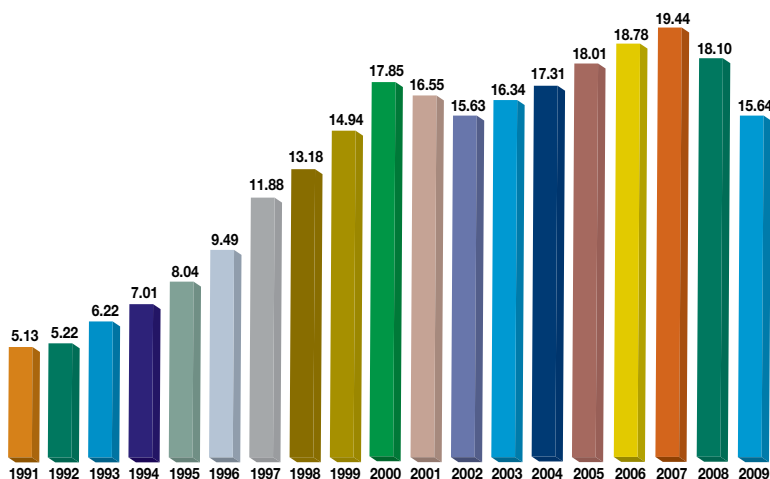


PPAI The 2009 Estimate Of Promotional Products Distributor Sales

The 2009 sales volume figures reflect a decrease of 13.61 percent in distributor revenues over 2008. This decrease puts the promotional product industry's revenues at \$15,638,571,468 down from \$18,101,298,808 in 2008. 2009 saw decreases in revenue for both large and small distributor companies. Larger companies with sales of \$2.5 million or more experienced a smaller decrease of 2.35% over 2008 while smaller companies saw a huge decrease of 22.62%. This year also showed very noticeable changes in the number of companies in the industry that report promotional product sales. Smaller companies with sales less than \$2.5 million decreased from 21,500 last year to 21,150 this year. In contrast, larger companies with sales of \$2.5 million or more increased from 830 to 857 in number in 2009. This increase in a count of larger companies is partly due to reporting by companies who were previously primarily in the printing, forms, packaging, health supply industries (i.e. dental, eye care, medical and veterinary supply) that now report significant sales in promotional products. The total number of distributor companies counted this year were 22,007 as opposed to 22,330 last year.

INDUSTRY SALES VOLUME IN BILLIONS



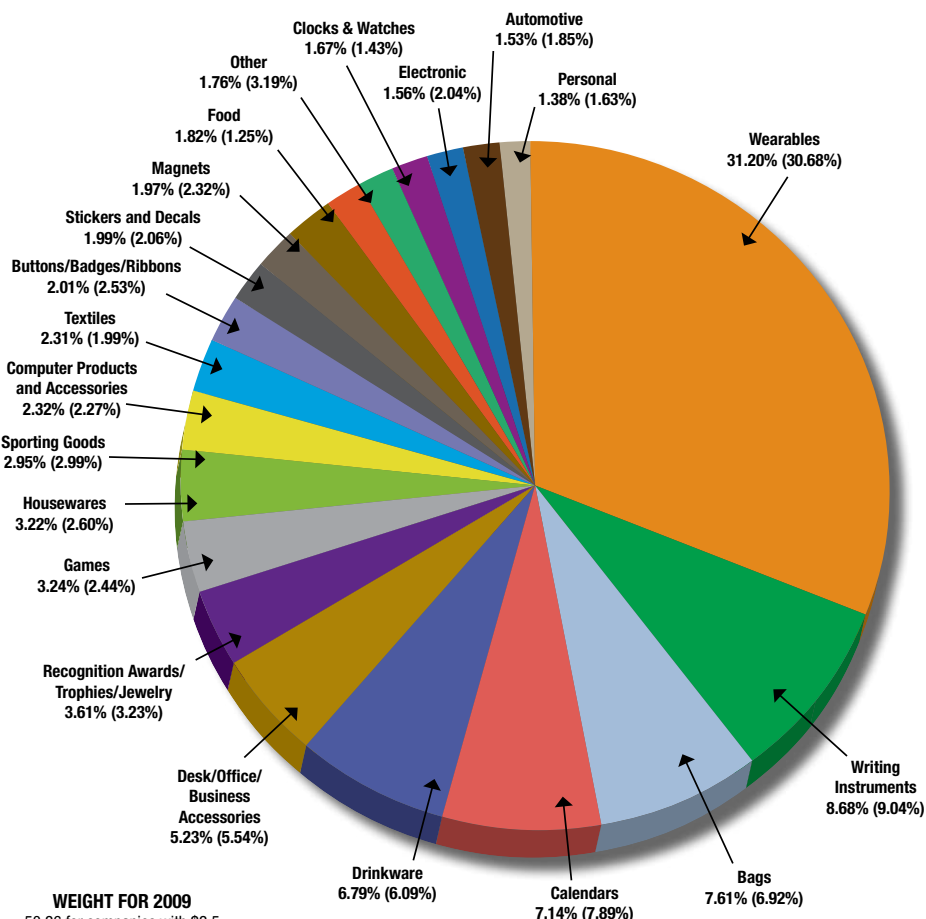
DISTRIBUTOR SALES VOLUME

Distributor Company Size	Number Of Distributor Companies	2009 Sales Volume	% Increase/Decrease In Sales Volume Over 2008
Less than \$2.5 million	21,150	\$7,778,492,878	-22.62%
\$2.5 million or more	857	\$7,860,078,590	-2.35%
INDUSTRY TOTAL	22,007	\$15,638,571,468	-13.61%

How the estimate of distributor sales is obtained: Approximately 15,500 promotional products distributors companies are surveyed by researchers at Louisiana State University and Glenrich Business Studies. A point estimate (mean) is derived and multiplied by the number of small distributor companies (21,150). To prevent distortion, a census of the larger distributor companies is conducted and the sum of their sales is added to the sales volume of the smaller distributor companies to arrive at the sales estimate for the entire industry.

This annual estimate of distributor sales is sponsored by Promotional Products Association International and conducted by researchers at Louisiana State University and Glenrich Business Studies.

2009 SALES BY PRODUCT CATEGORY (2008 FIGURES IN PARENTHESES)



WEIGHT FOR 2009

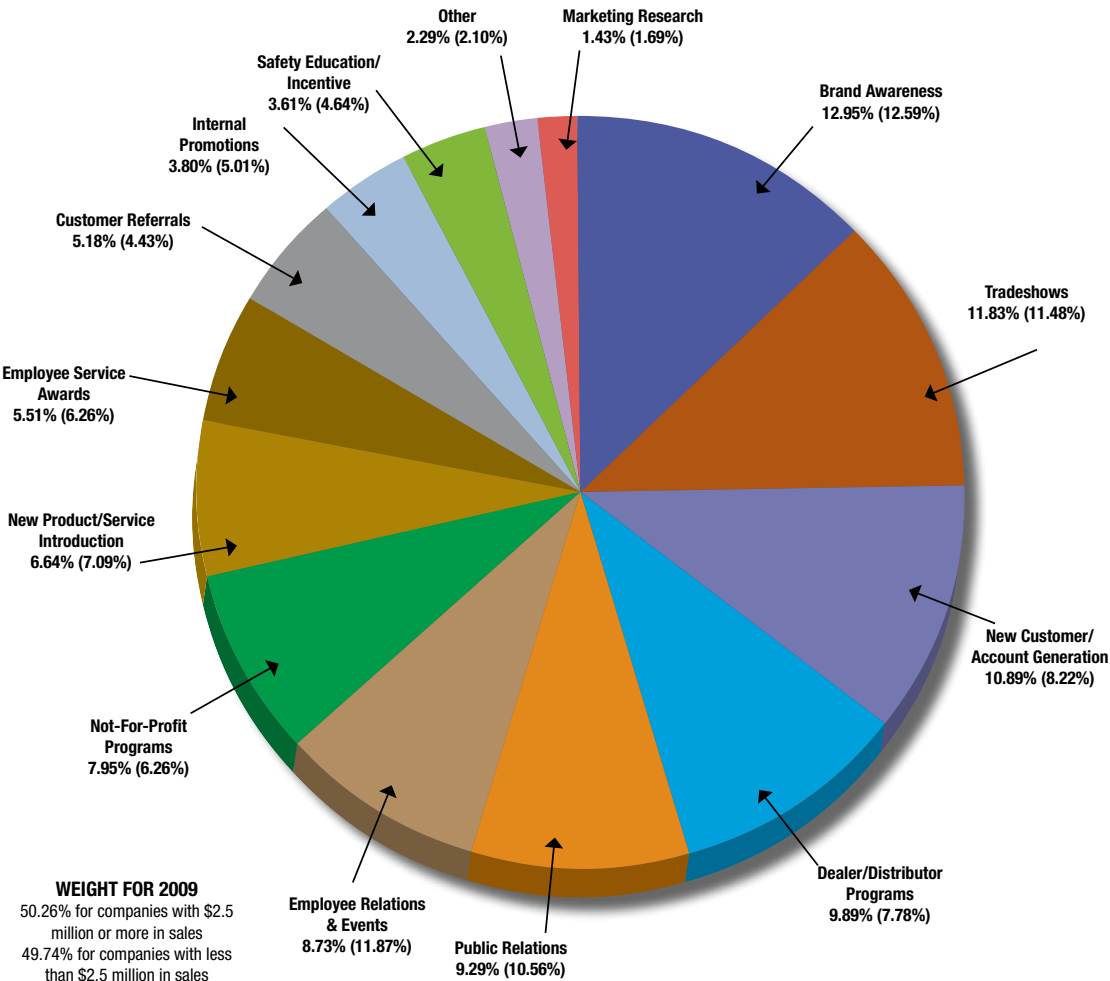
50.26 for companies with \$2.5 million or more in sales
49.74% for companies with less than \$2.5 million in sales

Note: Percentages may not add up to 100% due to rounding error.

PRODUCT CATEGORY (Includes the following:)

- Wearables:** T-shirts, golf-shirts, aprons, uniforms, blazers, caps, hats, headbands, jackets, neckwear, footwear, etc.
- Writing Instruments:** Pens, pencils, markers, highlighters, etc.
- Bags:** Tote bags, shopping bags, satchels, gift bags, drawstring bags, cosmetic bags, paper bags, duffel bags, briefcases, etc.
- Calendars:** Wall and wallet calendars, desk diaries, pocket secretaries, etc.
- Drinkware:** All-glass, china, ceramic, crystal, plastic and stainless steel drinkware
- Desk/Office/Business Accessories:** Folders, desk pen sets, calculators, non-dated paper products, cubed paper, scratch pads, adhesive notes, stationery, etc.
- Recognition Awards/Trophies/Jewelry:** Awards, trophies, plaques, certificates, figurines, jewelry, etc.
- Games/Toys/Playing Cards/Inflatables:** Kites, balls, puzzles, stuffed animals, etc.
- Housewares/Tools:** Measuring devices, kitchen products, picture frames, household decorations, ornaments, tool kits, first aid kits, furniture, flashlights, cutlery, weather instruments, etc.
- Sporting Goods/Leisure Products/Travel Accessories:** Picnic/party products, camping equipment, barbecue items, bar products, binoculars, luggage, passport cases, etc.
- Computer Products and Accessories:** Mouse pads, monitor frames, disk carriers, wrist pads, software, etc.
- Textiles:** Flags, towels, umbrellas, pennants, throws, blankets, etc.
- Buttons/Badges/Ribbons:** Buttons, badges, ribbons, signs, banners, etc.
- Stickers and Decals:** Stickers, decals, etc.
- Magnets:** Magnets and magnetic products
- Food Gifts:** Candy, nuts, gourmet, meat, spices, etc.
- Other:** No examples reported
- Clocks and Watches:** Clocks, watches, etc.
- Electronic Devices & Accessories:** Radios, TVs, videotapes, music CDs, phone cards, etc.
- Automotive Accessories:** Key tags, bumper strips, road maps, floor mats, window shades, etc.
- Personal/Pocket-Purse Products:** Pocket knives, grooming aids, lighters, matches, sunglasses, wallets, etc.

2009 SALES BY PROGRAM CATEGORY (2008 FIGURES IN PARENTHESES)



PROGRAM TYPE (Includes the following:)

Brand Awareness: Promotion of brand awareness and brand loyalty

Tradeshows: Tradeshow traffic generation

New Customer/Account Generation: New customer or new account generation

Dealer/Distributor Programs: Dealer incentives, co-op programs, company stores

Public Relations: Corporate involvement with community, fundraising, sponsorship, school programs, media relations, corporate image

Employee Relations & Events: Morale and motivation, corporate/employee events, employee orientation, organizational commitment/corporate identity, corporate communication, employee training (other than safety), employee referral programs

Not-For-Profit Programs: Not-for-profit use for fundraising, public awareness campaigns (health, environment, public safety, etc.)

New Product/Service Introduction: New product or service introduction

Employee Service Awards: Anniversary recognition, service awards, etc.

Customer Referrals: Customer referral incentive programs

Internal Promotions (Incentive; Non-Safety): Sales incentive, TQM/quality programs, productivity, inventory reduction, error reduction, attendance improvement

Safety Education/Incentive: Employee safety and education

Other: No examples reported

Marketing Research: Marketing research, survey and focus group participation programs

WEIGHT FOR 2009

50.26% for companies with \$2.5 million or more in sales
49.74% for companies with less than \$2.5 million in sales

Note: Percentages may not add up to 100% due to rounding error.

ONLINE SALES OF PROMOTIONAL PRODUCTS – A LOOK BACK

* ONLINE SALES ARE DEFINED AS SALES RESULTING FROM ORDERS PLACED THROUGH AN ONLINE STORE OR WEBSITE.

	2007	2008	2009
Total online sales of promotional products for companies with less than \$2,500,000 in sales	\$1,332,303,963	\$1,500,877,922	\$1,253,115,203
Total online sales of promotional products for companies with sales of \$2,500,000 or more	\$1,604,607,453	\$1,377,168,383	\$1,192,374,689
TOTAL	\$2,936,911,416	\$2,878,046,305	\$2,445,489,892

SEGMENTING INDUSTRY SALES BY SIZE OF COMPANY

Size Of Company	2006	2007	2008	2009
Less than \$250,000	\$1,545,182,780	\$1,334,940,007	\$1,614,791,538	\$1,449,394,342
\$250,001-\$500,000	\$1,708,237,771	\$1,679,156,396	\$1,424,289,012	\$1,141,927,375
\$500,001-\$1,000,000	\$2,309,470,772	\$2,359,786,050	\$2,480,709,538	\$1,657,285,743
\$1,000,001-\$2,500,000	\$4,071,887,677	\$4,726,981,561	\$4,532,599,412	\$3,529,885,418
\$2,500,001 or more	\$9,144,875,661	\$9,339,973,533	\$8,048,909,308	\$7,860,078,590
TOTAL	\$18,779,654,661	\$19,440,837,547	\$18,101,298,808	\$15,638,571,468