
The Current and Future Status of Inkjet Technology in the Graphic Arts Market

Table of Contents

1	Introduction	6
	Objectives & Proposed Analysis	6
	Methodology	7
	Primary Research	7
	Secondary Research & Analysis	8
	Report Organization	8
	Glossary of Acronyms Used in This Report.....	10
2	Executive Summary.....	11
	Summary Answers to Core Research Inquiry	11
	Bottom Line	11
	Replacement vs. Incremental Market	12
	The Appeal of Inkjet Technology.....	12
	Current & Future Impact on Existing Graphic Arts Products	13
	Size of the Inkjet Market	13
	Channels for Commercial Inkjet Output	14
	Capabilities of Inkjet Technology	15
	Future of Inkjet Proofing.....	15
	Drivers of Inkjet in the Commercial Printing Market	16
	Barriers To Inkjet in the Commercial Printing Market	17
	The Relationship of Inkjet to Color EP in the Commercial Printing Market	19
3	Printers.....	20
	Obstacles and Drivers for Inkjet Usage.....	20
	Obstacles.....	20
	Drivers	20
	Inkjet's Impact on Existing Traditional Applications	20
	Survey Results.....	21
	Printer Profiles & Print Process	21
	Print Process	22
	Industry Trends.....	24
	Digital Printing Technologies	28
	Proofing	30
4	Trade Shops/Service Bureaus.....	33
	Obstacles and Drivers for Inkjet Usage.....	33
	Obstacles.....	33
	Drivers	33
	Survey Results.....	34
	Trade Shop Profiles	34
	Print Process	36
	Industry Trends.....	38
	Digital Printing Technologies	41
	Proofing	43
5	Print Specifiers	44
	Obstacles and Drivers for Inkjet Usage.....	44
	Obstacles.....	44
	Drivers	44
	Survey Results.....	44
	Print Process	47
	Industry Trends.....	52
	Digital Printing Technologies	53

	Proofing	54
6	Inkjet Technology Primer.....	57
	Inkjet Technology	57
	Theoretical Strengths	57
	Perceived & Real Weaknesses	58
	Inkjet Technology Types	58
	Drop On Demand (DOD).....	58
	Continuous Inkjet (CIJ).....	60
	Critical Inkjet Performance Criteria	61
	Inkjet Speed	61
	Inkjet Image Quality	62
	Inkjet Reliability	62
	Inkjet Chemistry/Media Independence	63
	Inkjet Cost vs. Traditional & EP Technologies	63
	The Relative Fit of Inkjet & EP in the Graphic Arts	66
	Investment \$.....	66
	Width Capabilities	66
	Inkjet Still A Young Technology	67
	Bottom Line	68
	Potential for Hybrid Modular System/standalone inkjet full color press	68
7	Non-Office Digital Printing Markets	70
	Introduction	70
	Existing and Prospective Non-office Digital Print Markets	72
	Wide Format Graphics Professional Inkjet	77
	Wide Format Graphics Corporate Inkjet	78
	Textiles Inkjet.....	78
	Fine Art Inkjet.....	79
	Packaging (not coding) Inkjet	79
	Computer To Plate Inkjet	80
	Labels Inkjet.....	80
	Labels EP	81
	Dedicated Photo Kiosks Inkjet	81
	Photo EP.....	82
	Imprinting Inkjet	82
	Imprinting EP	83
	SOHO Inkjet.....	83
	Coding & Marking Inkjet.....	84
	Modular Hybrid Digital/Traditional Press Inkjet	84
	Standalone Digital Press Inkjet	85
	Standalone Digital Press EP.....	85
	Color Copier EP (<20ppm)	86
	High Volume Color Copier EP (>20 ppm).....	86
	Color Laser Desktop EP.....	87
	Hi-Speed Monocolor Laser Repro/Print EP	87
	Proofing Market – General.....	88
	Types of Proofing.....	89
	Hard Copy Proofing.....	89
	Other Types of Proofs.....	91
	Graphic Arts Applications.....	92
	Target Specifications for Output System.....	93
	Image Quality and Format	93
	Cost.....	94
	Speed.....	95
	Target Market Sectorization & Quantification	95
	Commercial Printers	95
	Trade Shops	95

GA Design & Ad Agencies.....	95
In-House GA Departments	96
Digital Proofing Technologies	96
Analog Proofing.....	96
Digital Proofing	96
8 Channels for Wide Format Digital Printing	99
Introduction.....	99
Color Photo Labs.....	102
Reprographic Firms.....	104
Digital Color Print Shops	107
Graphic Arts Service Bureaus	108
Billboard Providers/Printers.....	111
Quick Printers.....	113
Screen Printers.....	116
Sign Shops.....	118
Exhibit Builders.....	120
9 Digital Fine Art Printing.....	122
Introduction	122
Defining ‘Art’ vs. ‘Design’	123
Market Segmentation	123
Overall Market Opportunity.....	125
Drivers.....	127
Issues	129
Market Needs and Requirements.....	129
Trends.....	131
Customers—Who’s Buying?.....	131
Output Devices.....	132
Media.....	132
IAFADP	132
10 Major Non-Office Inkjet Vendor Profiles	136
Aprion Digital	136
BARCO Graphics.....	138
Canon Aptex.....	140
Chromas Technologies.....	142
MacDermid/ColorSpan	143
Domino.....	144
Durst-Dice.....	145
ENCAD.....	146
Epson.....	147
Hewlett-Packard	149
Inca Digital Printers Ltd.....	151
Kodak	152
Konica	154
Marconi Data Systems	156
Mimaki	158
Mutoh	159
NUR Macroprinters Ltd	160
Perfecta Print.....	161
Raster Graphics Inc.....	162
Roland	163
Scitex Corp, Ltd.....	164
Scitex Digital Printing.....	165
Scitex Vision	167
SII.....	168
VUTEk	170
11 Appendices	171

Scope & Description of Targeted Primary Research Interviewees	171
Primary Research Questionnaires.....	173
Rationale for Questionnaire Design & Content	173
Contextual Research: Significance of Questions Asked	174
Direct Research: Explanation of Significance of Questions Asked.....	176
Head Technology Suppliers Listing	177
Blank Questionnaire.....	178
Questionnaire Variations between Target Interviewee Communities	189