

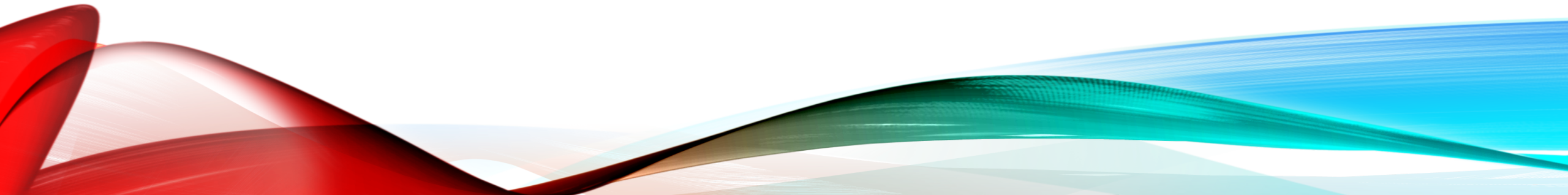


# WhatTheyTh!nk

## Technology Outlook Week: Digital Printing

Ralf Schlözer, [digitalprintexpert.de](http://digitalprintexpert.de)

May 17, 2021



# Get the most out of this webinar...

- SEND US YOUR QUESTIONS DURING THE WEBINAR
  - Q&A box is at the bottom of your screen
    - Please use Q&A box rather than Chat
  - There is a Q&A at the end
- Downloadable archive—slides and audio—will be available by the end of the day

**Canon**

CANON SOLUTIONS AMERICA

**YOU CAN**

**EXCEL WITH CANON—  
THE INKJET MARKET  
SHARE LEADER IN  
THE U.S.**



# Our Presenters



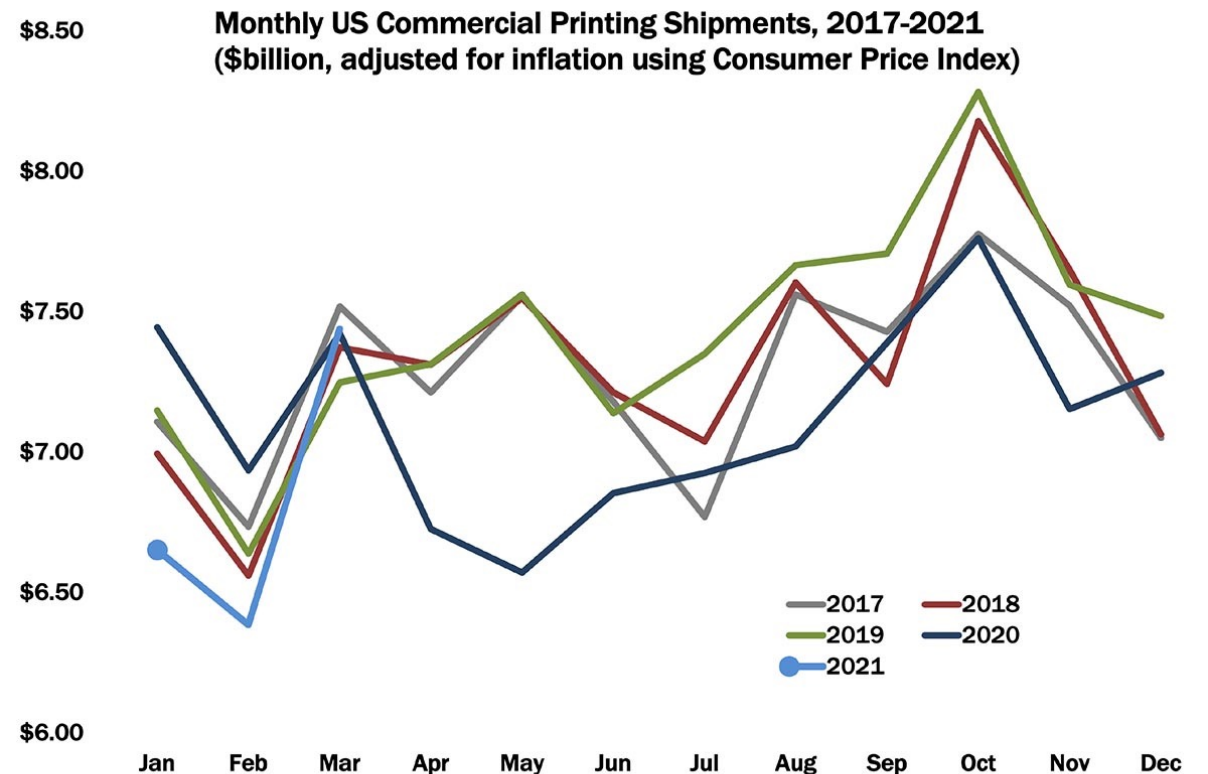
**Ralf Schlözer**

# Topics

- The impact of COVID-19 pandemic on global print volumes
- The rationale of digital print in pandemic times
- The impact of COVID-19 pandemic on 2020 digital press sales and paths to recovery
- Key digital press launches in the last 15 month
- Digital print technology expectations for 2021 and 2022

# Print Market after Covid-19

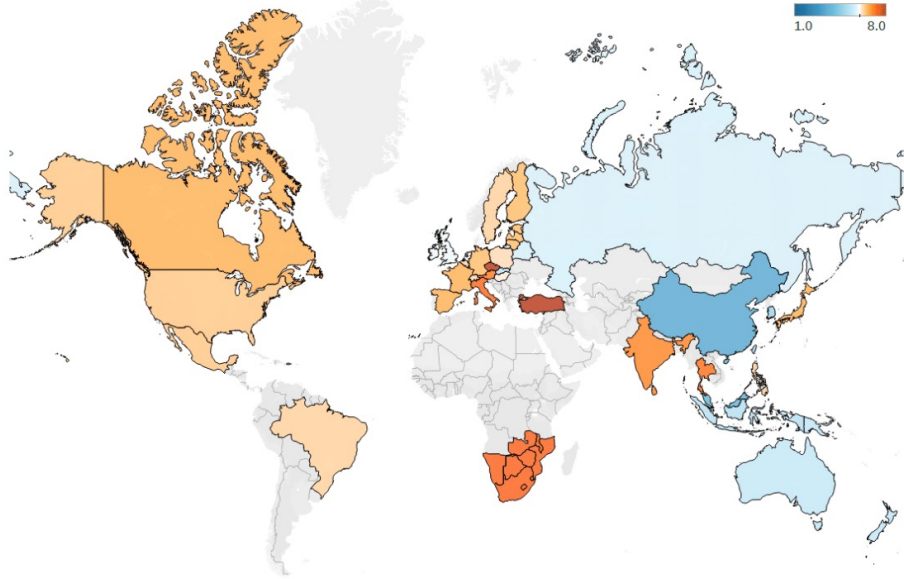
- Fast decline, but equally fast recovery after the first peak of pandemic
- Print production has not fully recovered since
  - US production value about \$ $\frac{1}{2}$  bn lower each month since April 2020
  - March 2021 finally caught up
- Europe print production volume still about 10% lower



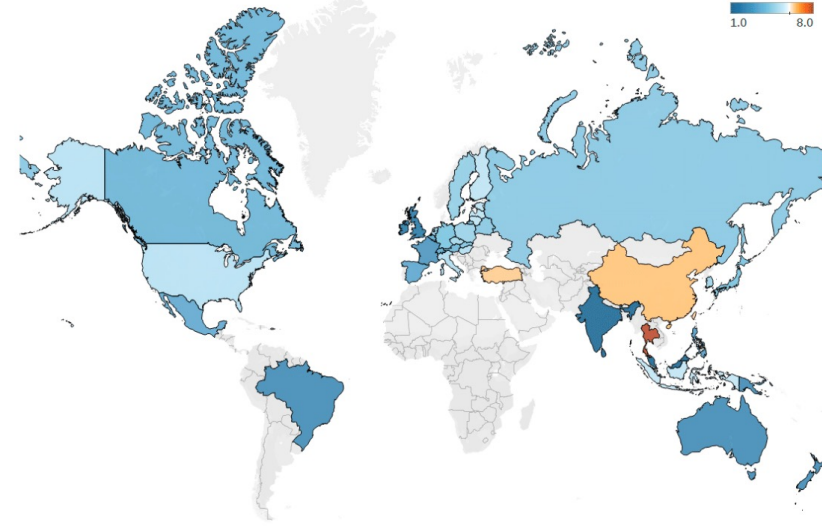


# Offset Print Volumes

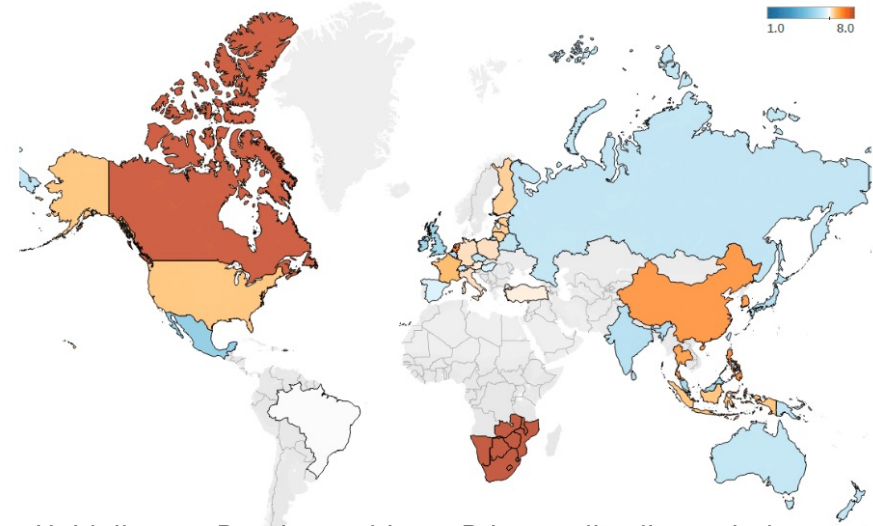
Print Media Climate Index: January 2020



Print Media Climate Index: April 2020




Print Media Climate Index: December 2020



- Heidelberg print volume tracking
  - Volumes compared to 12 months before
  - Red = higher / blue = lower
- Anonymized press volume data from connected sheetfed presses
  - Bias towards modern presses

Source: Heidelberger Druckmaschinen, Print media climate index

# The rationale of digital print in pandemic times

- Ongoing trends in print
    - Shorter runs
    - Just-in-time production
    - E-enablement of processes
    - Shifts in applications
  - Accelerated by the pandemic
- 
- Flexibility and supply chain security became virtues by themselves
  - Digital print is best positioned to serve the changing demand



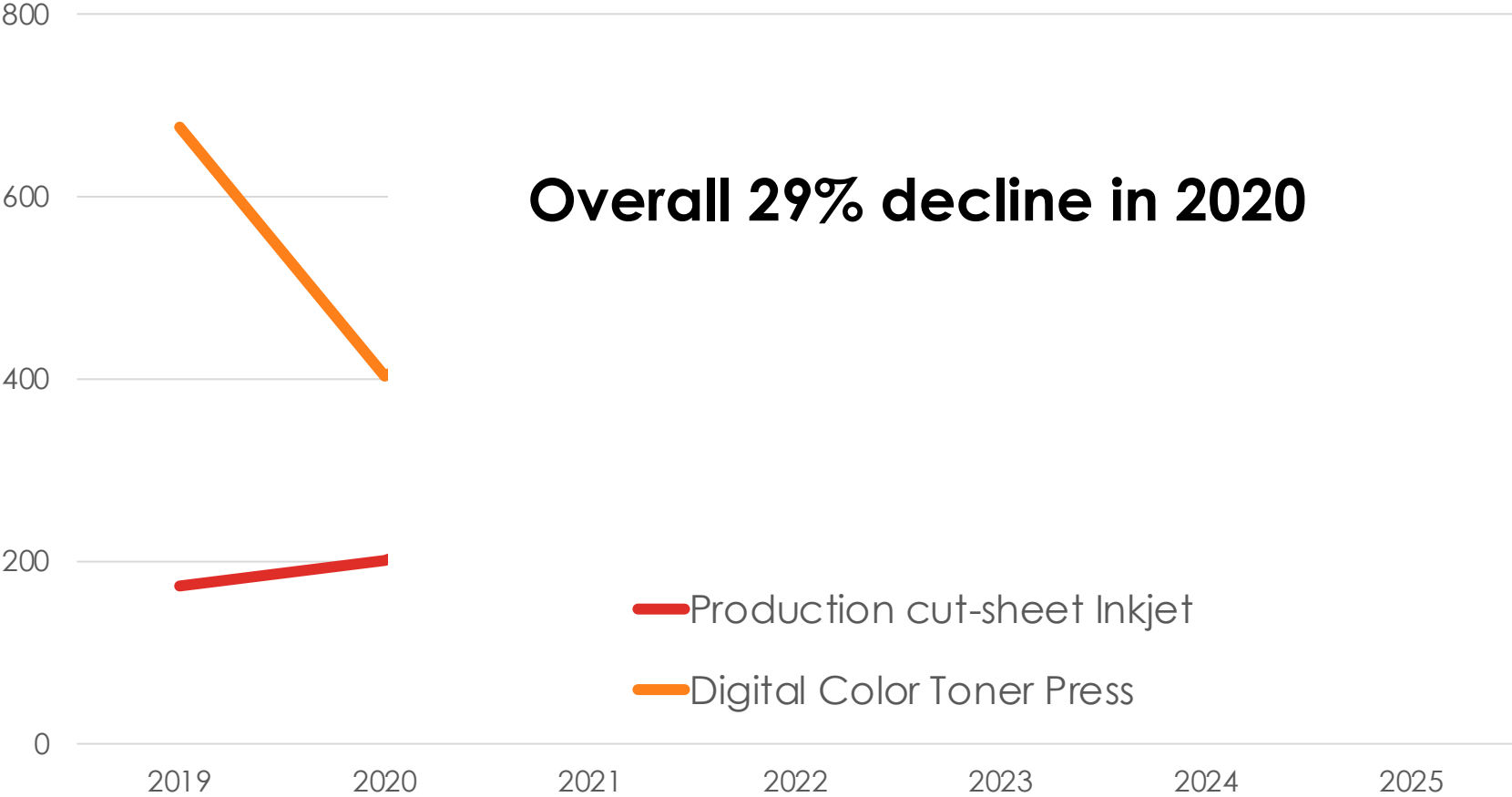
# Digital Print Market in 2020

- About **30% decline** in heavy duty production presses (CF and CS)
- Reduced print volumes across a number of applications
- Insecurity
- Investments postponed
- Difficulties in installing machines
- Drupa effect



# Digital Press Sales

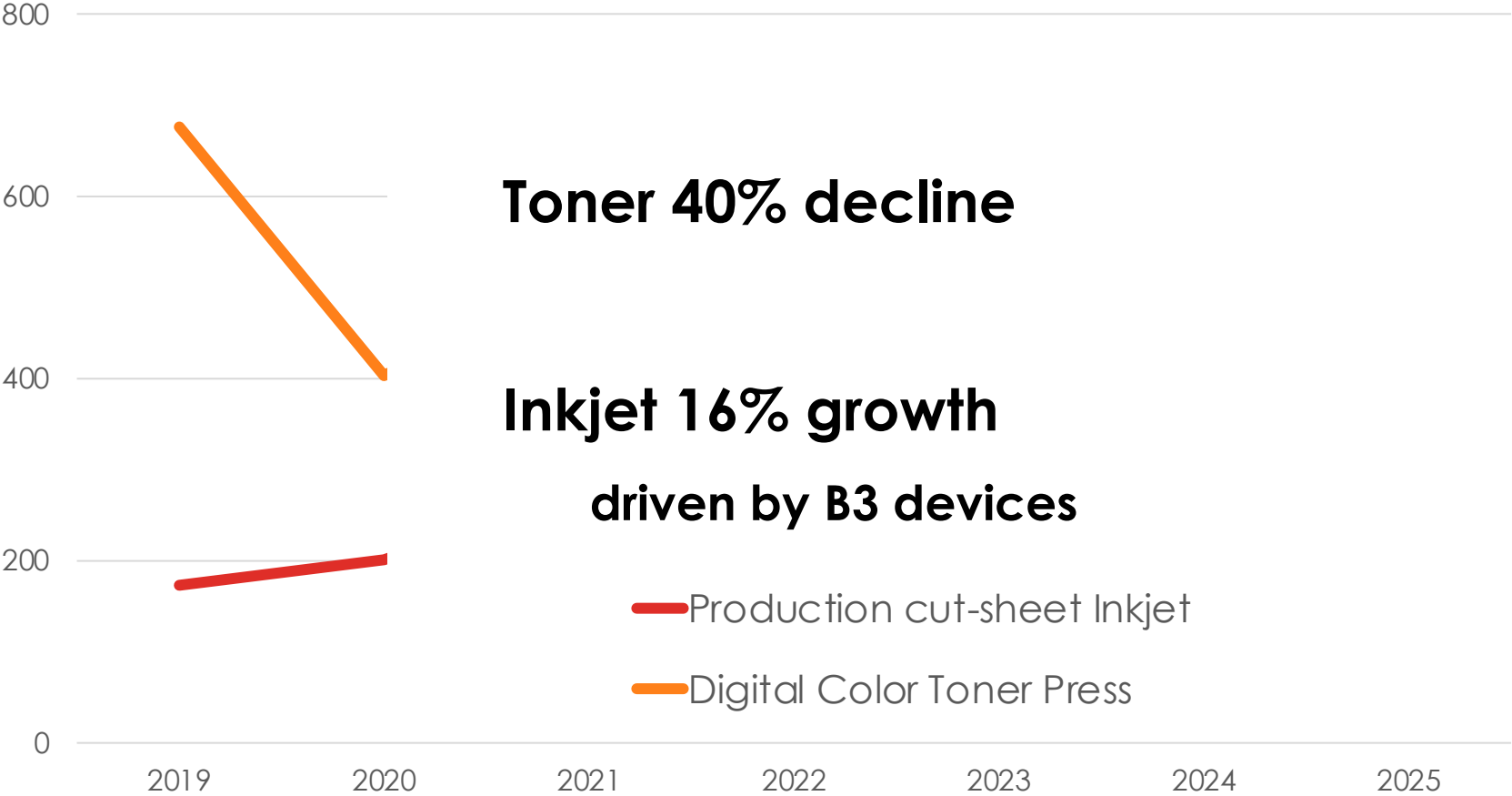
Cut Sheet Production Digital Press Sales by Technology  
2019-2025, WW



Source: IT Strategies, Inc. , 2021

# Digital Press Sales

Cut Sheet Production Digital Press Sales by Technology  
2019-2025, WW



**Toner 40% decline**

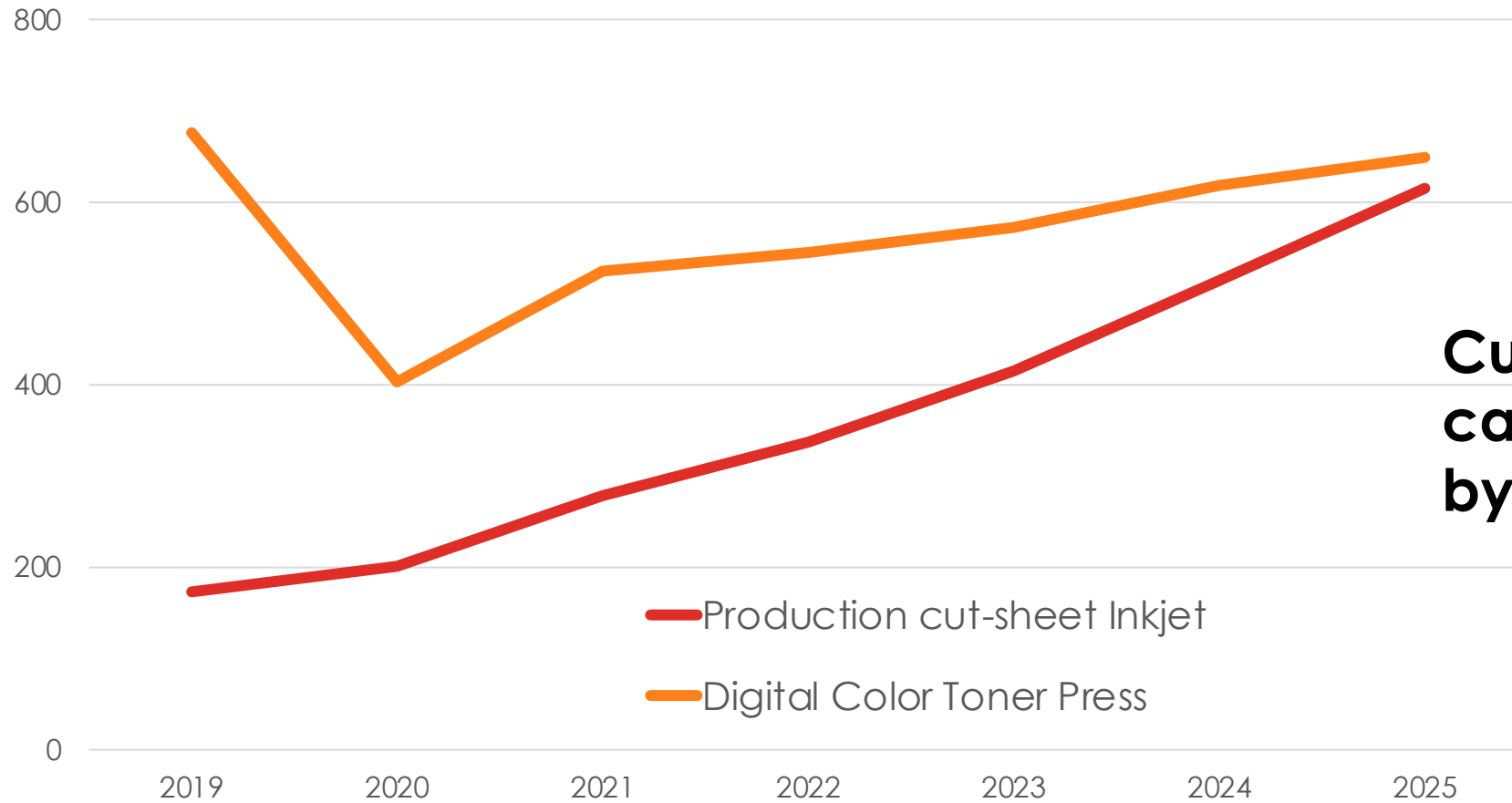
**Inkjet 16% growth  
driven by B3 devices**

- Production cut-sheet Inkjet
- Digital Color Toner Press

Source: IT Strategies, Inc. , 2021

# Digital Press Sales

Cut Sheet Production Digital Press Sales by Technology  
2019-2025, WW

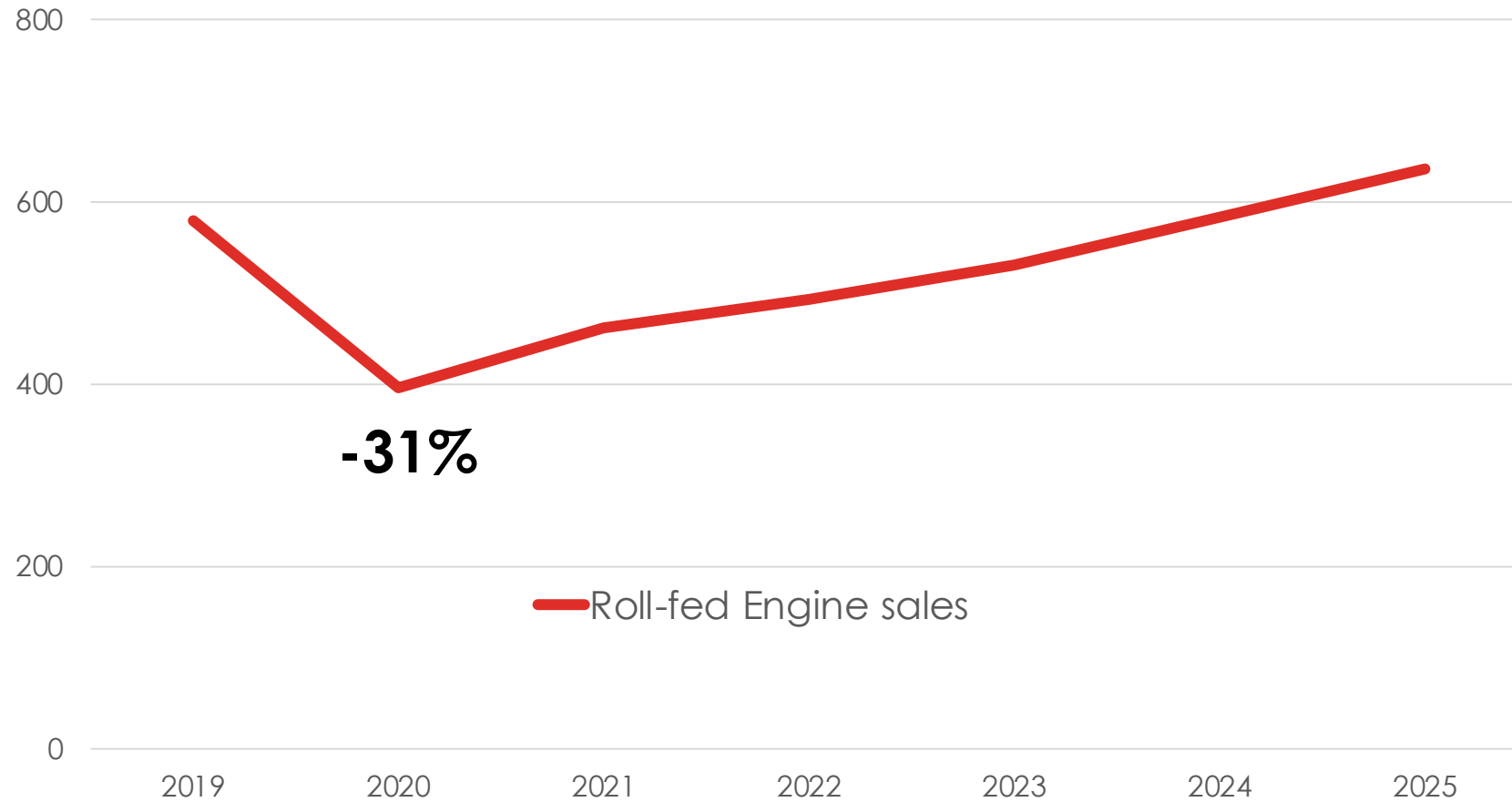


**Cut-sheet inkjet to catch up with toner by 2025**

Source: IT Strategies, Inc. , 2021

# Digital Press Sales

Roll-fed Digital Press Sales by Technology 2019-2025, WW



Source: IT Strategies, Inc. , 2021



# Roll-fed Digital Print Market

- Now almost all is inkjet
- More plannable demand due to renewal cycles
- Commercial is growing, but slowly
- 31% placements decline in 2020 over 2019
- 10% average annual placement growth forecasted
- Despite flat placements still growth in installed base





Introducing  
**HP PageWide Web Press T250 HD with HP Brilliant Ink**  
the standard for high-volume production inkjet web presses

# Digital Press Launches

- 2020 was good - but not stellar year - for product launches
  - Effect of a drupa year (even as postponed event)
  - Some key launches moved into 2021
- Focus on inkjet, but some interesting toner devices as well
- No concept or technology showcases as would have expected at a drupa

Label & packaging launches will be discussed tomorrow



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# Sheetfed Inkjet: Ricoh Pro Z75

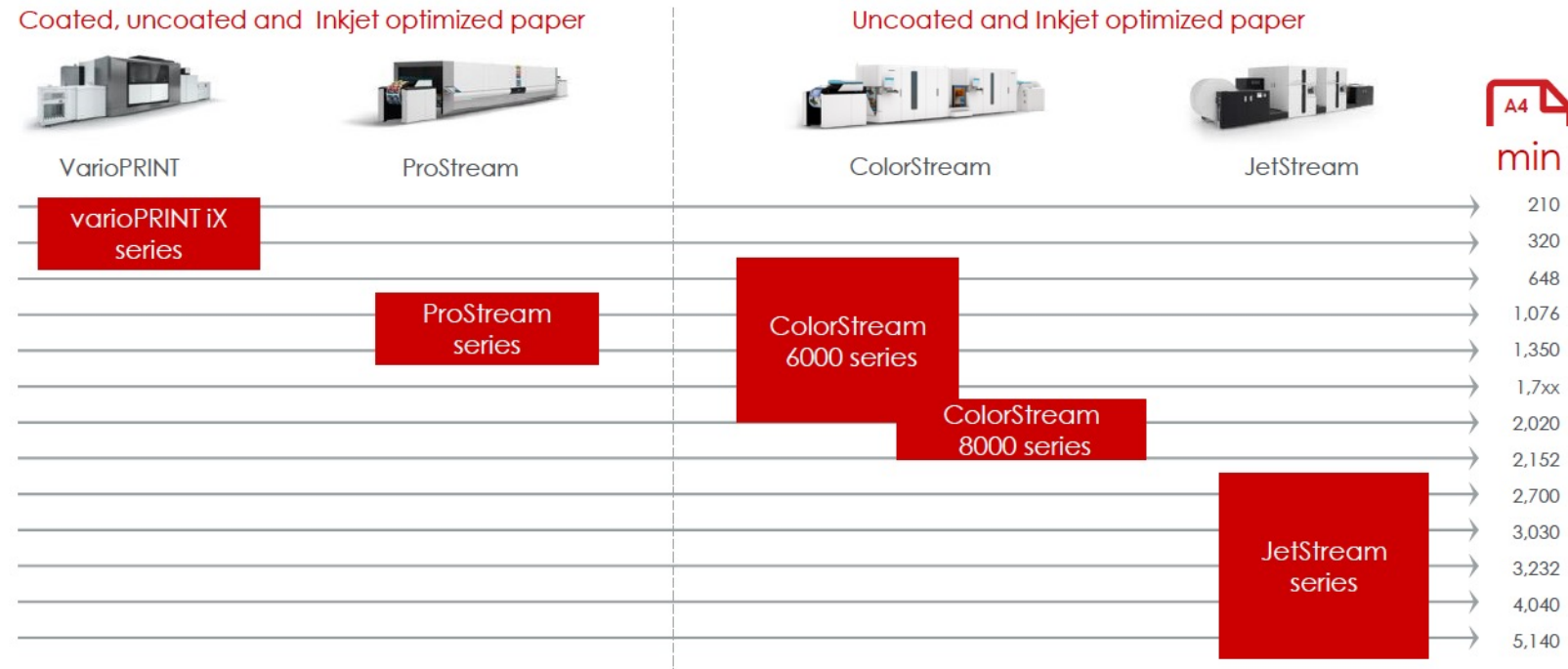
- First cut-sheet inkjet press from Ricoh
- B2 format
- 4,500 sheets/hour
- Ricoh's own 1,200 dpi heads & ink
- Aimed at offset quality
- Multi-tray, in-line finish, multiple output?
  - Could offer a lot of automation and process streamlining
- From 2022





# Rollfed Inkjet: Canon Ups Stakes

- **ProStream 1800**
  - Launched 1 year ago
  - 66% faster
- **ColorStream 8000**
  - ColorStream redesign
  - 1,200 dpi resolution
  - Wider paper range
  - Not just filling a speed gap





# Sheetfed Inkjet – More news

- BlueCrest EvoluJet
  - Based on Kyocera TaskALFA Pro 15000C
- Fujifilm upgrades speed of **JetPress (Jpress) 750S**
  - 5,400 B2/hour = 50% faster (in performance mode)
  - Available as upgrade
- Konica Minolta **AccurioJet KM-1e**
  - Improvements in quality, substrates, efficiency
- Xerox **Baltoro Color Accelerator**
  - New drier, expanded paper range, inks savings, automation



# Rollfed Inkjet – More news

20

- **HP PageWide Press T250HD**
  - Sold by OEM-Partner BlueCrest as Intellijet 20 HD
  - Launched March 2020
- **Kodak Ultra 520**
  - Based on Kodak UltraStream technology
    - Continuous inkjet technology
  - 600 x 1,800 dpi
  - 150 m/min – 2020 A4/min
  - 42-270 gsm papers, including glossy and standard offset stock (with an optional precoating station)
  - First install this summer

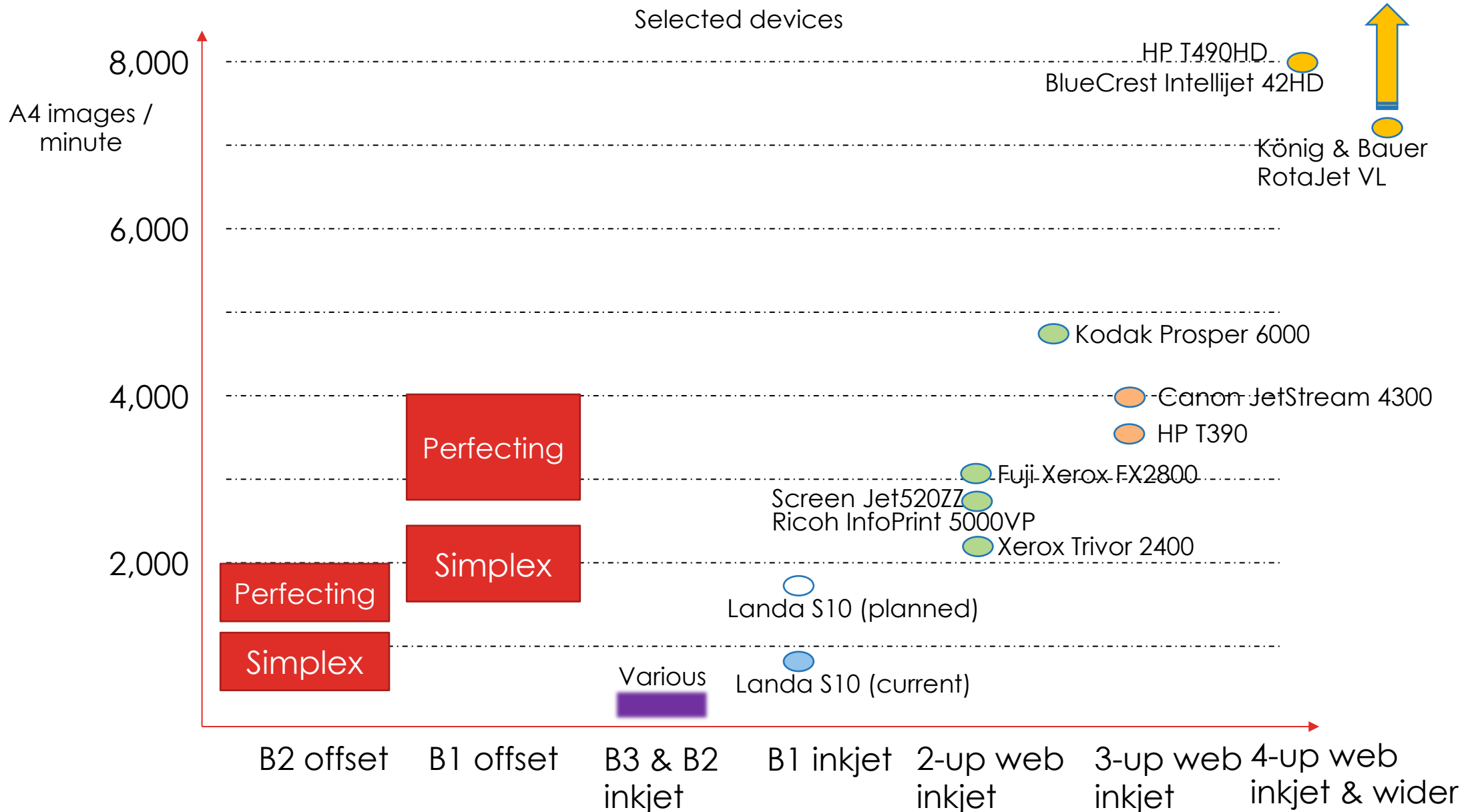


# Toner Presses

- **HP Indigo 100k**
  - Launched March 2020
  - First gen 5 press
  - 4,500 B2 images/hr – 6,000 in EPM mode
- **Xeikon SX30000**
  - Setting a new speed record for dry toner
  - 30 m/min – 404 A4/min (50% faster)
    - 2,545 B2 sheets/hr
  - 1,200 dpi – wide range of papers
- Xerox specialty color kits
  - Fluorescent pink for Iridesse,
  - fluorescent yellow for iGen,
  - adaptive CMYK+ kits for Versant



# Digital print – Speed Comparison



# Digital print technology expectations

- Innovation is continuing, especially in inkjet
- Higher speed in cut-sheet inkjet
  - At different quality levels
- Overlap into packaging
- Specialty colours & effects
- Toner still dominating in light/mid production
- Business model first – technology second



# J Press 750S

**FUJIFILM**  
Value from Innovation

## High Speed Model

- ▶ High Speed Model runs 5,400 impressions per hour (23" x 29.5")
- ▶ Same press runs benchmark High Quality mode at 3,600 impressions per hour
- ▶ Savings over offset, toner and competitive inkjet
- ▶ Productivity – 80% faster than nearest Inkjet competitor
- ▶ Cost in use making the J Press 750S a half-size offset replacement
- ▶ Take more, or all, jobs from offset to digital

The industries fastest Return on Investment

**NEVER  
STOP**  
BELIEVING IN PRINT ■

# Q&A

Send us your  
questions!

# Technology Outlook Week Continues!

- Labels & packaging
  - May 18—Presented by David Zwang
- Software & workflow
  - May 19—Presented by Pat McGrew and Ryan McAbee
- Wide format & signage and textiles & apparel
  - May 20—Presented by Richard Romano and Cary Sherburne
- Finishing
  - May 21—Presented by Trish Witkowski
- For more information and to register visit [whattheythink.com/webinars](http://whattheythink.com/webinars)

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Thanks for joining us!