Trim Size:**  
12 x 8.75

**Pages:**  
352

**Point of Interest:**  
Photo book using 4C BW  
images printed on the LED  
press



**Publisher:**  
Deep Snow Press

**Trim Size:**  
11.375 x 12

**Pages:**  
264

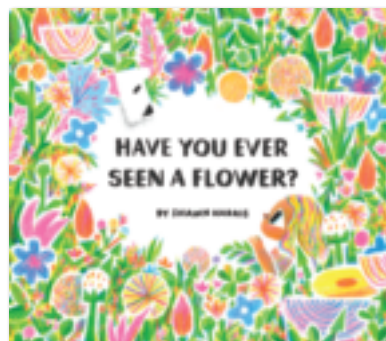


**Publisher:**  
Texas A & M University  
Press

**Trim Size:**  
11 x 10.5

**Pages:**  
184

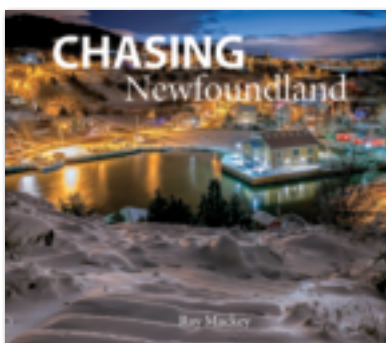
**Point of Interest:**  
Two hardcover versions – one  
heat burnished along with a  
slipcase



**Publisher:**  
Chronicle Books

**Trim Size:**  
11 x 9.5

**Pages:**  
48



**Publisher:**  
MacIntyrePurcell Publishing  
Inc

**Trim Size:**  
11 x 9.25

**Pages:**  
136

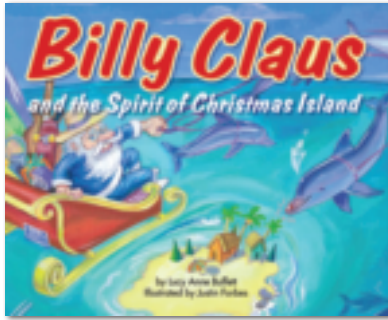


**Publisher:**  
Walkerville Publishing

**Trim Size:**  
11 x 8.5

**Pages:**  
160

**Point of Interest:**  
The rise and fall of Windsor,  
Ontario's original six breweries.  
An account of brewmasters,  
businessmen, gangsters and  
roadhouses, and the impact of  
Prohibition on the local brewing  
industry

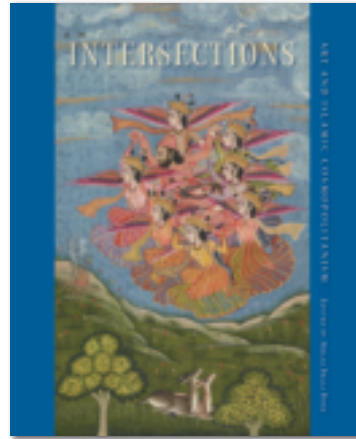


**Publisher:**  
Givington's LLC

**Trim Size:**  
11 x 8.5

**Pages:**  
32

**Point of Interest:**  
Written by Lucy Anne Buffett, sister of famed musician Jimmy Buffett. The story of Santa Claus' beach bum brother, Billy Claus. Full of the lively, beachy artwork that you'd expect from the Buffett family

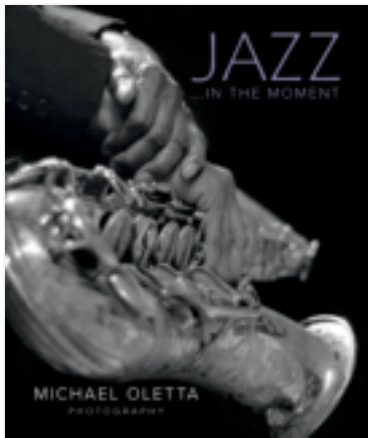


**Publisher:**  
University Press of Florida

**Trim Size:**  
10 x 12

**Pages:**  
248

**Point of Interest:**  
Debossed & foil HC plus a DJ



**Publisher:**  
Michael Oletta Photography

**Trim Size:**  
10 x 12

**Pages:**  
144



**Publisher:**  
Eye of Newt Books Inc

**Trim Size:**  
10 x 10

**Pages:**  
184

**Point of Interest:**  
Filled with beautiful illustrations. A children's picture book as well an adult fantasy / mythology



**Publisher:**  
Fresh TV Inc

**Trim Size:**  
10 x 8

**Pages:**  
32



**Publisher:**  
Goosepen Studio & Press

**Trim Size:**  
9.5 x 11

**Pages:**  
328

**Point of Interest:**  
The cover has a printed front panel and Iris cloth wraps from spine and continues around the back cover. Beautiful full color images throughout printed on GardaMatte Art printed for Lenoir-Rhyne University in North Carolina.



**Publisher:**  
Saint John's Pottery

**Trim Size:**  
9.25 x 11

**Pages:**  
256

**Point of Interest:**  
SC and a HC version and it has an 8-page gate-fold in each. The HC has a Kennet cloth cover with a large gold foiled area



**Publisher:**  
National Geographic Partners

**Trim Size:**  
9.125 x 10.875

**Pages:**  
432

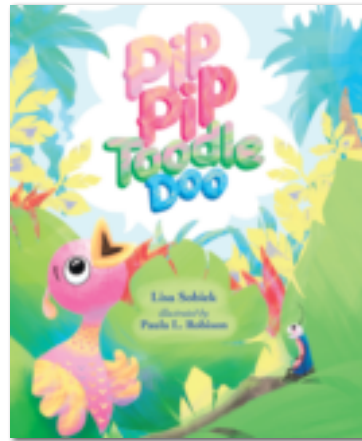


**Publisher:**  
Figure 1 Publishing

**Trim Size:**  
9 x 11.25

**Pages:**  
312

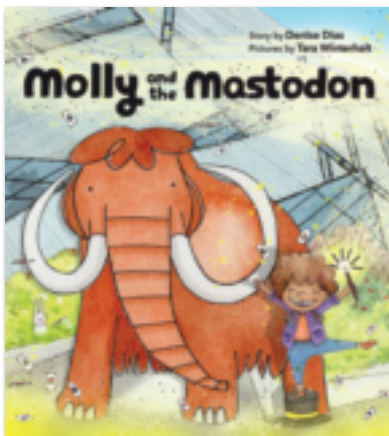
**Point of Interest:**  
Won the Roderick Haig Brown Regional Prize at 2021BC & Yukon Book Prizes



**Publisher:**  
Baobab Press

**Trim Size:**  
9 x 11

**Pages:**  
32

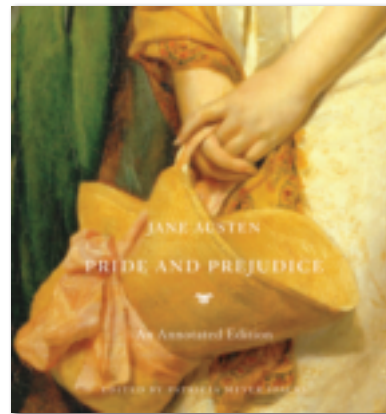


**Publisher:**  
Royal Ontario Museum

**Trim Size:**  
9 x 10

**Pages:**  
32

**Point of Interest:**  
Featuring the Museum's Reed Gallery of the Age of Mammals and the Reed Family Plaza in the cover art. Published with longstanding ROM supporters Nita and Don Reed in honour of their grandchildren.



**Publisher:**  
Harvard University Press

**Trim Size:**  
9 x 9.5

**Pages:**  
464



**Publisher:**  
Hachette Book Group - Nashville

**Trim Size:**  
9 x 9.5

**Pages:**  
48

**Point of Interest:**  
Created for the 20th anniversary of 9/11. It has a DJ that matches artwork of cover, but w/ addl. Emboss and self ends



**Publisher:**  
Fundy Guild Inc

**Trim Size:**  
8.5 x 11

**Pages:**  
32



**Publisher:**  
Dundurn Group

**Trim Size:**  
8.5 x 8.5

**Pages:**  
272

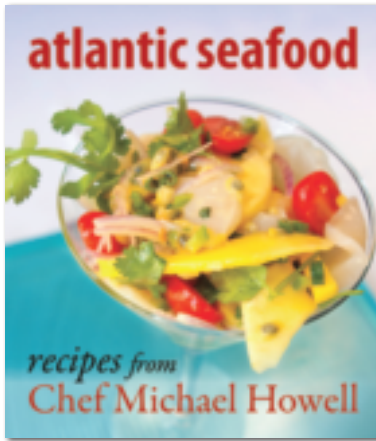


**Publisher:**  
Arboreal, LLC

**Trim Size:**  
8.25 x 11.75

**Pages:**  
264

**Point of Interest:**  
Spot UV, Cool Design



**Publisher:**  
Nimbus Publishing

**Trim Size:**  
8.25 x 9.5

**Pages:**  
144



**Publisher:**  
Penguin Random House  
Canada Ltd

**Trim Size:**  
8.125 x 8.125

**Pages:**  
224

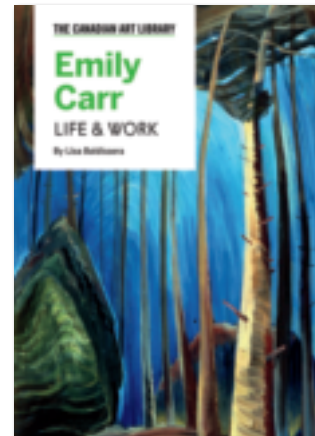
**Point of Interest:**  
Lidia Bastianich's companion to the upcoming public-TV series Lidia's Kitchen: Home Cooking. Recipes for flavorful, no-fuss Italian food



**Publisher:**  
Dorling Kindersley Ltd

**Trim Size:**  
8 x 10

**Pages:**  
264



**Publisher:**  
Art Canada Institute

**Trim Size:**  
7.6875 x 10.75

**Pages:**  
128



**Publisher:**  
Mountaineers Books

**Trim Size:**  
7.25 x 9

**Pages:**  
344



**Publisher:**  
Heartland Associates Inc

**Trim Size:**  
6.5 x 8.5

**Pages:**  
280



**Publisher:**  
Penguin Random House  
LLC

**Trim Size:**  
6.5 x 8

**Pages:**  
304



**Publisher:**  
Ballast Books

**Trim Size:**  
6 x 9

**Pages:**  
452



**Publisher:**  
Wilfrid Laurier University Press

**Trim Size:**  
6 x 9

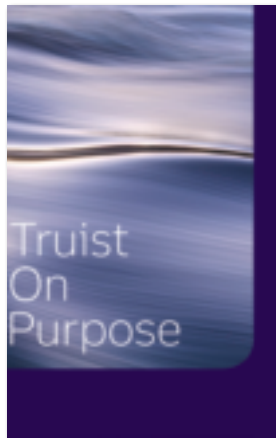
**Pages:**  
432



**Publisher:**  
Simon & Schuster

**Trim Size:**  
6 x 9

**Pages:**  
240



**Publisher:**  
Pace Communications

**Trim Size:**  
6 x 9

**Pages:**  
192

**Point of Interest:**  
Legacy book created for BB&T Bank and sent individually to all 55,000 employees. It has the purple BB&T pantone throughout, spot UV and a small debossed logo on cover



**Publisher:**  
Ouroboros Press

**Trim Size:**  
6 x 9

**Pages:**  
112

**Point of Interest:**  
DJ on uncoated stock, no lamination and it's textured

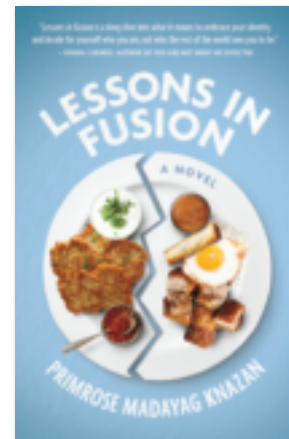


**Publisher:**  
McSweeney's Literary Fund

**Trim Size:**  
6 x 8.5

**Pages:**  
600

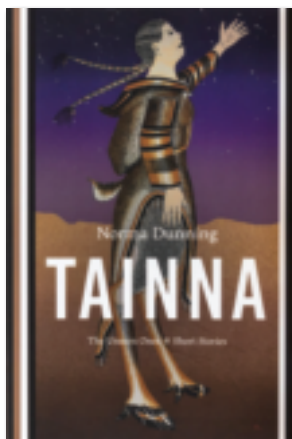
**Point of Interest:**  
They ran 16 different designs for the jackets and the books were sold directly to independent bookstores only. No books were sold through Amazon



**Publisher:**  
Great Plains Publications

**Trim Size:**  
5.5 x 8.5

**Pages:**  
288



**Publisher:**  
Douglas & McIntyre (2013) Ltd

**Trim Size:**  
5.5 x 8.5

**Pages:**  
160

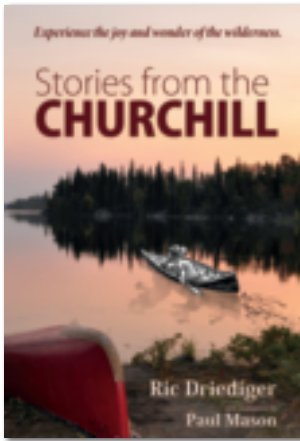
**Point of Interest:**  
Finalist for the BC Publishers 2021 Governor General's Literary Award



**Publisher:**  
Scholastic Books

**Trim Size:**  
5.5 x 8.25

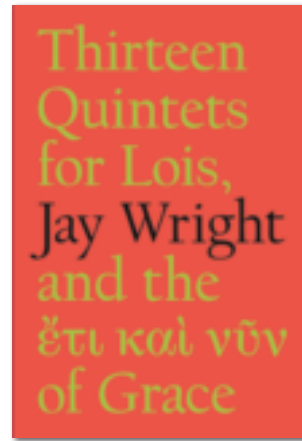
**Pages:**  
256



**Publisher:**  
Ric Driediger

**Trim Size:**  
5.5 x 8

**Pages:**  
224



**Publisher:**  
Flood Editions NFP

**Trim Size:**  
5.5 x 8

**Pages:**  
128



**Publisher:**  
Terrace Publishing

**Trim Size:**  
5.5 x 8

**Pages:**  
52

**Point of Interest:**  
Verona HC with registered debossed red foil



**Publisher:**  
North Star Editions

**Trim Size:**  
5.25 x 8

**Pages:**  
416



**Publisher:**  
Penguin Random House LLC

**Trim Size:**  
6.125 x 9.25

**Pages:**  
688

**Point of Interest:**  
Outlander Series with padded boards and ribbons

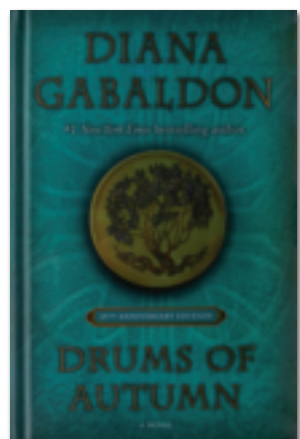


**Publisher:**  
Penguin Random House LLC

**Trim Size:**  
6.125 x 9.25

**Pages:**  
928

**Point of Interest:**  
Outlander Series with padded boards and ribbons

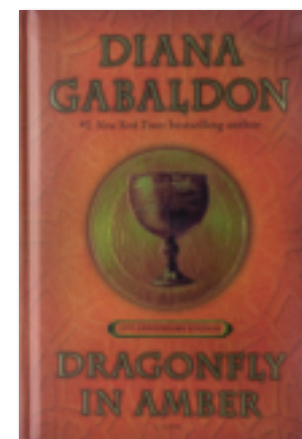


**Publisher:**  
Penguin Random House LLC

**Trim Size:**  
6.125 x 9.25

**Pages:**  
912

**Point of Interest:**  
Outlander Series with padded boards and ribbons



**Publisher:**  
Penguin Random House LLC

**Trim Size:**  
6.125 x 9.25

**Pages:**  
768

**Point of Interest:**  
Outlander Series with padded boards and ribbons



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