

FAST FOREWORDS

NEIL FALCONER

PRINT INDUSTRY STRATEGY CONSULTANT, PIRA



The world of wide-format printing will continue to experience rapid change during the next few years as a result of new technologies competing for dominance, but also from a variety of new end-user applications and customer expectations. Commercial wide-format products have proven to be very profitable in comparison to other print applications but creative

ideas and service offerings will need to be priced more carefully as the market becomes increasingly competitive.

From a technical perspective 2009 will deliver improved processing power, increased print speeds and print quality, with the capability to process larger, more complex colour files even more quickly. The number of packaging related jobs will grow dramatically and create more focus on the integration of finishing requirements.

The rapid advances being made in inkjet R&D will continue at a pace. The technology to keep an eye on is Memjet's moving nozzle wide-format device due for launch in 2009. The wide-format printer is expected to print at 150mm sec/linear speed at any web width with a very small footprint and extremely low energy consumption. According to Memjet, the future is capable of delivering inkjet technology that will print up to nine colours on two sides from five million nozzles, creating 100 billion drops per second.

If this prediction becomes reality, the landscape for wide-format printing in the future will change out of all recognition, presenting completely new opportunities across all print market sectors.

DAMIAN QUARMBY

MANAGING DIRECTOR, QUARMBY COLOUR



I am confident that there will still be growth and opportunities for wide-format throughout 2009. At Quarmby we are still making capital investments into the latest printing/cutting technology going.

The key is to stand out from the crowd and constantly look at new POS solutions tailor-made to each customer. There is no doubt that longer

print runs continue to diminish whilst shorter bespoke runs increase with greater frequency. The effect of the recession's grip in other sectors will force service levels to improve and there will be no room for complacency.

AS WE WAVE GOODBYE TO 2008 WE ASK A SMATTERING OF MOVERS AND SHAKERS TO LOOK INTO THE FUTURE AND PREDICT WHAT LIES AHEAD FOR WIDE-FORMAT IN 2009.

MICHAEL JOHNSON

CHIEF EXECUTIVE, BPIF



InfoTrends research reveals that sign and display sector printers increasingly face demands for just-in-time production, shorter runs and web-to-print facilities as well as personalisation and other added value services. Developing technologies should help them meet these challenges, with inkjet now providing faster speeds using fully automated printers and wider heads, lower initial investment and running costs, improved productivity and greener printing. However inkjet is also opening up new markets for wide-format, including labels, cartons, textiles and ceramics.

Future challenges include UV curable ink printers for high-end work, higher print speeds on high-end printers, availability of hybrid printers at the lower cost end, reduced energy consumption and solvent usage, safer materials handling, and recycled and recyclable substrates. The use of digital technologies enables companies to add more value to customers through services such as data management, marketing campaigns, targeting and personalisation.

SHANE BURCHETT

LFP PRODUCT MANAGER, CANON UK



Large-format print is in the strong position of being a cost-effective way to ride out the economic storm. Recently, we have seen significant interest in LFPs as a way of not only cutting print outsourcing costs but of also providing excellent revenue generating opportunities.

As we move into 2009, it is important for businesses to streamline their practices. But it is important that ways of adding value are also considered. By investing in LFPs printers can offer new services that allow them to differentiate themselves.

KEVIN WHEELER

BUSINESS DIRECTOR DIGITAL SOLUTIONS, ROBERT HORNE



We must all strive for greater efficiency, be closer to customers and suppliers, be able to differentiate and offer meaningful added-value.

Robert Horne expects solvent and aqueous printer sales to remain at a high level with UV sales increasing thanks to our Vutek offering and new level entry UV products from Mimaki and HP. The new HP latex printer will

generate much interest in 2009.

NANCY JANES

SIGN & DISPLAY COUNTRY MANAGER UK&I, HP



I expect the same economic conditions that we are experiencing in the second half of 2008 to continue into the first half of 2009 - in essence cash will be king! For the printer this presents challenges and opportunities.

The challenges will be: maintaining sufficient cash flow in order to be agile enough to respond to sudden changes in customer demand; having a close enough relationship with their customers to forecast production levels in order to predict required investment requirements; having the right balance on in-house production versus outsourcing; truly understanding the ROI and TCO of digital versus analogue production; being able to finance investments; and having a flexible workforce.

Opportunities will come though: taking advantage of manufacturers' finance programmes; by utilising manufacturer's ROI tools; and by producing new applications made possible by new technologies.

Printer partnerships and industry networking will be key.

JERRY DAVIES

MANAGING DIRECTOR, ROLAND DG (UK)



Few can doubt that 2009 will be a challenge to businesses of all sizes. However, the past has taught us that some companies will actually thrive in adversity. I expect that many will invest in equipment to ensure that their businesses are robust or to access lucrative niche markets.

The reliability of machinery and access to service cover will be key to the success of many printers, who will demand more from manufacturers, such as free software upgrades and support.

While investment in wide-format equipment is essential in tough conditions, companies will also look to operate with higher cash balances to insulate themselves against the unexpected.

I would also expect companies to be far more prudent in how they approach commercial relationships.

DUNCAN JEFFERIES

MARKETING MANAGER, HYBRID

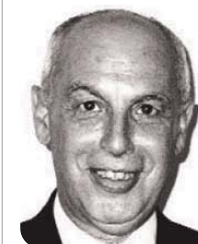


Increased attention on green issues will continue to dominate, along with a drive to lower costs in all areas of business. The launch of the entry-level priced, but high end featured printers will deliver a hugely competitive wide-format option. Mimaki's new 1.6m wide, roll-to-roll / flatbed printer couples environmentally friendly LED cured UV ink with significantly

reduced power consumption for under £40k. Whilst solvent printers will remain a mainstay, the reduced entry costs and general ease of use will see UV technologies grow.

SIDNEY BOBB

CHAIRMAN, BAPC



Print businesses are looking for new markets and services to help retain existing customers and attract new ones. Similarly, customers are looking for new more effective ways to promote themselves, their products and events. This certainly creates an opportunity for wide-format printing and as the entry-level investment required can be modest more

commercial printers will look very seriously at the opportunity such printing offers.

While the traditional print market will almost certainly face tough times during the year the opportunities offered by wide-format may go some way to alleviate the downturn and provide a new and valuable income source for printers.

JEFF BIGGS

MANAGING DIRECTOR, COLOURGEN



With new printer sales likely to be down by 30-40%, 2009 looks like being a tough year for those that rely on equipment sales. Colourgen will however be introducing some innovative products. We anticipate fairly strong sales from new Epson and Seiko printers, despite the potential market being less than it might have been 12 months ago. The credit

crunch itself will make financing some deals harder so many will require a more innovative approach to asset finance.

I expect consumables sales to be less affected by the current economic climate. However, the pound is likely to remain weaker during 2009 than it has been over the last four years, which means that purchasing of consumables will remain at their current higher than normal levels.

Difficult trading conditions will put a lot of pressure on the industry and the less well-managed and poorly structured businesses are likely to struggle and I expect further consolidation in terms of the number of global manufacturers producing digital print equipment, Rips and consumables.