Multi-Client Study

SUMMARY

[2018 version of Inkjet Printing Market Forecast]

"The Latest Trend of the Inkjet Printing Industry Making Further Advances into the Industrial Printing Market"

= Detailed analysis of hardware devices, inks, and printheads traded in growing markets of textiles, commercial printing, and packaging printing=

"JP4" by Italian MS Printing Solutions, a textile printing market leader

"Primefire 106" by German Heidelberger drawing a lot of attention in the packaging market

June 2018
Data Supply Inc.
<Overview>

I. Theme

[2018 version of Inkjet Printing Market Forecast]


=Detailed analysis of hardware devices, inks, and printheads traded in growing markets of textiles, commercial printing, and packaging printing=

II. Abstract

In the industrial printing market, there's been an active shift to digital printing to partly replace conventional analog printing methods known as offset, screen, and flexographic printing. A digital printing method has made variable and high-mix low-volume printing jobs possible and marketing approaches built upon it available to best suit detailed individual printing needs. Some of such best known examples are DI and advertisements based on customer database, whereas personal photo albums and locally available product packages are also works of digital printing. In addition, digital printing technology is advantageous to large outdoor signage that is practically high-mix and low-volume in most cases.

Among digital printing methods, inkjet methods especially carry high expectations because they support non-paper media without contacting them. As for wide-format printing, inkjet printing technology is also mainly used for ceramic tiles, in addition to traditional poster printing and sign graphics. The textile industry is no exception. Inkjet technology is used to produce more than half of clothing products in Italy, home to high-end fashion labels, and Turkey and China that host huge apparel production bases are beginning to follow the move. The digital printing technology is expected to advance to the wall coverings and home textiles (bed sheets, cushions, and other items) industries. In contrast, the electrophotographic printing technology with dry toner was leading the market for high-speed printing devices, but inkjet devices are making inroads into various markets in recent years. Specifically, a market of variable, as well as high-mix and low-volume printing that usually come with several hundreds of small orders was originally cultivated by the electrophotographic printing technology but is now being taken over by inkjet printing technology, which is also advancing into mainstream markets of printing and publishing, commercial printing, as well as packaging and labels printing.

And yet, the industrial inkjet market is still at a growing stage. In the wide-format printing market, the open system that allows use of after-market inks competes fiercely against the closed system that only advocates for use of genuine inks. Even in the high-speed printing market, various companies are rushing to improve their water-based inks used for packaging printing but their research is only halfway done. Amid this, a major market disruptor, Amazon filed a patent application for a robotic system that uses inks as guides to cut fabric. The cutting guides can also be used for custom printing. As exemplified by this, many sorts of industries will need to be able to provide customized products moving forward, and inkjet printing is one of such product-customization technologies that will play a major role in the digital printing market.

Data Supply Inc.'s "2018 Inkjet Printing Market Forecast" will be a second publication continued from last year. We visited Italy this time, home to textiles products, and interviewed local makers to look into the industrial landscape so we can provide very intensive and updated market analysis. We truly hope the report serves as many professionals engaged in the inkjet industry as possible.

III. Items and Makers

1-1. Rival Markets

[Diagram showing analog printing, offset, gravure, flexography, screen, electrophotographic printing, production printers, monochrome, color]
1.2 Inkjet-related Items (main theme of the report)

2. Makers
   1) Hardware makers (16 makers in Japan and more than 70 from overseas)
   2) Printhead makers (8 makers in Japan and 4 from overseas)
   3) Ink makers (7 makers in Japan and more than 10 from overseas)
   4) Dye and pigment makers (8 makers in Japan and several from overseas)
   5) Others (post-processing equipment makers and parts makers)

IV. Research Period and Methodology
1. Research period
   The research period is set from 2015 to 2021 and target regions are Japan, North America, Europe, China, and other regions.
2. Methodology
   1) On-site and in-person interviews with target makers
   2) Analysis and review of open literatures, materials, statistics, and other sources
   3) Analysis of Data Supply’s own proprietary database

V. Format and Report Preparation Period
1. Research form: Multi-client study
2. Research period: January to March of 2018
3. Publication date: June 29, 2018 (Japanese version has been available since March 29, 2018)
4. Report format: A4 size (PDF format)
5. Price: $5,000-
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Extract from <Comprehensive Analysis> and <Inkjet Market>

*Tables are provided with figures and comments in the complete version.
Extract from *Comprehensive Analysis* and *Inkjet Market*

*Tables are provided with figures and comments in the complete version.*

- Total shipment value of printheads has been sharply increasing in recent years.

*Shipments of inkjet printheads (excluding D2 devices and modules for industrial applications) in the signage market*
Extract from *Inkjet Market*

*Tables are provided with figures and comments in the complete version.*
Extract from <Inkjet Market>

*Tables are provided with figures and comments in the complete version.