

PUBLISHERS'

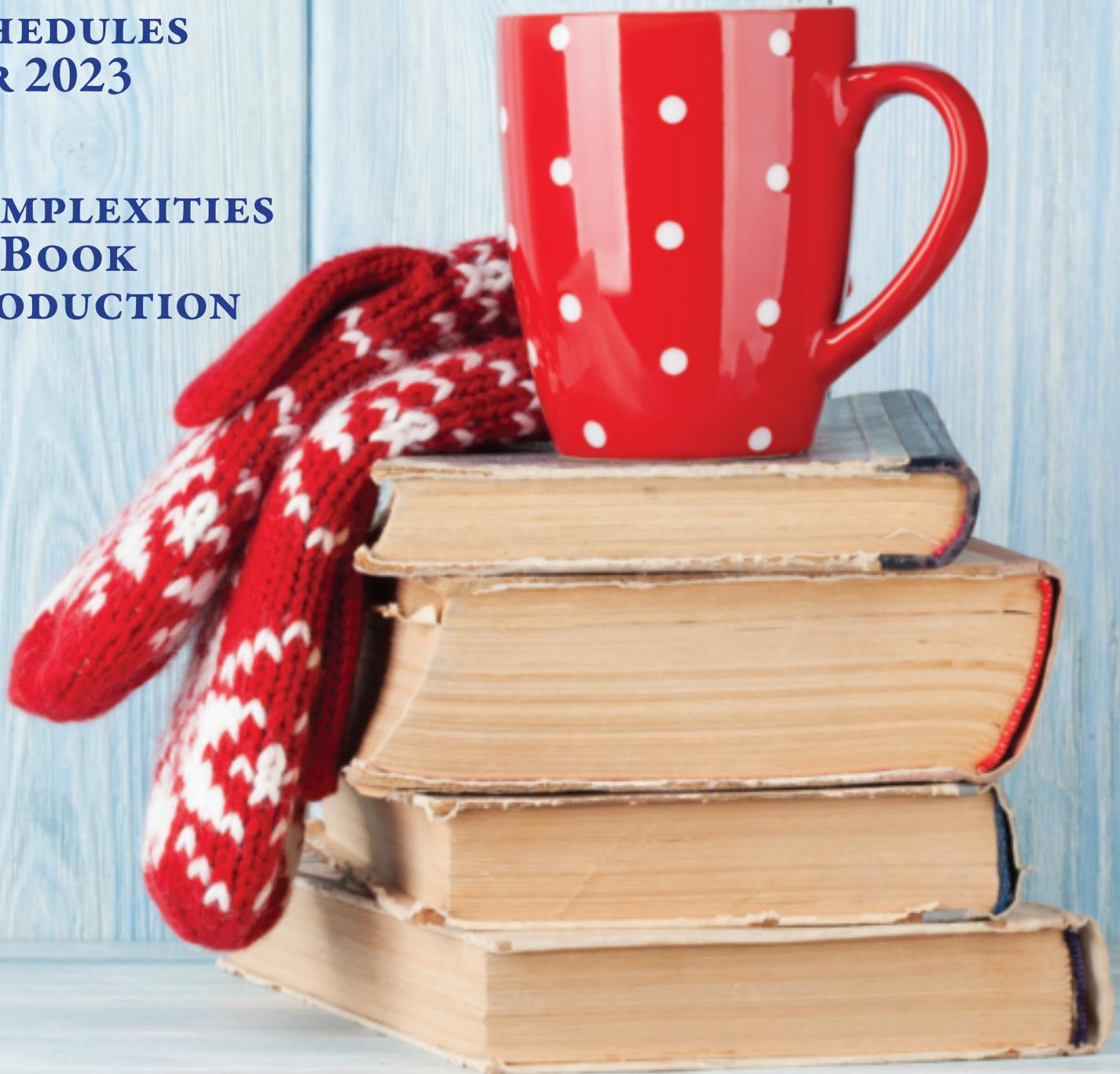
NEWSLETTER

Fall 2022

**PROGRESS ON
CAPITAL PLANS**

**SCHEDULES
FOR 2023**

**COMPLEXITIES
OF BOOK
PRODUCTION**



INTRODUCTION

As I write this intro from a printer's perspective, 2022 is ending, but for most of our customers the biggest part of the year is still coming. Many of the titles that have kept us busy this fall have made it to the warehouses and bookstores for the holiday selling season. I will not mention titles by name for fear of leaving someone off the list, but it seems like every customer has at least one title that they have high hopes for this holiday selling season or for the fall award season.

For us, 2022 has been a year with no downtime, or what used to be a slower period. We hit the ground running in January and it just kept going right through to December. We owe our customers a debt of gratitude for keeping us busy throughout the year, but even more than that we owe you our thanks for your patience, flexibility, and understanding.

Although 2022 was successful for us, it was also challenging in terms of scheduling and raw materials. Paper has previously never been an issue, and it became a very tight commodity with long lead times and what seemed likely to be almost constant price increases. Combined with record demands for limited print capacity, this led to many difficult conversations with customers about delays, price increases, and sometimes using their second or third choices for paper. Our customers responded to all of this with grace and flexibility.

Finally, when we got the book printed, bound, and palletized, there were challenges with finding trucks, but creativity and flexibility again was brought to bear, and the books got to where they needed to be in reasonable time.

Customers felt some of our supply chain challenges when presses or binding lines went down and parts were not available as quickly as normal. Luckily, our in-house maintenance team was often able to come up with work-arounds that helped minimize downtime.

As 2022 comes to an end, what do we see for 2023?

In the last quarter of 2022, we have started to see both some stability in supply and pricing of paper as well as other components that go into a book. We don't see prices dropping by any great amount soon, but stability would be good. Stabilized supply combined with a lessening of demand has allowed us to slide in some quick reprints in the fourth quarter. We like to be busy and loaded, but it is also nice to be able to meet the need for a quick reprint for a hot title or an award-winning book.

While 2023 is heavily loaded, we can see a return to more normal schedules on the colour printing side of the business. The one-colour side is still robust, but that may also see a return to more normal schedules as the year moves along. Keep in touch with your local account manager to see what the situation is, as it will be fluid.

The addition of our new HP Digital Inkjet is almost a year late, but it is coming this March and our capacity will be increased once again. We are looking forward to this press as it adds to both our one-colour and four-colour capacity. To go along with that, our new perfect bound digital finishing planned for mid-year 2023 will allow us to ensure a quick turnaround of books to go along with our existing capabilities.

Another important development for us is the continued enhancements to our scheduling system. The ability to manage the schedules further out and create a placeholder program to help customers to book further out helps us work together to manage delivery dates and stay on top of schedules. We have worked hard to create equitable opportunities to allocate space.

Lastly, with the retreat of COVID-19, it was a real pleasure to be hosting more customers in the plant again this year.



We wish you a successful holiday selling season, and we thank you for all the trust you have placed in us in 2022.

From our families and staff to yours, have a safe and happy holiday season.

Doug Symington

PAPER, PAPER, PAPER

Andrew Fennell

Paper Supply Challenges

While there is still an imbalance between supply and demand for paper, the paper delays and shortages that we have experienced over the last eighteen months (and the unrelenting price increases) have abated! In addition, trucking and shipping issues have dissipated considerably, although the high cost of fuel is still with us and is contributing to the stickiness of high prices.

The light at the end of the tunnel is more visible now as we are hearing from paper mills and merchants on occasion that paper availability is improving. I am approaching this cautiously because mill inventories are still at historically low levels and virtually all mills are still on allocation. This tells me that while the market is stabilizing, paper prices are not yet softening, and paper availability is still fairly tight.

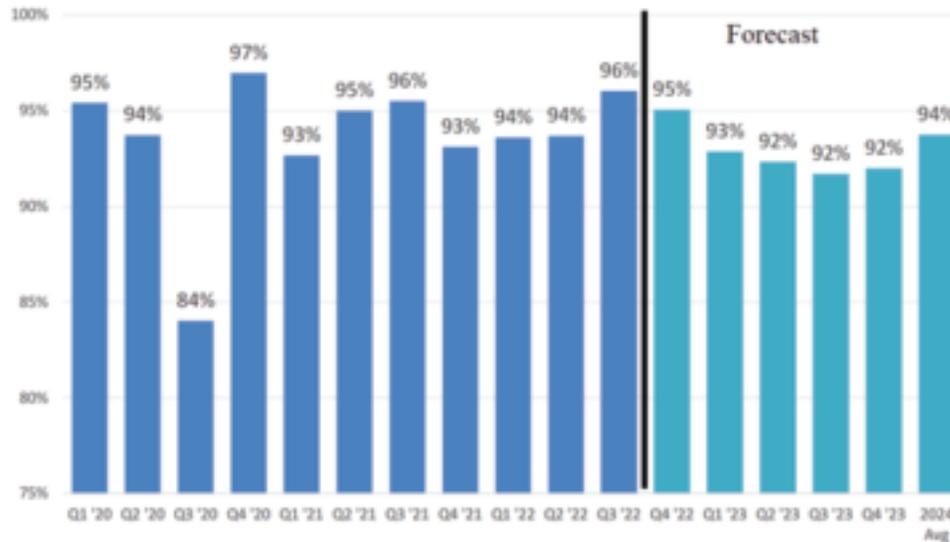
The exception to this is paper manufactured in Europe. The cost of energy is soaring, and the imbalance between supply and demand for paper is still significant. Prices are definitely not abating for European paper. This is from Quad's recent Paper Market Update:

In 2023, paper imports from Europe will continue to be impacted by the high costs of natural gas and electricity resulting from the war in Ukraine. These high costs are expected to last for the next two years in Europe and could lead to further mill curtailments in that region.

Paper Mill Operating Rates

As mentioned above, the North American paper mills seem to be stabilizing. One key metric that is a strong indicator of the mills' busyness, and paper availability in general, is operating rates. One example of this stabilizing trend was published recently by Sappi North America. This chart is from their end-of-October report (data source: RISI):

SBS Operating Rate Forecast



What this indicates is that while operating rates are still expected to be in the nineties throughout 2023, there is an expected waning of demand (at least for SBS paper [premium paperboard]), and that waning of demand will be reflected in the mills' operating rates, which should translate into better paper availability.

Other Paper Industry News

Here are a few paper industry updates that may be of interest to you:

- Resolute stockholders approve Paper Excellence merger proposal
- The Prince Albert (Sask.) pulp mill prepares for construction
- Rayonier announces acquisitions in the US South (acquiring approximately 172,400 acres of high-quality commercial timberlands located in Texas, Georgia, Alabama, and Louisiana)
- Sappi accepts offer to sell three European graphic paper mills

THE ONLY CONSTANT IS CHANGE

Byron Loeppky

The changing colours of the leaves on the trees is giving way to the leaves nestling on the ground. Snow is not far off. The crops are almost all in the bins, and it was a good harvest season here in Southern Manitoba. The Winnipeg Blue Bombers football team is preparing for a long playoff run (two wins in the playoffs will make them the champions for the third year in a row) and the Winnipeg Jets have opened their NHL season to a better than average start. This is fall in Manitoba, where the dream of a Grey Cup and a Stanley Cup residing in our province in the same year is still alive.

The theme from the last few Publishers' Newsletters is changing. Schedules are beginning to shorten, capacity is opening, raw material supply has been stabilizing, and the opportunity for some short-turnaround reprints is possible. What hasn't changed is the increase in the cost of raw materials or an abundance of labour.

In the last newsletter, I referred to unprecedented date moves due to delays in material to the plant, primarily paper, board, and cover material. Some updated data shows that YTD in 2021 we had 290 date moves because of unavailable material, which was a historically high number. In 2022, we have already had 1,331 date moves due to delays in material arriving. The good news is that in the last four months we have only had seventy-one moves, which means we are more in control of hitting schedules than we were earlier in the year.

We know extended schedules are a challenge, and we are working overtime to shorten schedules in the last few months of the year to give opportunities for some quick reprints this fall. Date moves continue to be higher than we are comfortable with, but we believe the next two months will be significantly better than the last two.

The negative impacts of COVID-19 on our team has improved over the summer months, but we have noticed a significant increase in staff out sick again this fall. We are monitoring the situation carefully to see if any additional measures need to be reinstated.

Corporate travel began in the second quarter, and customers are once again coming to the plant for press checks. We have been attending trade shows, book fairs, and factory visits for equipment investigations. While we're not back to pre-Covid times, our patterns are returning to a more usual cadence.

Our annual Book Division planning session took place on November 2 and 3, and we evaluated the three-year plan we created last year and strategized what changes, if any, we should make going forward. In general, we are making only minor tweaks to our plan with the three WIGS (Wildly Important Goals) being:

- Inspire people to grow with us
- Improve systems to grow efficiently
- Enhance customer experience

We could not accomplish what we do without our committed staff, who have been flexible and conscientious. They have worked over sixty thousand hours of overtime to get out the work we had committed to producing. We are incredibly grateful for the fantastic team we have both in the plant and representing us in the field.

As always, 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 busy end to 2022.



PROGRESS ON CAPITAL PLANS

Byron Loeppky



Left to right:

Andy Fetherman (Muller Martini), Bruno Muller (MM), Andrew Fennell (Friesens), Steve Voth (Friesens), Steve Gardner (MM)

The picture above left was taken at Printing United in Las Vegas where Muller Martini announced that Friesens would be the first North American user of the SigmaLine Compact. The expected delivery date is early summer of 2023. The line will be connected to run inline with the HPT250 HD inkjet press, which is scheduled to arrive late in the first quarter of 2023.

The Muller Martini Allegro Perfect Binder arrived in August. It has been installed and is up and running at our IP facility. This is a third perfect binder for Friesens, and this is the first time in our history to have three. This will add significant capacity moving forward.

We are on the verge of a couple of large capital announcements that are not quite ready for this newsletter. Please stay tuned for these announcements to be made in our spring edition.

Our capital budget has not been approved for 2023, but it is possible that it will be one of the largest, if not the largest, in our history. Part of the reason for this big increase is the rising cost of equipment. Some equipment we are investigating is more than double the cost of what it was only ten years ago.

While we wish capital purchase prices would be lower (as I know you do too), this is the price of being in a capital-intensive business, and we are committed to reinvesting in our core book business. This budget should send a strong message to the market that we are going to ensure Friesens is among the most modern, efficient, and safe manufacturing facilities in the world.



COMPLEXITIES OF BOOK PRODUCTION

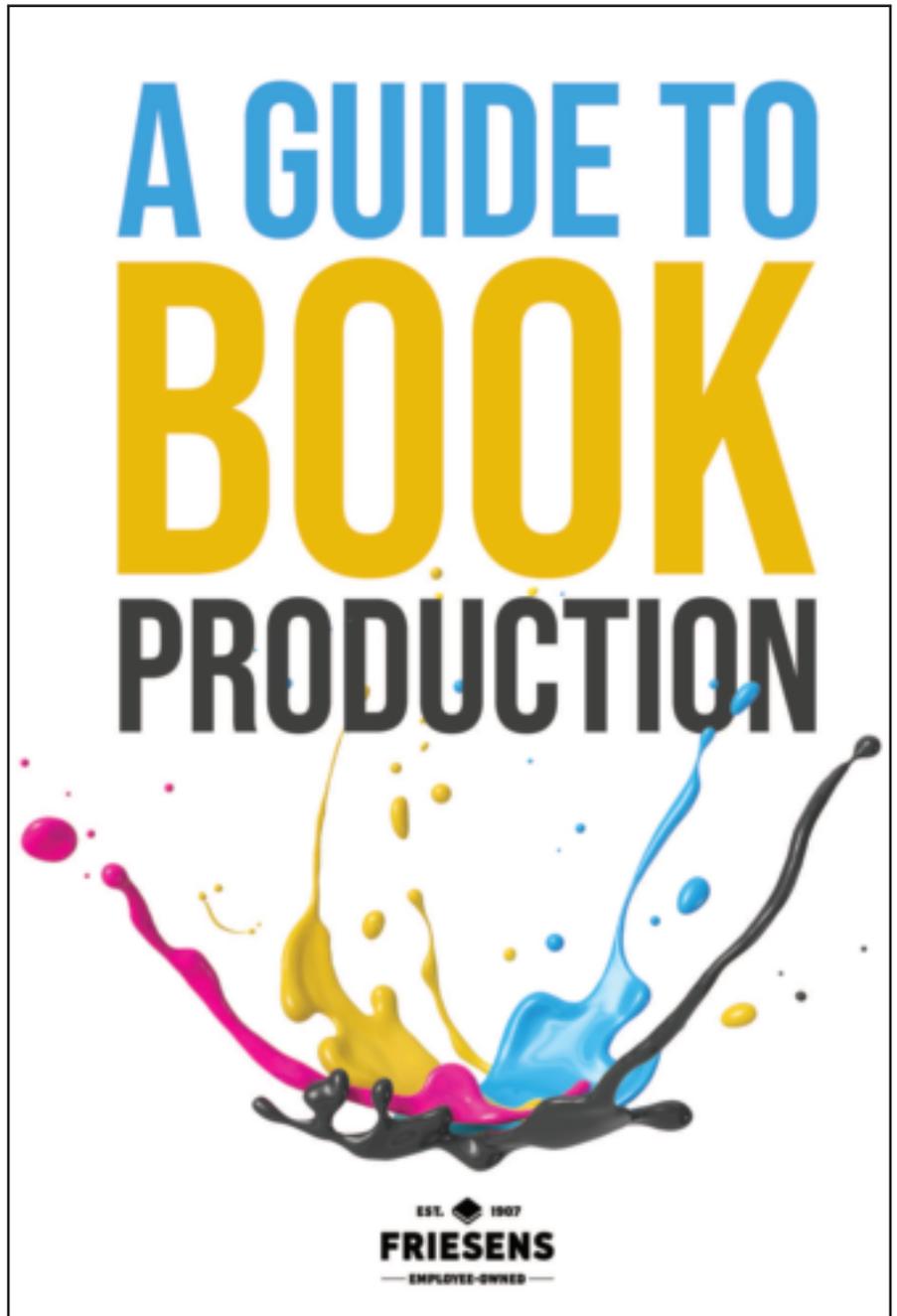
Book printing is a complex and unique industry with many components and moving parts. Beyond the intricacies of authors writing their stories and getting published, we deal with what comes next: book production.

In order to bring that manuscript to life and give it the recognition and audience it deserves, there are many factors to consider, especially for those involved in book production. For example:

- Will the book be hardcover or softcover?
- Does the book need a dust jacket?
- What type of paper will be most effective?
- Is there a particular binding method that would work best?
- Why is colour management so important in a printing project?

These questions are only the tip of the iceberg, so to speak, when considering all the various aspects of book production. To make this process easier, Friesens is offering their latest edition of A Guide to Book Production. This book offers simple and straightforward answers not only to the questions above, but also provides guidance as you make informed decisions about what is best for your project.

Since the world of printing is an ever-changing environment, we ensure that our plants are operating with the latest technology and procedures while utilizing eco-friendly practices that better improve the printing experience for our customers. For your knowledge and peace of mind, we encourage you, the story-teller, to take a moment to explore this informative guide to book production.



Please contact your Friesens sales representative if you would like to receive this updated version.



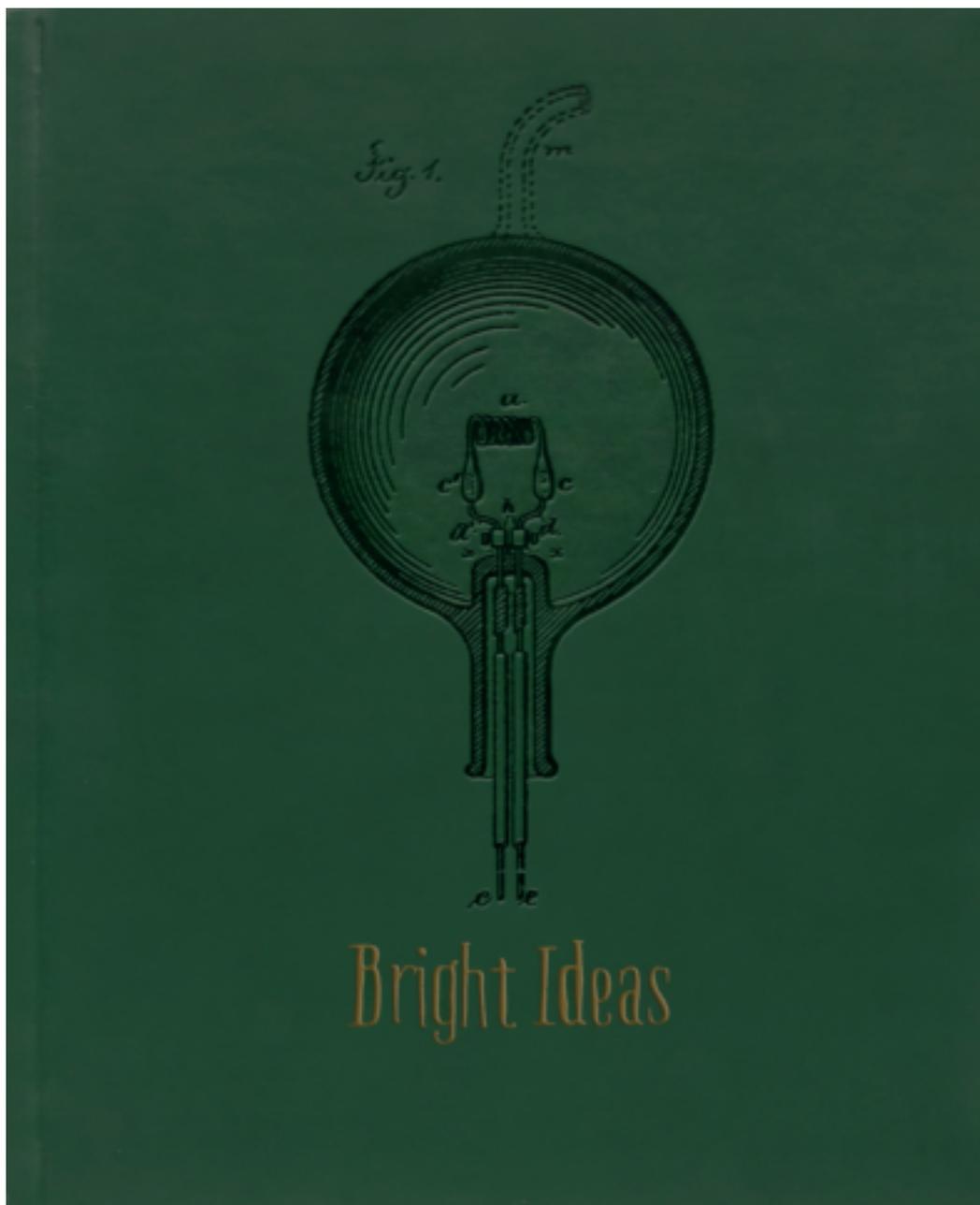
BRIGHT IDEAS JOURNAL 2023

As we begin our descent into 2023 and all the plans for the New Year begin to take flight, the hard-working team of employee-owners here at Friesens unveils this beautiful journal, worthy of the journeys you will take in the coming year. Fittingly entitled “Bright Ideas,” this journal has truly been a labour of dedication and ingenuity. From beginning to end there were obstacles and complications threatening to stop the production in its tracks, but the initial vision and the determination of many hands helped to bring this project to completion, ultimately creating a work of art worthy of the name Friesens.

As you pick up the book, you will notice some distinct features that make this journal stand out. For example, the original design of the light bulb is burnished into the Alpha Skiver with the title foil stamped in gold. Once you flip the book over, you will see the perfectly registered two-tone logo, compliments of our talented Friesens foil stamping technicians. A new feature in 2022 is the sewn flexibind cover with square back spine and headband with a 3/8 inch green ribbon.

Our team of employee-owners that worked on this journal took extra care to give you a gift that will proudly capture all the wonderful things you will experience in 2023.

Copies will be mailed and handed out during the month of December as a thank you for your trust and support in 2022.



THANKSGIVING THE EMPLOYEE-OWNER WAY

It was a great Friesens Thanksgiving this year, as we were able to pull out the employee-owner days banners, set up the food tables and hand out the celebration meal like we did way back in 2019. Staff were happy and thankful as they received their pizza, salad, and brownies from Friesens Management and The Friesens Board of Directors. It was a busy couple of days for our Culture Club, as we were able to serve 139 pizzas, to 496 employees-owners, over two days. What an amazing way for us to connect again.





PANTONE COLOURS

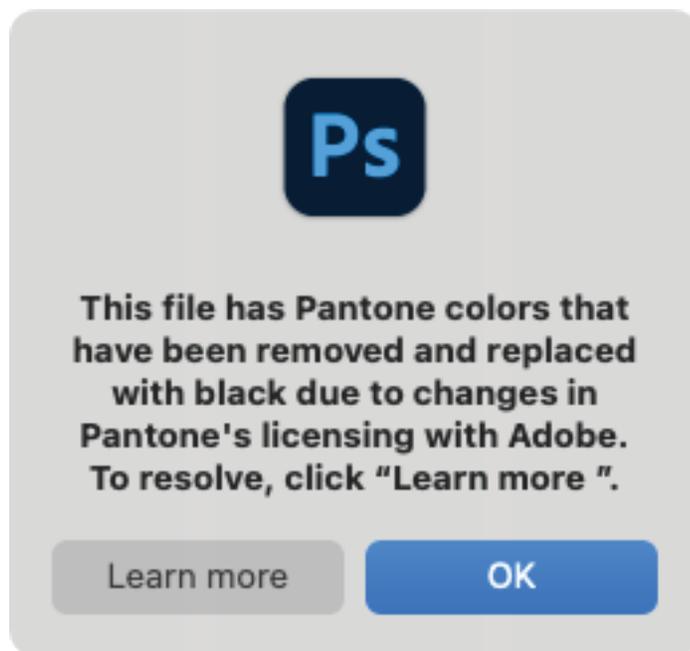
This appears to be a year for changes in Adobe products. Being a subscriber of the Adobe Creative Cloud, I am accustomed to seeing a regular stream of updates. Generally, the changes are subtle and may even go unnoticed. Recently I wrote about the changes coming to Adobe products where Type 1 fonts will no longer be supported in Adobe applications. This change is coming on the heels of another change that has already been implemented in Adobe applications. This change comes in the form of a change to the Pantone libraries that are available in InDesign, Illustrator, and Photoshop. Like the change to the Type 1 fonts, the Adobe applications have started displaying notification banners along the bottom of the application screen to draw our attention to the coming or implemented changes. These notifications only appear when the specific document is affected by the coming change. For example, if the document is using Type 1 fonts, the message about font changes appears. Opening a document that has spot colours may result in the display of the Pantone colour message.

For full Pantone colour support that allows for an extensive range of Pantone libraries, an extension is needed. Pantone Connect is the plugin that provides this functionality. The Premium subscription is listed at \$19.99/month if on a monthly subscription. For an annual subscription, the price drops to \$9.99/month. This adds a significant cost for functionality that traditionally was included within the Adobe products. It appears that the consumer is the one that bears the cost of this parting of ways for Adobe and Pantone. Regardless of how we try to spin this change, the end result is a less integrated experience with another recurring cost deferred to designers. At this point, we are still evaluating if Pantone Connect provides value in our environment and how many workstations would benefit from a subscription.

The Pantone licensing change with Adobe has already taken effect. Here I will explore several of the applications to see how they are functioning without signing up for the Pantone Connect subscription. This

will show some of the challenges you may encounter now that this change has been implemented. Note that if you typically avoid using Pantone colours, this change will likely have very little impact on your daily routine. In the event that you do work with Pantone colours, you may see some changes depending on the specific situation. The experience with this licensing change will be different depending on which application is using Pantone colours.

In order to test the effects, I have created several files in an older version of Photoshop. To test Pantone colours, I created a duotone using Black and a Pantone colour. I also created a multichannel file where I also used a Pantone colour for one of the channels. When opening the duotone, Photoshop displays the following warning. Opening the multichannel file produces the same warning.



Adobe Photoshop warning when opening a duotone

It is a little disturbing to see the preview colour for the duotone changed to black. This alters the visual appearance of the duotone. Fortunately, the spot colour channel still exists. It is only the colour preview that has been altered. The next step is to restore the spot colour preview to the proper colour. Using the Color Picker, selecting CMYK, LAB, or another colour library are all options.

i Some Pantone colors may no longer be available due to changes in Pantone's licensing with Adobe.

Adobe InDesign warning message



Adobe Photoshop Pantone Library options

Photoshop has a reduced set of Pantone libraries, but appears to maintain a limited set that includes:

- PANTONE+ CMYK Coated
- PANTONE+ CMYK Uncoated
- PANTONE+ Metallic Coated
- PANTONE+ Solid Coated
- PANTONE+ Solid Uncoated

By selecting the PANTONE+ CMYK Coated library, I was able to select the proper Pantone colour and restore the visual appearance of the duotone. These libraries seem to be limited and do not contain all the colours that are available in my physical Pantone swatch book. If this happens to be the case for the colour used, an online search for the LAB or CMYK values may produce an acceptable simulation for screen. If the accuracy of the screen simulation is critical, a subscription to Pantone Connect may be necessary. If colour accuracy is not as critical, a replacement colour can be selected using the Color Picker. Oddly enough, this altered image maintains its colour even when it is opened in Photoshop a second time.

After creating a new document in Adobe Illustrator, I checked to see if any Pantone colour swatches were available. After a little searching, I was able to locate the same limited set of five libraries that were available in Photoshop. These libraries can be selected from

the Swatches palette menu. Access these libraries using Open Swatch Library, Color Books, then select Pantone Library item.

Moving on to Adobe InDesign, I placed both the old Illustrator EPS and Photoshop duotone into a new document to see how they would perform. InDesign imports the Pantone spot colours from the placed graphic and adds them to the Swatches palette the same way it has in the past. Of interest is that the Pantone colours maintain their colour previews. As a result, the duotone and Illustrator placed images retain their proper spot colour preview. For placing existing images, the change in Pantone support does not make any difference.

Placing existing images that contain Pantone colours has minimal impact on the process. It is only when adding new colours or editing images in Photoshop that the full impact of the licensing change is felt.

Since this issue with licensing is specific to the relationship between Adobe and Pantone, I thought it was worth exploring the competitors to see if the Pantone Libraries are available.

I first checked out QuarkXPress to see how the list of Pantone Libraries compared to InDesign. QuarkXPress includes over three dozen Pantone Libraries to choose from. Colours that were no longer available in InDesign were still selectable in QuarkXPress. Next, I checked out Affinity Publisher and explored the Swatches for Pantone options. Here there were a dozen libraries to choose from. Similarly, colours missing from the Adobe products were available in Affinity Publisher.

Much like the transition from purchased software to subscription based software, this has created a fork in the road. Some designers decided to camp out at the last version of InDesign before the subscription rolled out. Others decided to look for alternative design software. Once again, we are faced with a proposition of adding another subscription to continue to use the software features we have come to rely on. This may create another fork in the road that will motivate designers to part ways with Adobe. The bright spot about the landscape today is that the number of viable alternatives has increased.

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FRIESENS SUPPORTS LOCAL ARTISTS IN THE COMMUNITY

Tracy Robertson

Friesens has been a proud supporter of the local art community for several years. Since the seventies and eighties, Friesens has purchased original artwork from local talent in the form of paintings, sculptures, textiles, and creative natural elements, recognizing it not just for its aesthetically pleasing qualities within the offices, but for the fact that art is always viewed as an investment and a valuable commodity in any culture or part of the world.



Vern Zacharias

Over the years, Friesens has accumulated more than one hundred original pieces of art, including some from our very own employee-owners such as Vern Zacharias (press operator) and Steve Penner (former corporate graphic designer). These employees have not only used their artistic abilities within the company, but have used art as a way of expressing themselves in their private lives.

In 2006, Friesens became more involved with the art community by introducing a local gallery. It started as a conversation with the Town of Altona to decide on a project that would enhance the community as well as mark Friesens' one-hundred-year anniversary in 2007. The conversation soon had an objective: an art gallery to showcase the abundance of local talent in Altona and surrounding area. Soon the idea found a home in the form of the historic Schwartz house. The plan was to convert it into an indoor gallery, with expansive outdoor grounds featuring large format bronzes and sculptures. Gallery in the Park had its unforgettable grand opening in July of 2008 with overwhelming community support, and that support remains constant.



In its early days, Gallery in the Park retained Odia Reimer as its first curator, and in a previous interview, she related her experience: “Little did I know that moving to Altona and working at Friesens Yearbooks, I would have a wonderful opportunity to help start and curate the gallery. The gallery has been a growing experience for me, from finding sculptures, calls for submissions, culling and hanging art ... the largest part of the journey has been finding the artists to exhibit in the gallery ... each year we reach out to prominent artists we have connections with, or artists we would like to see in our gallery.”

With the Gallery maturing, expanding, and deepening its roots in Altona, a whole new generation of artists will continue to enjoy displaying their work in this inviting environment.

In addition to the Gallery, Altona and the Pembina Valley area host a number of artistic residents who showcase their talent in private homes and studios. Each year there is a self-guided studio tour that enables visitors to meet some of the region’s best artists right in their own creative spaces. Gallery in the Park is part of this event, and supports it in every way. It’s amazing to see how the community comes alive during these occasions as they help shine a spotlight on those special people we call artists.





UPDATING PACKING PROFILES

Ralph Hamm

Several recent communications with different customers reminded me of the importance of discussing and updating packing profiles. At Friesens, we work with a wide variety of customers. Some customers are very familiar with packing profiles, and others might be questioning what it is and why it is important.

Each distributor, retailer, and storage facility might have specific requirements for how books should be packed, what content needs to appear on the carton label, or on the shipping paperwork. This is the basic, overarching information that makes up a packing profile. A profile can also be quite specific and detailed. Some warehouses will provide specific information on carton sizes, carton label location, specific pallet sizes, maximum pallet heights and weights, etc. The book manufacturing process is becoming more automated, as are the warehouses that receive and store the books for future distribution. Handling this product efficiently on both sides of the equation is important to us, to you, and your distributor.

Warehouses or distributors that have detailed requirements will have a guide or manual. It is important that you review this document so that you are aware of their requirements. Failure to

follow their guidelines can result in fines or service fees to correct the error. After you have reviewed the document, it should be forwarded to your Friesens book project specialist. We use the information that is relevant to our production and shipping practices to create a profile. This database is attached to each one of your projects and is referenced electronically by all packing and shipping staff.

Your distributor might also create profiles for each of the titles they receive, such as the number of books per carton for each full carton of a specific title. They might also record the country of origin. It is important for you to communicate if there are changes to your distributor if titles are moved from a print location in the US to Canada.

On average, we ship over one hundred different titles each week. Knowing the requirements for packing and shipping allows us to manage this portion of the production process efficiently. Getting a quality product at the end of the production process is a central focus of customers. Working with and understanding the packing requirements may seem like a minor detail when bringing a book to life, but attention to these details will prevent delays in getting your books distributed after they are in the warehouse.

Please contact your Friesens book project specialist if you require additional information or need assistance in deciphering instructions you've received from your distributor.

SCHEDULES FOR 2023

It has been a roller-coaster ride for anyone involved in book production over the past two years. After feeling the effects of material supply challenges, price increases, and a shortage of printing and binding time, we feel as if the pendulum is starting to swing back toward normal. As such, we want to give you a brief synopsis of what we are currently seeing and what this means for schedules in 2023.

Material Supply Chain

For the past eighteen to twenty-four months, we were on allocation for many papers. This was for uncoated and coated papers as well as other raw materials such as printing plates, glue, and ink. We have felt a shift in the past couple of months in which the availability of materials have been opening up and opportunities are presenting themselves that allow us to bring in additional materials to meet customer schedules.

Sheetfed Colour Schedules

Looking ahead, we see a balance between supply and demand with pockets of press and binding time becoming available for quicker schedules. What does this mean for you? It means reprint schedules or special schedules that need quicker turns are now becoming possible. No longer are we saying you must book four to six months out just to have a place at the table. We are saying yes to more and more projects within what we call “normal schedules.” For example, as we publish this in mid-November, we are still able to ship some reprints and new titles in time for

Christmas. While inventory of raw material is not unlimited, we have added considerable inventory to help us say yes to more requests. Of course, we continue to encourage publishers to work a few months out and book our lists well in advance to ensure materials and press times are available. But, the good news is there are pockets of available space as we head into 2023.

Web Monograph Schedules

The trade book market continues to be the most robust. Lead times are still stretched out to longer than normal due to demand for web printed books. While 2022 trade book sales are lower than they were in 2021, we still see strong bookings and demand from publishers. We continue to encourage you to look four to six months out and book in your lists to secure some press time. This also allows us to determine material volume needs and prepare in advance with our suppliers. There has been some good news in that raw materials are more readily available and the issues we saw for much of 2021 and 2022 are much improved. Delays we experienced due to paper shortages have subsided in most cases with standard stocks. Of course, anything unique still takes more time to bring in. These changes have also helped us when small print capacity opens up due to project delays, and have helped us satisfy some quicker reprints and schedules on a limited basis.

As we head into 2023, we ask that you continue to connect with our account managers and work together to plan ahead.





FRANKFURT BOOK FAIR OCTOBER 19–OCTOBER 21, 2022

Doug Symington

The Frankfurt Book Fair returned to a pre-Covid footing in 2022, and the relaxed COVID-19 restrictions with regard to travel made for robust attendance numbers. So, when the fair opened on October 19, there was a palpable sense excitement of being together again to celebrate books and all things publishing.

Spain was the guest of honour for 2022. In 2021, Canada was the guest of honour, and unfortunately that role was hurt by the lack of attendance due to COVID-19 travel restrictions. The country who is the guest of honour has their publishers and literature celebrated and featured throughout the fair.

In 2022, 93,000 trade visitors attended the fair, which was up from 36,000 in 2021. The fair is open to the public to purchase books and see what is coming in the way of new titles. Eighty-seven thousand visitors from the public attended the fair in 2022, up from 37,500 in 2021.

The attendance was about 70 percent of the fair in 2019, before the pandemic.

The most prevalent feeling was that in-person meetings and presentations were a welcome way to begin to restore, expand, and form new relationships.

All the Big Five publishers—Penguin Random House, Harper Collins, Hachette, Simon and Schuster, and MacMillan—were back with full North American contingents in addition to their European colleagues.

While Covid may be in retreat, the ongoing war in Ukraine was not far from the minds of most attending the conference. Special attention was given to Ukraine. President Zelensky addressed the conference via video. His message was about the importance of publishing as an instrument of recording and reporting on the events in Ukraine. A stark reminder of the situation in Ukraine that was mentioned in the daily newsletter for



the fair was regarding several attendees who had brought iodine tablets with them in case of radioactivity if some sort of nuclear event were to occur in Ukraine during the fair.

Chinese publishers and printers were not there due to continued zero Covid restrictions in China. The Chinese printers usually have a very large presence at the fair. Russia was not present due to the war in Ukraine.

While the overall feel and vibe of the conference was positive, there were some concerns mentioned by many publishers.

Many publishers wanted to get a better idea of the stability of the paper markets and print capacity. Planning so far out, the instability of the paper market and the increasing cost of manufacturing pressure has stressed publishers. The inability to get quick reprints has many publishers printing long print runs, and warehouses are full of books. Many questions were asked of us as to what we are doing to increase capacity in the North American market.

The continued increase in energy costs is challenging paper and print manufacturers in the European market.



The Canadian booth was well staffed by many Canadian publishers, who were both selling foreign rights to their titles and working to acquire titles that have potential in the North American market.

In talking to all the publishers, the general feeling was that the success of 2022 will be determined by the next six weeks of sales, as many large and significant titles were released in November for the Christmas season. 2021 was a record year, and while no one is expecting the pace to be maintained, the hope is that a robust holiday selling season will bring the year to a successful close.



KUDOS

RISING FROM THE ASHES

The box of Rising from the Ashes approval copies just landed on my desk, and the books look fantastic! They are approved, please proceed with the bulk shipment going to Chicago.

Thanks so much to both of you for all of your help with this project. Everyone is absolutely thrilled with the end product!

Stephanie Thompson, The University of Tennessee Press

IN THE NAME OF WILD

I was so very excited to receive my copies of this book. It looks fantastic – even and especially the colour section

best,
Ann Macklem, UBC Press

CELTIC COLOURS 25

Just wanted to send along a quick note to let you know that we are over the moon with the quality of our Celtic Colours books.

Thank you so much for all your work and guidance on this project.

Wishing you all the best
Jason at Celtic Colours International Festival

LUMINOUS

Linda and I were very pleased with the quality of the printing of her art book “Luminous” at Friesen’s.

Please extend our thanks to your colour specialist, printers, bindery, and final packaging people. They worked very hard to fulfill her/our wishes. The colour matching was superb. The state of the books, the packaging and delivery time were excellent.

It’s been an incredible journey.
Jo Blackmore of Granville Island Publishing

GREAT NORTHERN IRON

A final comment to pass along is that I’ve had dozens of positive comments about the high quality of the book’s printing job. If I ever do another book, I would certainly want Friesens Corporation to do the work.

Jim Stolpestad, White Pine Press

THE PASSENGER

We are thrilled how great a job Friesens did with the first leg of the long Cormac McCarthy journey we’re taking over the next few months!

You make nice books! Overwhelmed victims of your own success in fine book making.

Thanks,
Andy Hughes, Penguin Random House, USA

WISCONSIN WATERS

I’m over the moon excited having just reviewed the Wisconsin Waters advances. They are just gorgeous! Thank you so very very much to the Friesens team for making this such a beautiful printed book!

Have an awesome day!
John Ferguson
Production Editor
Wisconsin Historical Society Press

WOMAN WITHOUT SHAME

Good morning, Marc, and Glenda,

I just wanted to share some of the praise we received from our author on her finished books! She is truly delighted with how beautiful it came out, and so are we! Thank you so much for helping to make one of our authors very happy.

Marisa N. Melendez
Production Supervisor
The Knopf Doubleday Publishing Group
Penguin Random House

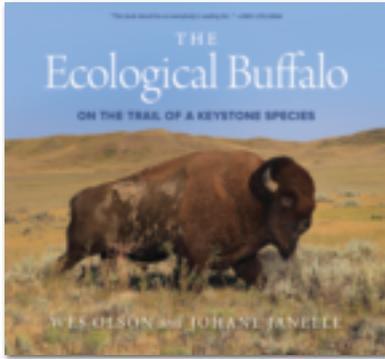
CRAWFORD BOXED SET

Thank you! The Crawford boxed sets look fantastic. I am so happy with how they look, and how great each element came together in the whole. Your crew did a wonderful job putting together these sets. Please pass along my sincere thanks to everyone who had a part in this job. I want to thank you three as well for your extra guidance helping me to figure out each aspect of this project, as I’ve never done anything like it! Your assistance from start to finish was instrumental and the whole thing ran so smoothly—from my end at least, so I hope so for you, too.

Here’s hoping it is a hit with Dr. Crawford’s fans, though I can’t see any reason why they won’t love it!

My best,
Liz Wilson
Production Director
Hackett Publishing Co.

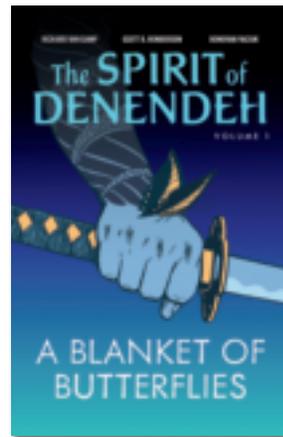
FEATURE BOOKS



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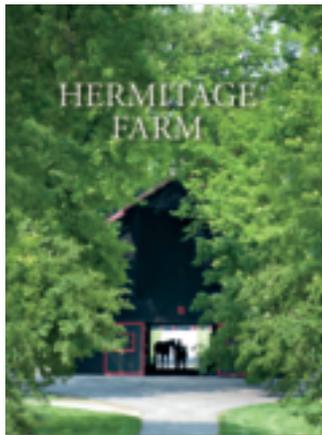
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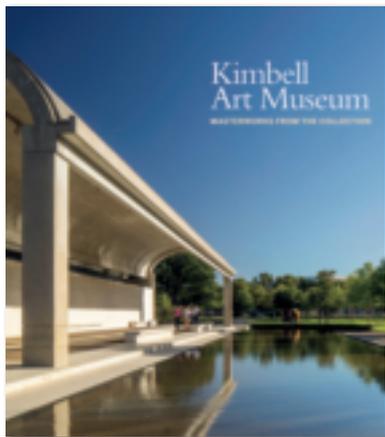
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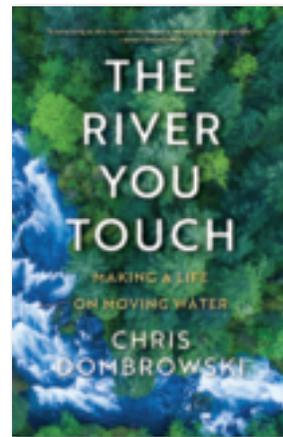
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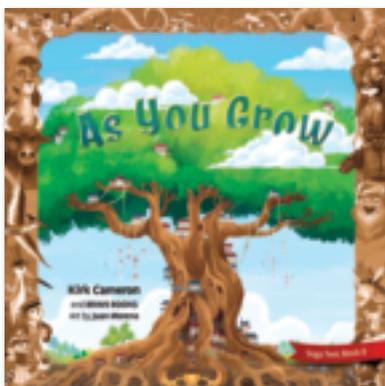
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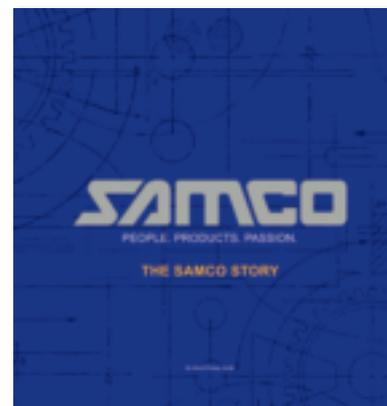
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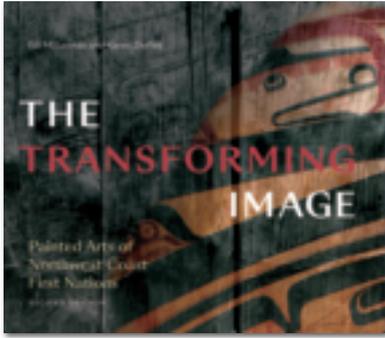
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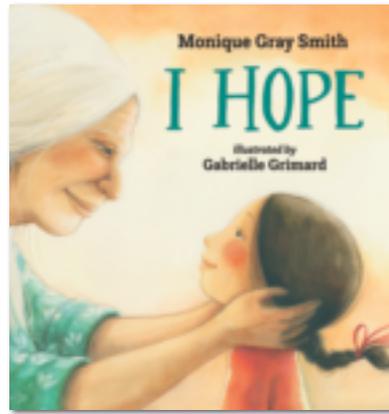
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Figure 1 Publishing

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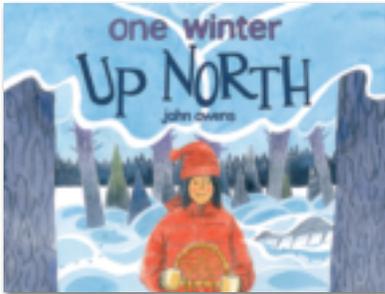
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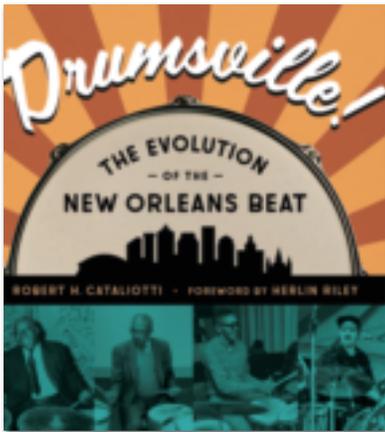
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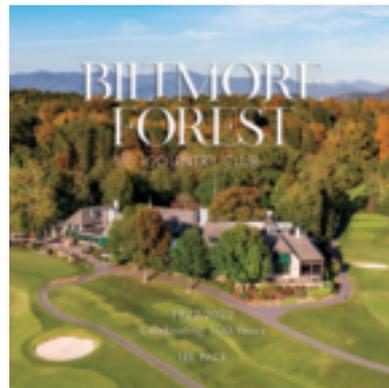
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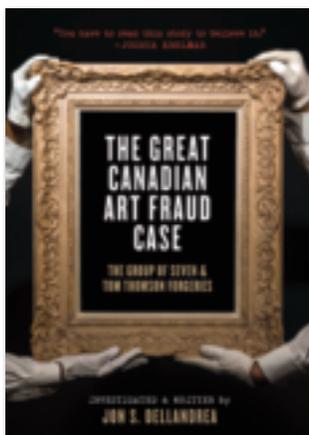
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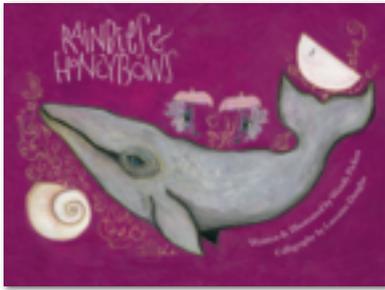
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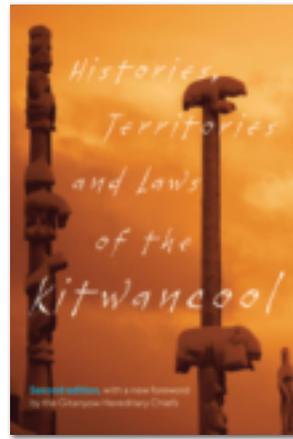
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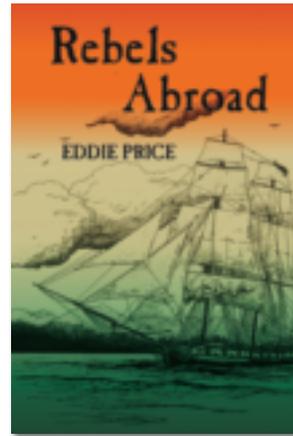
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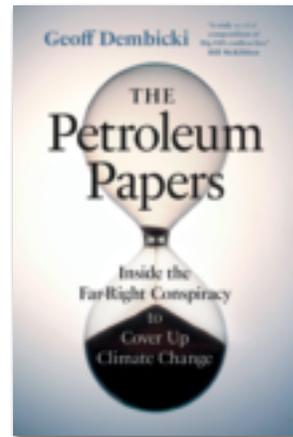
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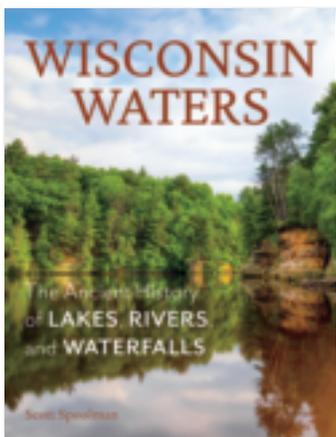
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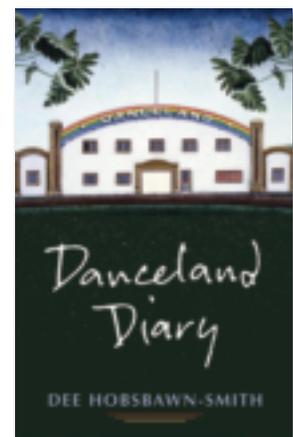
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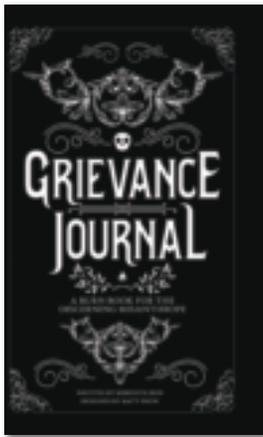
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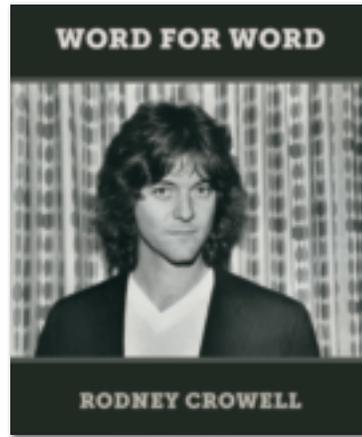
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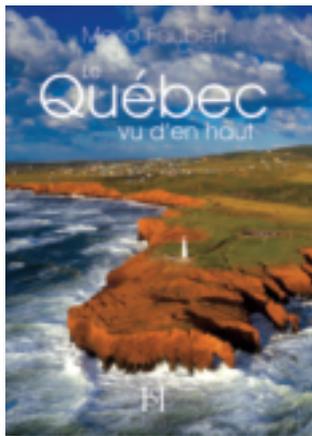
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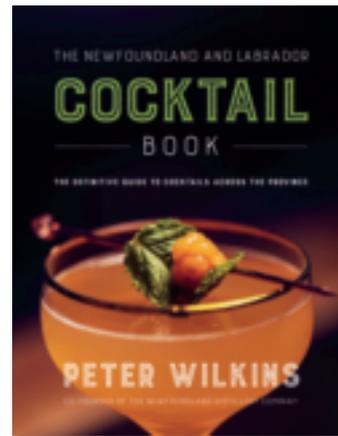
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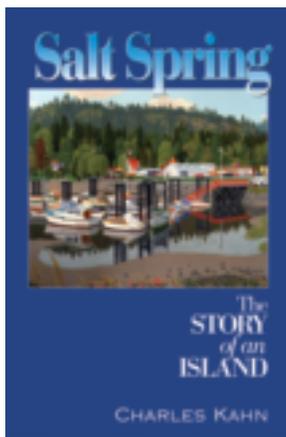
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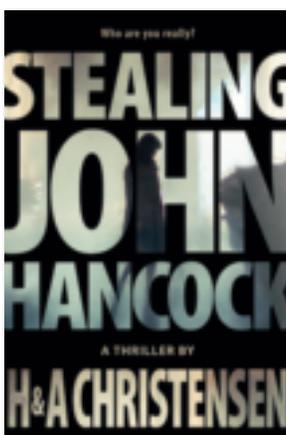
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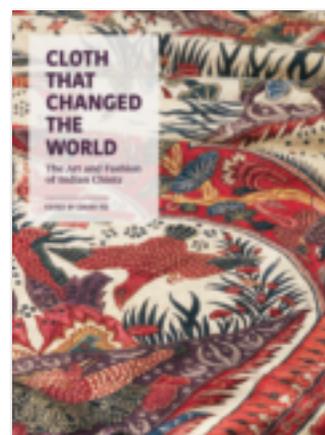
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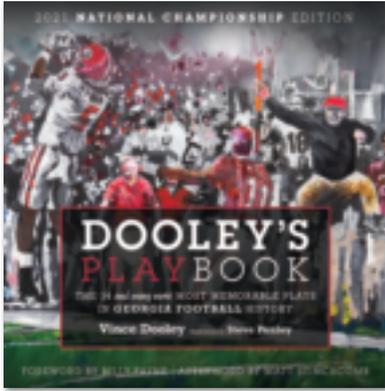
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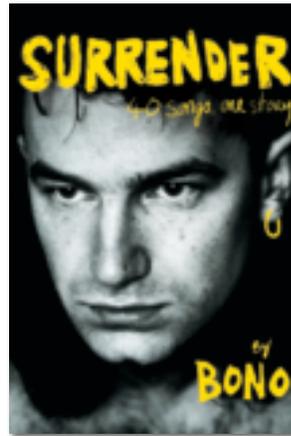
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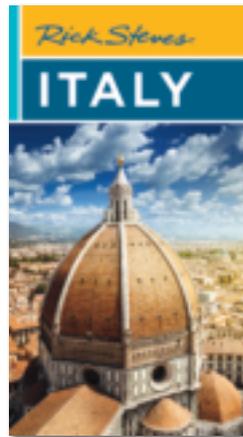
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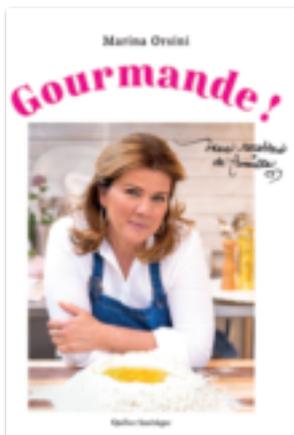
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Publisher:
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Trim Size:
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Publisher:
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Trim Size:
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248



Publisher:
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Trim Size:
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324



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