



# WhatTheyTh!nk

## Technology Outlook: Digital Printing

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May 9, 2022



# Get the most out of this webinar...

- SEND US YOUR QUESTIONS DURING THE WEBINAR
  - Use the Q&A box to ask questions
- Video and audio archive will be available later today along with PDF of slides

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THE INKJET MARKET  
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THE U.S.**



Our  **INKJET  
INSIGHT** presenters  
Evaluate. Optimize. Grow.



Elizabeth Gooding



Mary Schilling



Ralf Schlözer

# Topics

- Trends driving volume and profitability for printers and OEMs
- New press offerings in past 12 months
- Market leading features of the newest press technology.
- The impact of inkjet technology on market segments and print businesses.
- Strategies for differentiating and streamlining your inkjet operation.

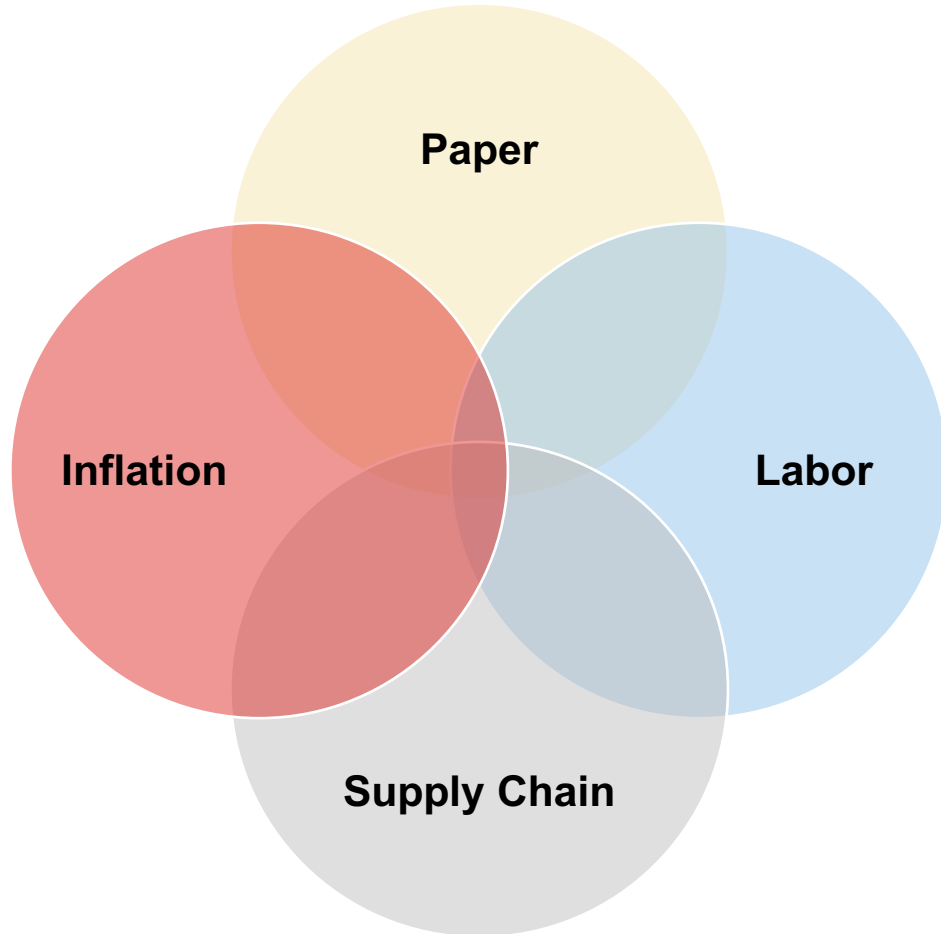


**There's a  
light at  
the end  
of the  
tunnel!**

(and I don't think  
it's an oncoming  
train)

**WhatTheyTh!nk**

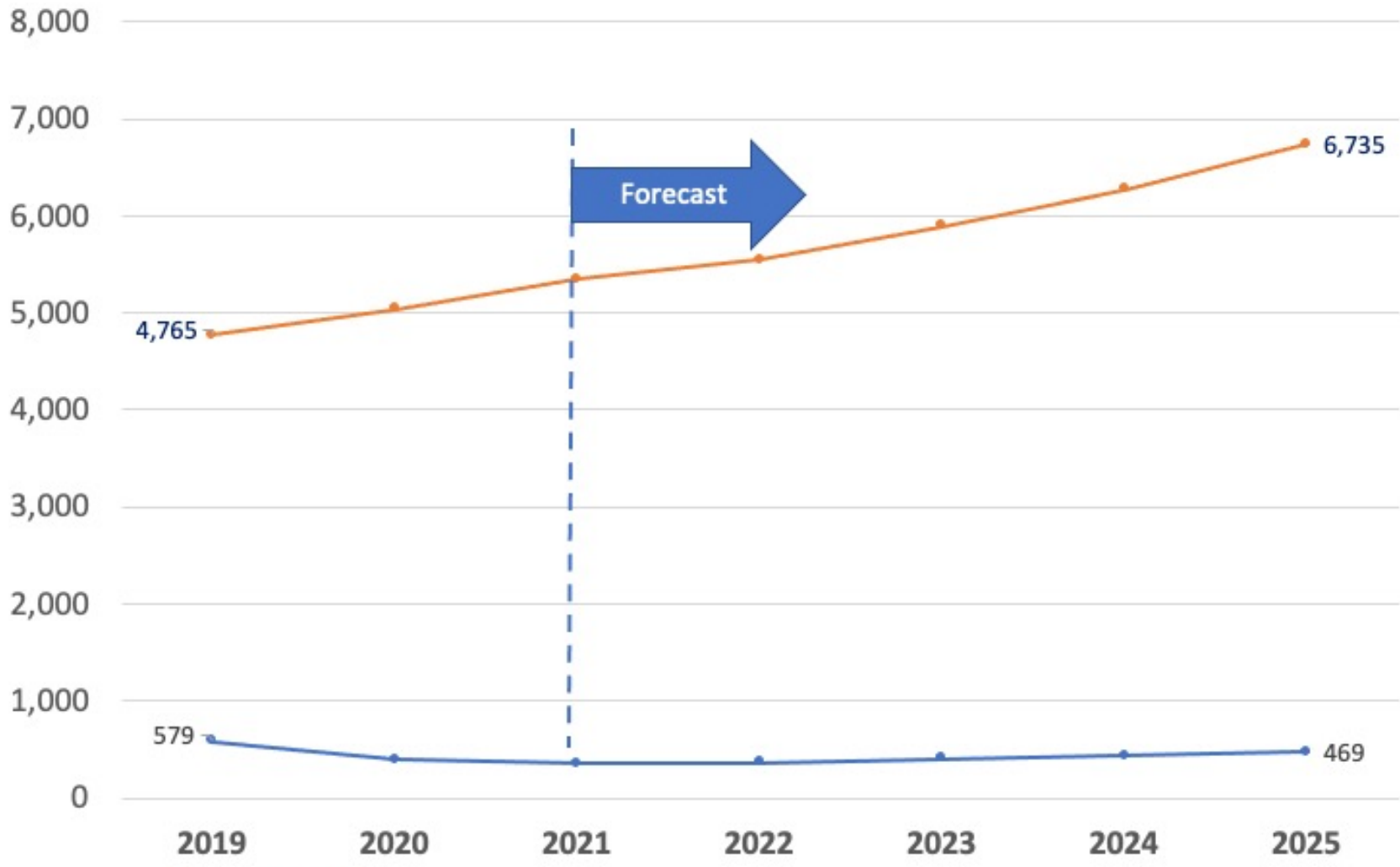
# Many current trends are pain points!



- Paper rationing not letting up
- Need to test papers “on the fly”
- You get what you get
- Post-pandemic - volumes at 100+% but labor availability at 60+%
- Labor challenges not short-term
- Cost of all materials & financing up
- Fear of growth!

### Continuous, Web-Fed Inkjet Engine Sales and Installed Base WW 2019-2025

— Engine Unit Sales — Installed Base



Source: IT Strategies

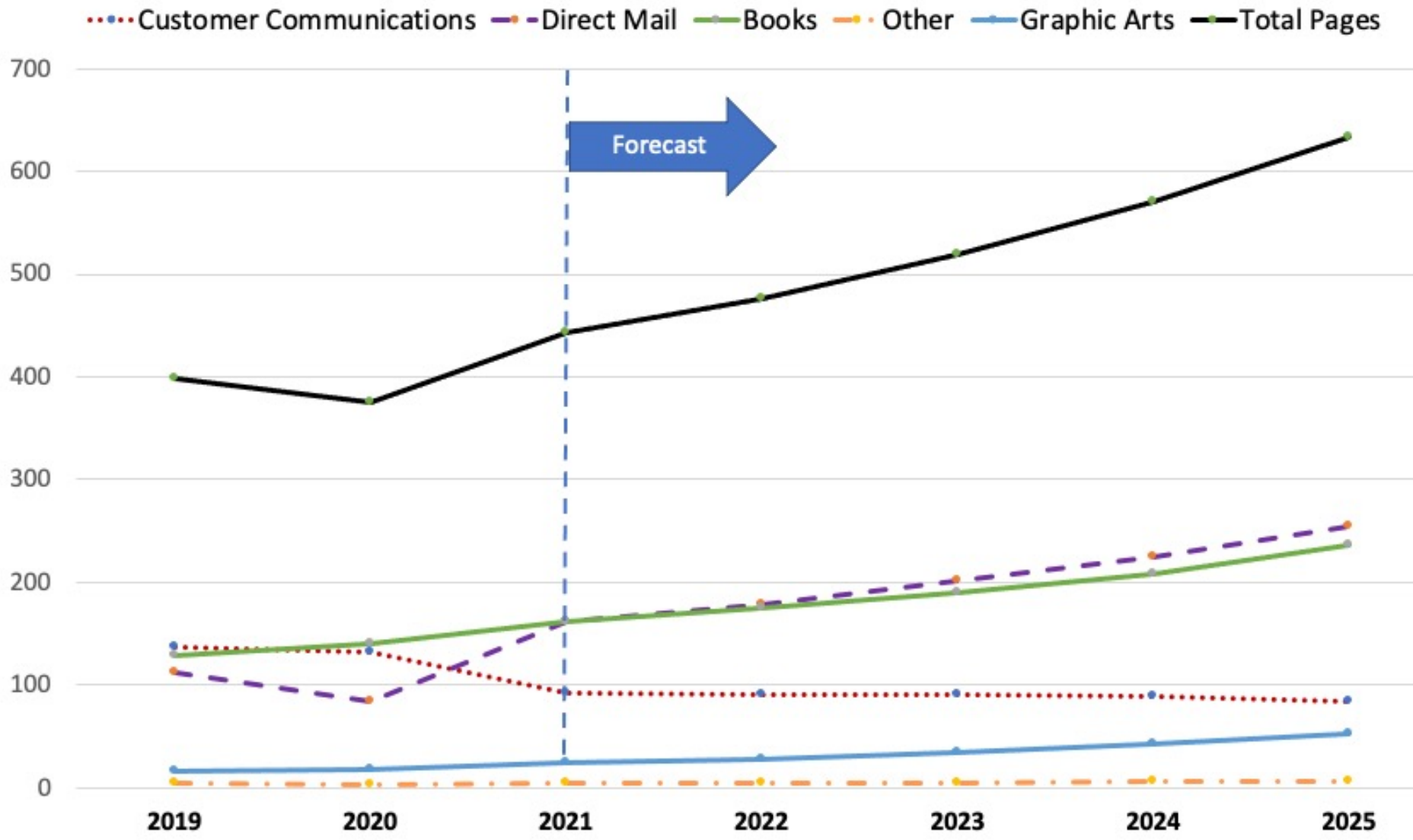
## Trends

Annual (new) CF engine sales down since 2019 - but install base growing.

Higher utilization per press



# Web-fed Inkjet Pages (in Billions) by Application Type WW 2019 -2025



Source: IT Strategies

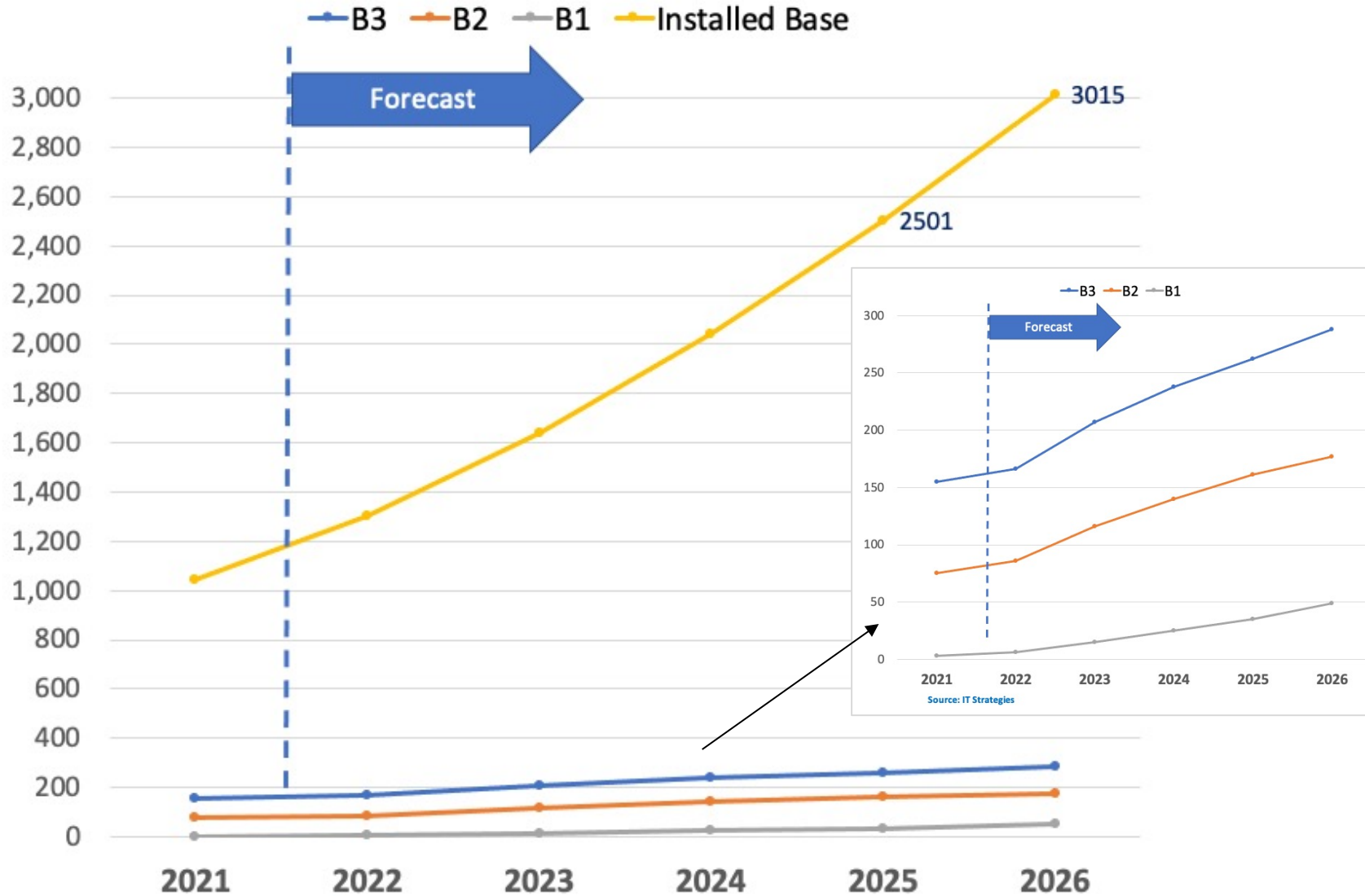
## Trends

All volumes growing except transaction print

### 2025

- Direct mail 40%
- Books 37%
- Transaction 13%
- Graphic Arts 8%

## Cut-Sheet Production Inkjet System Sales 2020-2026, WW



Source: IT Strategies

## Sheet-fed Trends

### Installed base 2025

@ 2500 Sheet-fed presses compared to 6700

### Growth 2021 - 2026

B3 CAGR 24%

B2 CAGR 19%

B1 CAGR 74% (starting from single digits)

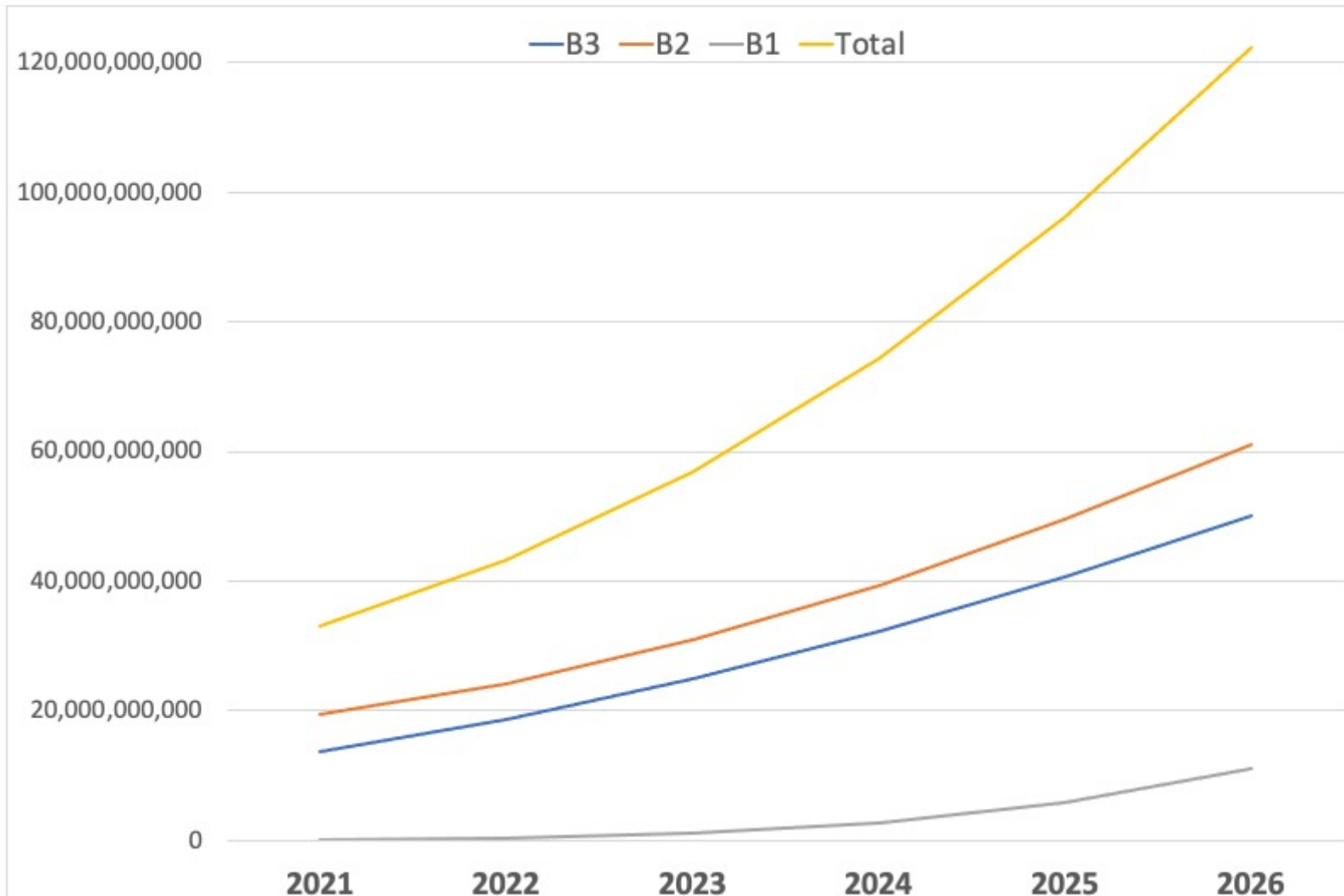
### Share by Format 2026

B3 59%

B2 37%

B1 5%

Cut-Sheet Production Inkjet Page Growth - WW (B3, B2, B1)



Source: IT Strategies

## Sheet-fed Trends

### Different Page Story

More B2 pages on fewer presses

### Growth 2021 - 2026

B3 CAGR 30%

B2 CAGR 26%

B1 CAGR 140% (starting low)

### Segments

**B3** 85% Direct Mail & Commercial,  
10% Book, 5% Transaction

**B2** - Even Graphic/Direct Mail, Books

**B1** - All Graphic/Commercial

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# The upgrade/refurbished inkjet market

HP leads in field upgradable press models

“Forklift” upgrades drive secondary market for presses



- Direct mail presses move to transaction print
- Smaller firms gain access to high-volume equipment
- DR/BC options

# Factors influencing inkjet R&D



- Why so few presses coming to market?
- Where is R&D happening?
- What are customers asking for?

# June 2019 - May 2021

**12 launches**

42% Web-fed

58% Sheet Fed

**Plus 5 upgrades**

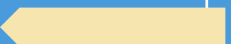
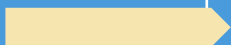
KM Accuriojet 1e

Canon VarioPrint iSeries+

Ricoh Pro VC40000 mono

Fujifilm JPress (JetPress 750S) speed upgrade

Xerox Baltoro - Color Accelerator

|              | Graphic Arts Focused   | Efficiency / Accessibility in Transaction Print and Direct Mail Markets |
|--------------|--|---|
| <b>Web</b>   | HP T250 HD <br>BlueCrest Intellijet HD* <br>Kodak Prosper UltraStream 520 HD<br>Canon ProStream 1800 | Canon ColorStream 8000  |
| <b>Sheet</b> | Landa S10P<br>Xerox Baltoro HD<br>Canon VarioPrint iX 3200 (& 2100)<br>Ricoh Z75   | MCS Merlin K146c*<br>RISO Valezus<br>BlueCrest Evolujet*                |

\*Indicates Marketing agreement

# June 2021 to May 2022

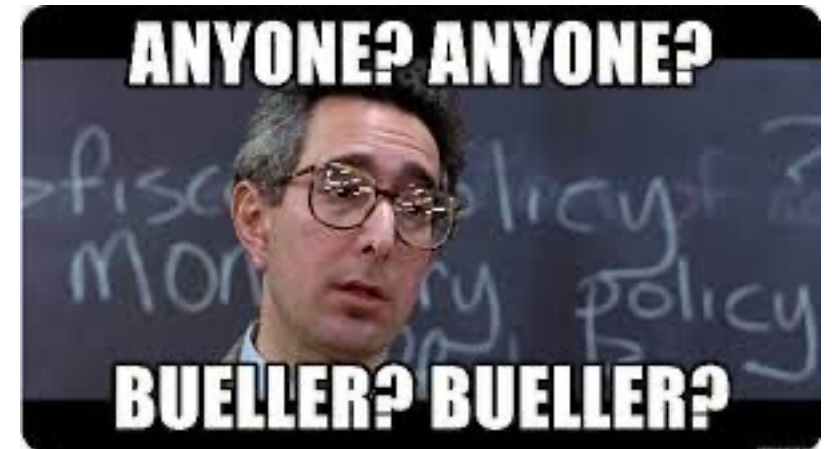
1 new launch

- Super Web WEBJet 2100P

May 2021 launch comes to market

- Canon ColorStream 8000

1 more coming to market next month



# What's New in 2022 – Super Web WEBJet 2100P



- 3 Modes - 1,600 x 1,260 dpi 300 fpm. 1,600 x 925 dpi 410fpm. 1,600 x 790 dpi 490 fpm
- Aqueous Pigment
- 2.1pl fixed drop / 5X Nozzle Redundancy
- 60 – 160gsm
- 4 Print Stations
- 9 - 20.5” Width Paper



# What's New in 2022 - Canon ColorStream 8000



- 2 Speeds @ 1200dpi  
436-525fpm
- Aqueous Pigment
- Variable Drop 2-5pl
- 40 - 160gsm
- Up to 6 Print Stations
- 6.5 - 22" Width Paper

# Kodak

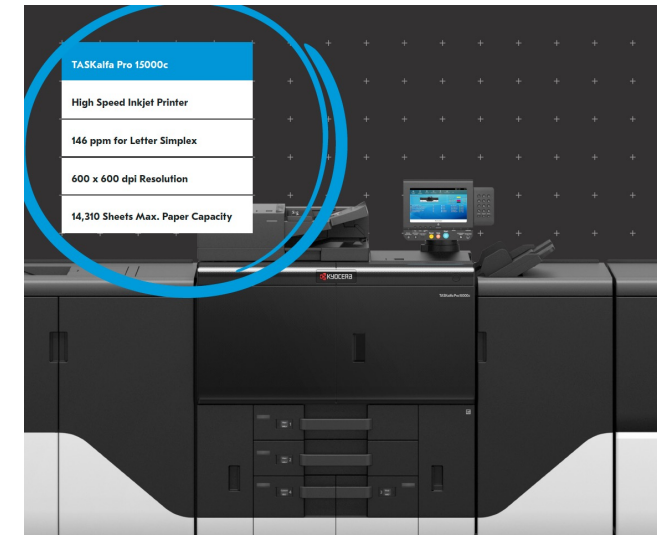
## June 2022 - Customer Event

### Prosper Ultra 520 HD

- C version - high coverage
- P version - publishing
- Kodak UltraStream CIJ heads
- 600 x 1800 dpi
- Kodak nano-particulate pigment inks
- NIR drying
- Coated/Uncoated - 45 to 270 gsm
- Offline or inline priming options

## Kyocera TaskAlfa Pro 15000C

- Big push in 2022
- Added Ricoh to resellers
- New dealer network
- New US Sales offices





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

# Where is the development focus?

- Inline quality control
- Simplified operator environments (labor savings)
  - Auto Splicing
- Streamlined maintenance
- Drying
- Finishing and embellishments
- Substrate compatibility



# Substrate compatibility

## Inkjet OEM supplied

- Integrated priming - flood coat
- Integrated priming where needed
- Robust inks - no primer
- Advanced drying

## Optional equipment

- Nearline pretreatment
- Inline pretreatment



# In-line Coating



Harris & Bruno ExcelCoat ZRW Web Coater  
for HP PageWide Web Press T250 HD



VarioPrint iX with Tecna coater

- Almost standard in offset
- For protection and/or appearance
- Relatively cost efficient way to alter/improve/protect paper
- In-line coating is most efficient
- Still slow adoption in inkjet
- Options slowly increasing
- Paper shortages might be a driver

# Supply Growth and Collaboration

Expansion of ink chemistry and supply facilities.



Canon's acquisition of Edale opens up packaging web handling collaboration.



# Top Trends for Each Market

- Transaction print
- Direct mail
- Books
- Graphic Arts/Commercial





# Q&A

Send us your  
questions!

# Upcoming Webinars

- Technology Outlook Continues!
  - Monday, May 9—Digital/Inkjet Printing w/Elizabeth Gooding, Mary Schilling, and Ralf Schlözer
  - Wednesday, May 11—Software & Workflow w/Pat McGrew and Ryan McAbee
  - Friday, May 13—Labels & Packaging w/David Zwang
  - Tuesday, May 17—Wide-Format & Signage and Textiles & Apparel w/Richard Romano and Cary Sherburne
  - Thursday, May 15—Finishing w/Trish Witkowski
- Top 100 Small Printers
  - Wednesday, June 22 w/Richard Romano and this year's winner (TBD)

*All times at 1 pm ET*

- For more information and to register visit [whattheythink.com/webinars](http://whattheythink.com/webinars)

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**Thanks for joining us!**