

WhatTheyThink!

TECHNOLOGY OUTLOOK

The State of Production Inkjet

Kelly Lawrence, WhatTheyThink

September 8, 2025



PACKAGING



COMMERCIAL PRINT

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Today's Panelists

Kelly Lawrence

Kelly Lawrence is a recognized business growth expert and the Founder and CEO of Lawrence Innovation, LLC, a business growth advisory. Kelly's clients learn the process, insights, strategy and tactics to deliver new business results through strategic marketing and innovation. Kelly helps clients win in new markets, develop and launch new technologies, products and services and establish new business models that generate sustainable profitability. Kelly has served the print industry for over 20 years – first as a print specifier with Fortune Brands' Moen, and later as a print innovator with Berkshire Hathaway's Lubrizol. Lawrence has served the print industry as an Associate Consultant with Smithers and contributing author to Inkjet Insight. Lawrence currently serves as a contributing author to WhatTheyThink, frequently discussing business issues and opportunities that affect the print industry.

Today's Topics—Including But Not Limited To...

- Production Print Outlook 2025
- Technology, Trends, and Vertical Market Shifts
- Kelly Lawrence, WhatTheyThink Contributor
- Sponsored by Canon, eProductivity Software, and Ricoh

WHAT YOU'LL LEARN

1. Market-leading features of the newest press technology
2. The impact of inkjet on market segments and print businesses
3. Trends driving volume and profitability
4. Strategies to streamline and differentiate your operation



INKJET IN 2025: FROM DISRUPTION TO CORE



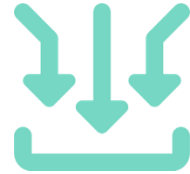
- ▶ Inkjet now a core production technology
- ▶ Multi-sector platform: commercial, packaging, textiles, signage, décor
- ▶ Driver of growth and innovation across the value chain

DEFINING PRODUCTION INKJET TODAY



- ▶ High-speed, industrial-scale printing
- ▶ Fixed printhead arrays, single-pass throughput
- ▶ Comparable to offset in quality
- ▶ Wide substrate compatibility
- ▶ Built for automation and on-demand runs

OVERARCHING MARKET FORCES



- ▶ Sustainability & Regulation
- ▶ Automation & AI Integration
- ▶ Market Diversification
- ▶ Localized Production & Supply Chain Resilience

SUSTAINABILITY & REGULATION



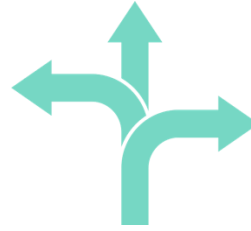
- ▶ Brand mandates embedded in contracts
- ▶ Regulations converging with corporate goals
- ▶ Drives ink chemistry and substrate innovation
- ▶ Must still deliver ROI

AUTOMATION & AI INTEGRATION



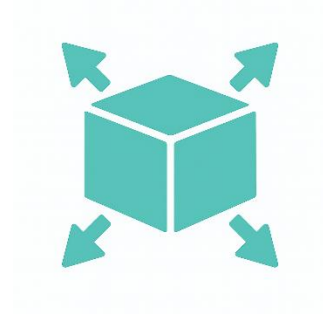
- ▶ Predictive maintenance and real-time defect detection
- ▶ AI-driven DFEs and closed-loop color control
- ▶ Cloud and API-based modular workflows
- ▶ Frees operators for higher-value tasks

MARKET DIVERSIFICATION



- ▶ PSPs expanding into adjacent markets
- ▶ Packaging → signage, commercial → packaging, textiles → décor
- ▶ Reduces risk, spreads investment, captures growth
- ▶ Technology convergence enabling crossover

LOCALIZED PRODUCTION & SUPPLY CHAIN RESILIENCE



- ▶ Nearshoring and microfactories gaining traction
- ▶ Driven by supply chain volatility and fast fashion timelines
- ▶ Supports shorter runs, faster turnaround, reduced inventory
- ▶ Strongest pull in textiles, packaging, and specialty print



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- Voice-activated print job quoting
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- AI-powered press configuration
- Conversational AI-assisted order & billing intelligence



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INKJET SEGMENTS TO WATCH



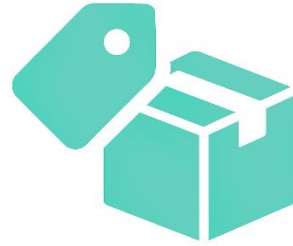
- ▶ Production Inkjet in Action:
 - ▶ Commercial Print
 - ▶ Labels & Packaging
 - ▶ Sign & Display
 - ▶ Textiles & Apparel
 - ▶ Software & Workflow
 - ▶ Finishing

COMMERCIAL PRINT: STATE OF THE MARKET



- ▶ Largest installed base
- ▶ Direct mail, transactional, books, marketing
- ▶ Trends:
 - ▶ High-speed offset-comparable presses
 - ▶ AI-driven DFEs & automation
 - ▶ Sustainability commitments
 - ▶ ROI from short-run, high-mix work

LABELS & PACKAGING



- ▶ Fastest-growing segment
- ▶ Corrugated, folding carton, labels; expanding into flexible packaging
- ▶ Trends:
 - ▶ Food-safe, recyclable inks
 - ▶ Smart packaging (QR, NFC, AR)
 - ▶ Specialty shapes like cylindrical containers

SIGN & DISPLAY



- ▶ Push for eco-friendly inks and chemistries
- ▶ Growth of fabric-based soft signage
- ▶ Hybrid platforms for rigid and flexible substrates

TEXTILES & APPAREL



- ▶ Driven by sustainability and e-commerce fulfillment
- ▶ Localized microfactory adoption
- ▶ Eco-friendly pigments, water-efficient systems
- ▶ Mass customization and rapid sampling

SOFTWARE & WORKFLOW



- ▶ Sustainability dashboards with emissions/resource tracking
- ▶ End-to-end connectivity via cloud workflows
- ▶ AI for predictive maintenance and automated make-ready

FINISHING



- ▶ Inline embellishment with recyclable foils and coatings
- ▶ Automation to reduce labor touchpoints
- ▶ Premiumization through tactile finishes

CHALLENGES & BARRIERS



- ▶ Substrate pretreatment still limits some applications
- ▶ Ink costs higher vs. analog, but offset by ROI factors
- ▶ Workflow integration complexity
- ▶ Regulatory uncertainty across regions

OPPORTUNITIES & FUTURE DIRECTIONS



- ▶ Functional printing (electronics, smart labels, anti-counterfeiting)
- ▶ Hybrid analog-digital production lines
- ▶ Localized, on-demand packaging and apparel
- ▶ Closed-loop sustainability strategies

SHOW FLOOR EVALUATION CHECKLIST



- ▶ When evaluating inkjet technology, ask:
 - ▶ Speed and substrate range?
 - ▶ Workflow integration readiness?
 - ▶ Sustainability metrics reporting?
 - ▶ Inline finishing and embellishment?
 - ▶ Smart packaging or traceability features?

WRAP UP & RESOURCES



- ▶ Inkjet has moved to the center of production
- ▶ Trends: sustainability, automation, diversification, localization
- ▶ Opportunities in functionality, hybridization, and premiumization
- ▶ Resources: OEM and ink manufacturer announcements, CPG drivers shaping requirements, WhatTheyThink archives

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Q&A

Upcoming WhatTheyThink Webinars

- Technology Outlook Week Continues!
 - Tuesday, September 9—Labels & Packaging w/David Zwang, sponsored by Canon, EFI, and Michelman
 - Wednesday, September 10—Software & Workflow w/Pat McGrew and Ryan McAbee, sponsored by Durst, Fiery, and Infigo
 - Thursday, September 11—Wide-Format & Signage and Textiles & Apparel w/Richard Romano and Cary Sherburne, sponsored by EFI
 - Friday, September 12—Finishing & Embelishments w/Patrick Henry, sponsored by Tecnav

For more information and to register, visit whattheythink.com/webinars

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