



# WIDTHWISE 2017

**An Image Reports publication**

The tenth annual survey and report  
on the state of the UK and Ireland's wide-format print sector



in association with

**FUJIFILM**  
Value from Innovation

*1600 II*

*3200 R*



**Driven by Fujifilm Technology** Designed for Creativity

**AcuityLED 1600 II**

**Now even faster and more versatile, with simultaneous colour, white and clear ink printing.**

Powered by Fujifilm's leading printhead and ink technologies, this is a reliable production machine built to deliver exceptional results.

**AcuityLED 3200 R**

**Produce high quality superwide display and exhibition graphics in the most cost-effective way.**

With low energy LED UV curing technology, the Acuity LED 3200R delivers excellent production efficiency with impressive productivity.



## Welcome back...

It's a decade since Image Reports embarked on what was to become an annual 'state-of-the-sector' investigation and analysis of the UK and Ireland's large-format digital print sector. An enormous amount has happened in the intervening years as all of you who have been involved during the period will recognise, but what has remained constant is the entrepreneurial spirit of those responsible for building what is one of the most vibrant parts of the print industry. That's not just my personal opinion - the stats from the Widthwise Survey 2017 speak for themselves - and they're all here for you to digest in this tenth anniversary Widthwise Report.

Once again we bring you grassroots data - from 243 UK/Ireland based PSPs operating in the wide-format digital print space - together with informed analysis and editorial comment. And, to put all that in global context, there's also a data-based piece from Lightwords.

I'm now off to plan the 2018 Widthwise Survey, so let me know if there are areas where you feel we need to gather more information!

**Lesley Simpson**  
Editor, Image Reports magazine  
[lesley.simpson@imagereportsmag.co.uk](mailto:lesley.simpson@imagereportsmag.co.uk)

## Contents

- 04 Key findings**  
For those wanting a quick reference to the main outcomes from the Widthwise Survey 2017.

### 10 Years On:

- 08 Those were the days my friends...**  
A look at the technological milestones that have impacted the wide-format digital print sector over the last ten years.
- 12 Past, present and future**  
How three PSPs have transformed over the last decade, and where they expect the next one to take them.

### Business Section:

- 20 Widthwise Survey: business findings**  
This year's poll indicates a buoyant wide-format sector confident about its long-term future, but with short-term worries.
- 26 Taking a wider view**  
Peter Mayhew, director of Lightwords, delves into the 2016 shipment data from manufacturers, distributors and resellers as well as PSPs.
- 32 Going for growth markets**  
Much is made of opportunities in markets like textiles and packaging. But are large-format PSPs paying any attention?

### Technology Section:

- 38 Widthwise Survey: technical findings**  
When it comes to investment in new technology, never have the words 'cautious optimism' been so apt.
- 44 Future gazing**  
Software, inks, media and finishing suppliers do the crystal ball thing.

### Environment Section:

- 48 Widthwise Survey: environmental findings**  
Are opinions and actions now as divided as they can get?
- 50 An interview: John Thackara**  
Why this sustainability expert thinks we need to switch from an environmental policy of 'do less harm' to 'do more good'.



Editor: Lesley Simpson  
[lesley.simpson@imagereportsmag.co.uk](mailto:lesley.simpson@imagereportsmag.co.uk)

Design: Alex Gold

Advertising Manager:  
James Magnani  
[jamesm@imagereportsmag.co.uk](mailto:jamesm@imagereportsmag.co.uk)  
Tel: 020 7933 8976  
Fax: 020 7933 8998  
[www.imagereportsmag.co.uk](http://www.imagereportsmag.co.uk)

Image Reports  
SJP Business Media Ltd, 2nd Floor.  
52-54 Gracechurch Street, London, EC3V 0EH  
Printed in Great Britain. ISSN 1478-338X

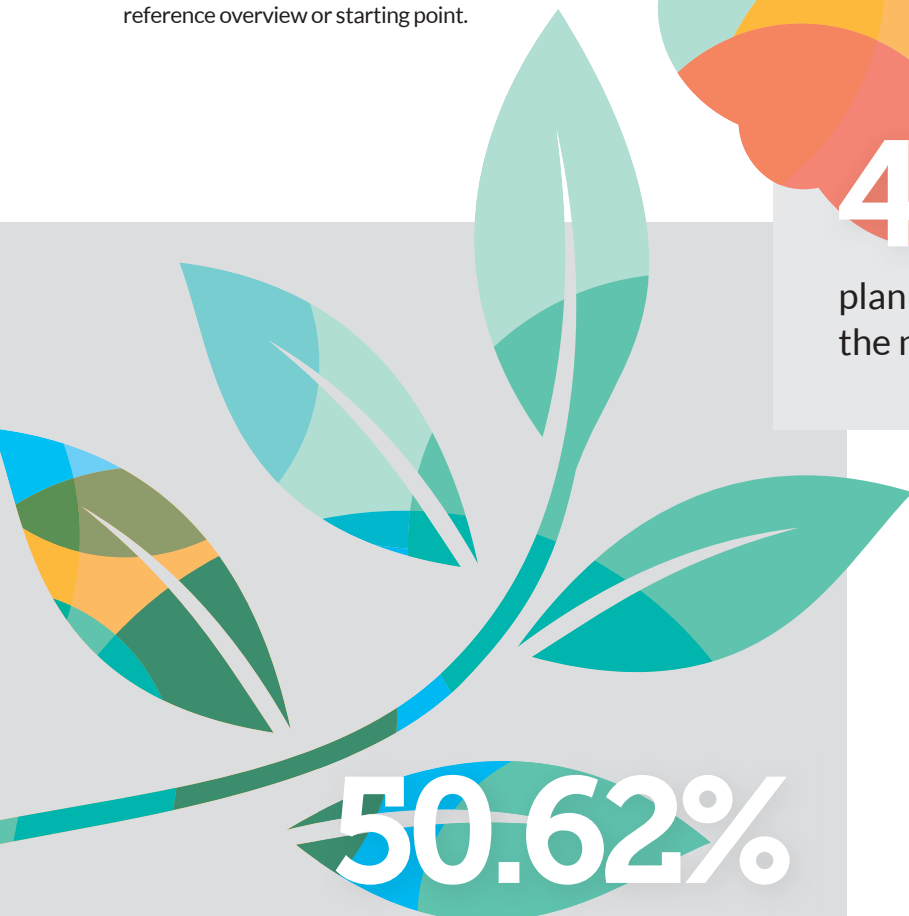
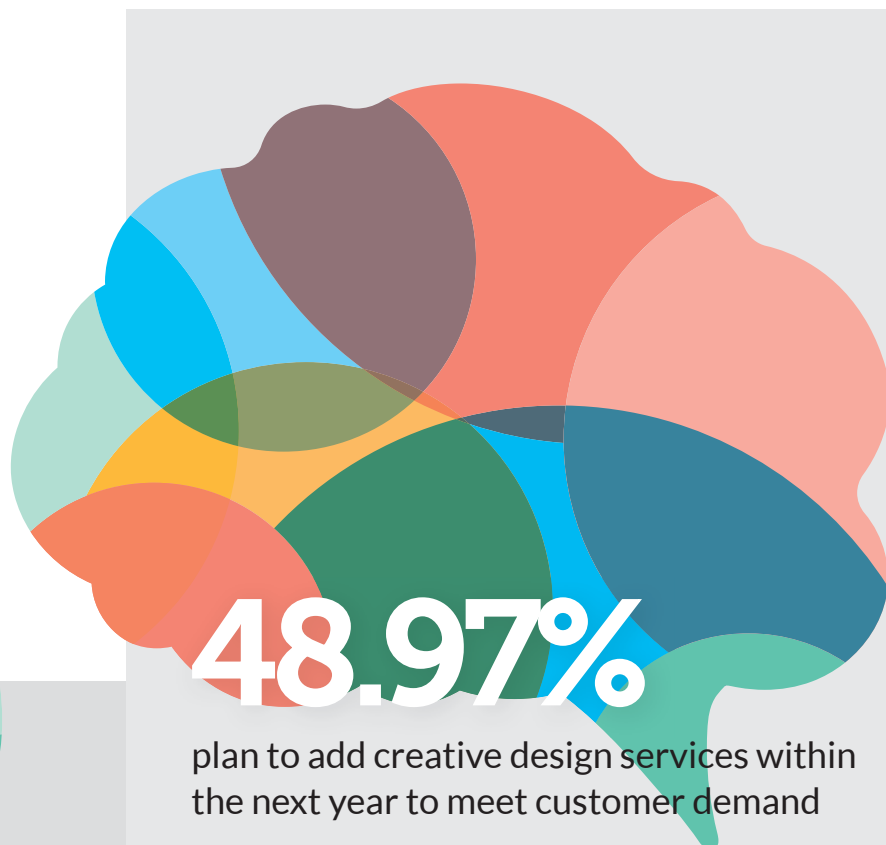
No part of this circulation may be reproduced, stored in a retrieval system or transmitted by any means without the Publisher's permission. The editorial content does not necessarily reflect the views of the Publisher. The Publisher accepts no responsibility for any errors contained within the publication.

# Widthwise 2017: ten years on

# 243

PSPs from within the UK/Ireland and involved wide-format digital print provided the data for

this tenth annual Widthwise Report, intended as a strategic business development tool for those involved in the sector. The information collected at the start of 2017 through a two-month long online/telephone Widthwise Survey can be found sectioned under business, technology and environmental headings within this publication – with graphs and analysis providing a detailed picture of the domestic digital inkjet print market. In this opening editorial, the key findings are presented for those of you wanting a quick reference overview or starting point.

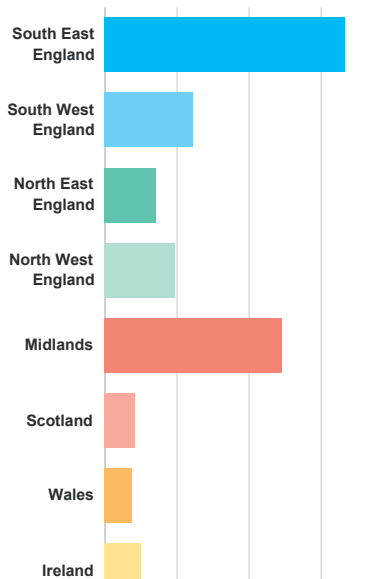


of the PSPs that took part said they are confident of growth

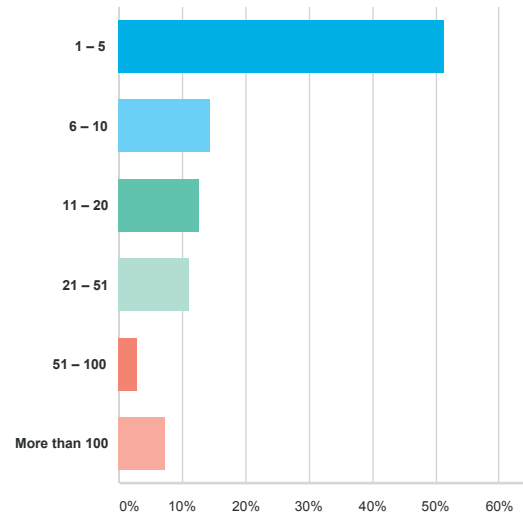
The spread of PSPs responding to the Widthwise Survey (graph 2) pretty much reflects the overall geographical shape of the large-format market in the UK/Ireland, likewise in terms of size and turnover (graphs 3 and 4). As you will see, just over half of respondents (51.44%) have five or fewer employees, though 7.41% have more than 100. 41.98% turnover less than £250,000 per year, while over a tenth (11.93%) record more than £5m. The great thing, is that this survey captures the figures, facts and views of those from both ends of the spectrum, and of those in between.

In terms of how much wide-format print the respondents undertake in relation to the rest of their business activities (graph 5), 5.35% said it accounted for their total turnover. For 27.16% it was below 20%

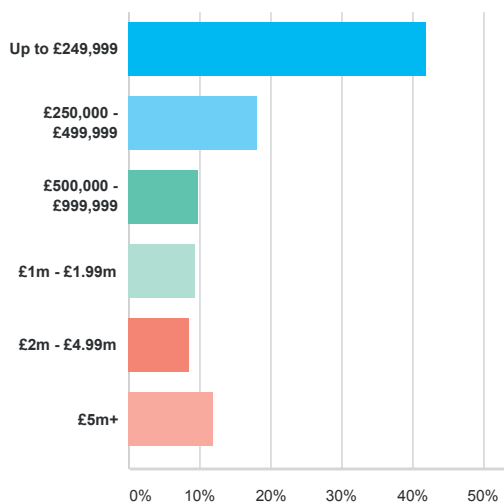
## Q2 Where is your main business based?



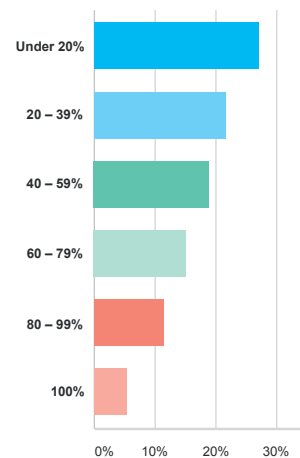
## Q3 Number of employees in your company



## Q4 What is your company's total turnover?



## Q5 What percentage of your turnover is wide-format digital print?



of turnover, but don't expect things to stay like that for long. Well over half of those questioned (62.55%) said they expected wide-format to account for a larger proportion of their turnover in the next two years (graph 6) - only 4.53% expected it to drop. What's more, a whopping 79.01% said they expected their large-format turnover to grow in 2017 (graph 9).

Could that focus on increasing large-format turnover have anything to do with the fact that 41.15% saw an increase in large-format margin in 2016, and slightly more than that (43.62%) having reported that wide-format margins were better

than those in other parts of their business (graphs 7 and 8)?

Looking at markets, the 'traditional' areas of general flags/banners, exhibition and display graphics and posters showed the largest number of participating respondents (graph 11) as you would expect, and areas like murals/wallpapers have climbed up the listing of where PSPs were most active at the start of this year, with a quarter (25.51%) involved in that type of work. 44.44% said they were undertaking window graphics and 30.04% floor graphics. Interestingly, given all the hype about



# THE FUTURE OF PRINT & CUT

## New Cutter

Increased down force and accuracy.

## 4 New Printheads

Precision droplets in 3 sizes and a wide print pass deliver high-quality output and efficient ink usage.

## New TrueVIS INK

Vibrant, fast-drying inks in 500cc pouches with reusable holders.

## New LED Lighting

Illuminated print carriage and maintenance area.

## New Powerful VersaWorks Dual RIP Software

Supports PostScript and PDF natively for improved file reproduction.

## 3 Ink Configurations

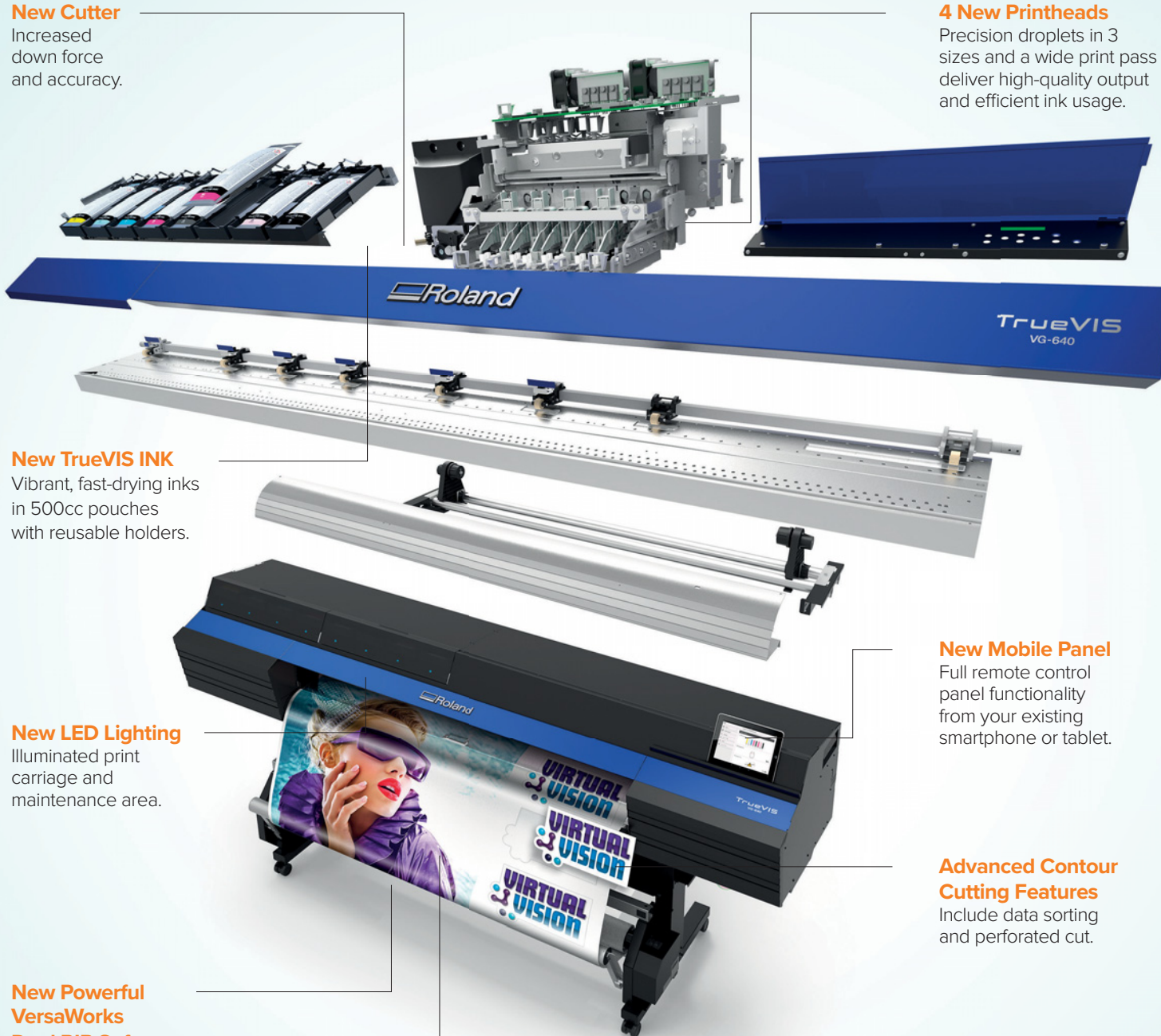
Dual CMYK, 7 colour (CMYKLcLmLk), 8 colour (CMYKLcLmLkWh).

## New Mobile Panel

Full remote control panel functionality from your existing smartphone or tablet.

## Advanced Contour Cutting Features

Include data sorting and perforated cut.



Discover the new TrueVIS VG Series, available in 64" and 54" models at [rolanddg.co.uk](http://rolanddg.co.uk) or call 01275 335 540

Imagine.  Roland



# 41.56%

said they expect to buy a new digital large-format printer in the next two years – exactly the same percentage who said they won't be!

What is really great is that half (50.62%) of the PSPs that took part said they were confident of growth (graph 19). The downside is that 16.05% were more anxious about their business's prospects than they were last year- the rest concerned but less so than in 2016.

The biggest concerns for PSPs in 2017 (graph 22) came out as the price of supplies (59.26%) followed by the impact of Brexit (51.85%).

In terms of investment, nigh on a third (32.10%) of respondents said they expect to spend more on equipment and products across their company in 2017 compared to 2016 (graph 27). Nearly the same again (30.86%) said spending levels would remain about the same, while 28.81% noted a zero spend in each period.

When it comes to buying a new digital large-format printer specifically (graph 28), 41.56% said they expected to do so in the next two years – exactly the same percentage who said they wouldn't be!

Asked if they thought their company would still be in large-format print in another 10 years' times, the great majority (88.48%) said yes (graph 20) – and two thirds (68.72%) said they expected it to make up more of their turnover (graph 21). ●

textiles, while 15.64% said they handled soft signage, few said they were involved in garment (6.17%) or interiors (5.76%) markets.

Asked which markets they would move their own business into over the next two years (graph 13) 8.23% said they would get into soft signage, but it's not looking like UK/Ireland PSPs are picking up on the oft flaunted opportunities in printed garments – where still only 3.29% said they would hope to make inroads – or in textiles for the home/interiors, where 4.53% said they would look to move. Other potential areas of diversification like packaging and cardboard engineering showed low level interest too. And when it came to industrial speciality print under 1% (0.82%) said it was a target area.

There are plenty of reasons why the above may be the case - and they're explored later in this report - but it's worth noting that business' priority for the next year remains growing turnover – placed top of optional categories (graph 14) by 74 (33.64%) of the 243 respondents. Entering new markets came way down the chart, with just 4.44% saying it was their number one priority.



# 68.72%

expect large-format digital inkjet print to make up more of their turnover in 10 years' time

# Those were the days my friends...

Richard Stuart-Turner looks at key changes in the technology used in the wide-format print sector over the last ten years.



**A**s this is the tenth publication of the Widthwise Report, it would be remiss not to look back at some of the technological milestones of the last decade that helped to drive the wide-format print sector forwards.

The continuing migration from analogue to digital inkjet meant the period saw plenty of developments for those dipping their toes into the digital market for the first time - and for seasoned early adopters looking to take their digital business to the next level.

One of the most significant 'milestones' if you like, was in 2008 with HP's announcement of Latex - an outdoor durable ink technology that has an aqueous base. Latex technology proved significant, particularly among SMEs, and others followed suit, Mimaki launching the JV400LX and Ricoh unveiling its Pro L4000, both in 2012.

Indeed, the continued take-up in alternative technologies to solvent-based machines has been another key trend. That said, solvent-based technology remains popular, with safer and more environmentally-sound low-solvent and eco-solvent inks in particular continuing to gain traction.

Epson launched its UltraChrome GS inks, an eight-colour eco-solvent inkset, as well as its micro-piezo printhead technology, in 2008. Last year the manufacturer moved on to its GS3 inkset, which features improved chemistry to decrease ink consumption.

UV inks, meanwhile, have also evolved and are now less brittle and therefore more suitable for printing onto flexible media. This has helped to boost the popularity of UV flatbeds and roll-to-roll machines, which are also a lot faster and printing at higher quality than a decade ago due to improvements in printhead technology.

Take EFI's Vutek GS5000r and GS3200 machines, for example. Launched in 2009, they quickly became key products in the company's portfolio, with the 5m-wide roll-to-roll GS5000r capable of producing 288m<sup>2</sup>/hr of sellable output and the 3.2m-wide flatbed/roll-to-roll hybrid GS3200 printing at up to

111.5m<sup>2</sup>/hr in high-quality mode.

Inca Digital, meanwhile, continued to push forward with its Onset digital UV flatbed range, first launched back in 2007. A landmark machine for those working at the industrial end of the market, the original Onset could print POP at up to 500m<sup>2</sup>/hr while the Onset X3, launched in 2015, prints at up to 900m<sup>2</sup>/hr.

LED curing has been another major UV trend, ever since Mimaki launched its UJV-160 hybrid UV LED inkjet printer in 2008. With benefits including low power consumption and the environmental advantages of LED over mercury lamps, other manufacturers soon introduced their own LED hardware. Notable machines included Fujifilm's Acuity LED 1600 and Roland DG's VersaUV LEJ-640, both launched in 2011.

With PSPs continually looking to save time and effort, print and cut machines also proved popular and Roland DG and Mimaki were at the forefront of this movement too, the former with its VersaCamm and subsequent TrueVis ranges, and the latter with its CJV series.

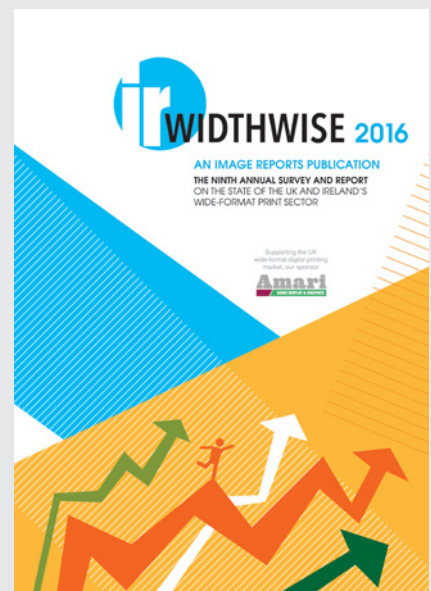
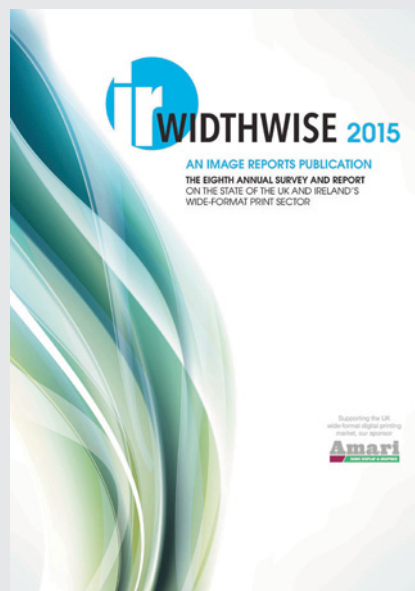
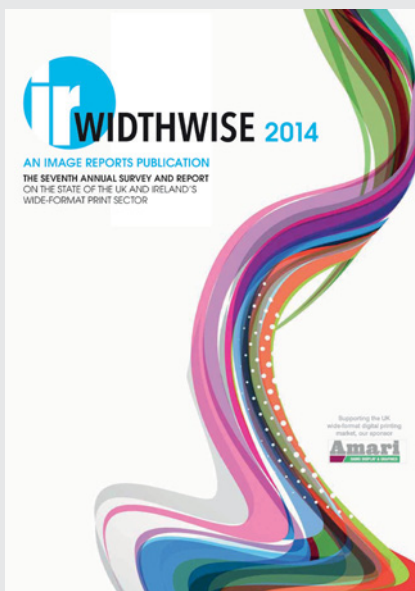
Digital textile printing has also seen substantial progression, with a variety of direct-to-textile and dye-sub printers coming onto the market from the likes of Mimaki, Durst and MTEX.

One of Mimaki's key launches was the JV5-320DS in 2010, which enabled its customers to print directly to polyester for the first time. The company has since also moved into the industrial textile space with the launch of the Tiger-1800B last year.

Going forwards, speed and quality look set to continue to increase, and this is being particularly driven by new and emerging technologies. Canon's UVgel, for example, is said to address the limitations of eco-solvent and latex technologies, while single-pass inkjet printing caused a stir at Drupa last year thanks to machines such as EFI's Nozomi C18000 and Durst's Rho 130 SPC, both aimed at high-speed corrugated board production.

With increasing automation and further industrialisation of print also tipped for the next few years, wide-format continues to be a sector where change and opportunity go hand-in-hand. ●





# Diversify creatively: The Fujifilm Acuity LED 1600 II

Built with cost-effective, low energy LED UV curing technology, the Acuity LED 1600 II is designed to produce exceptional print results in the most environmentally friendly way



## NEW MARKETS, NEW REVENUE

One of the stand-out trends of the printing industry in recent years has been diversification – investing in the capability to offer new products and services to new and existing customers, adding additional revenue streams and gaining an edge on the competition.

As a simple, cost-effective way to branch out, offering versatility with reliability and quality – the Fujifilm Acuity LED 1600 II hybrid printer is tough to beat. Using ultra high-quality Fujifilm UV ink, users can print to roll or rigid media and produce decorative and creative prints such as wall coverings or carton packaging.

## ADDED COLOURS, ADDED VALUE

To offer added value to quality-conscious customers, the Acuity LED 1600 II's eight colour Uvjet LL ink set features white and clear, as well as CMYK, light cyan and light magenta. Clear ink offers a luxury look to highlight and enhance print with high-gloss spot finishes, while high density white ink can be used to produce creative effects on clear and coloured media. White and clear inks can also be printed simultaneously and colour-white-colour

## AcuityLED1600

layers can be printed in one pass for vibrant two-sided images on transparent materials. Designed for creativity, Fujifilm Uvjet inks offer excellent adhesion to a wide range of standard roll and rigid media and interesting materials such as coloured media, clear media and mirror board. Simultaneous two or three-layer printing with colour, white and clear inks provides the ability to produce high value creative prints that can dramatically expand your service offering.

## COOL RUNNING, WITH STAMINA AND SPEED

Aside from the energy efficiency of the Acuity LED 1600 II, low-heat LED curing also means that it can work with a huge range of heat-sensitive media such as vinyls and thin films without damaging them. Furthermore, as the press produces no wasted heat, VOCs or ozone, it can be installed in any production environment without dedicated extraction, making it simple and safe to use. LED lamps consume far less energy than conventional UV and last up to ten times longer, making them highly cost-effective in the long run. Robustly built, Acuity LED 1600 II printers are designed for continuous production and many owners run them 24/7. A range of print modes is available to provide production speeds of up to 33m<sup>2</sup>/hr. Fitting and removing flatbed feed-and-receive tables for switching between roll and rigid printing takes just a couple of minutes, and with the LED lamp requiring no warm-up time, prints can be produced immediately and are instantly dry, so there is no delay before finishing or shipping.

## POWERED BY FUJIFILM INKJET TECHNOLOGY

The inks, printheads and LED curing system used in the Acuity LED 1600 II are all proprietary Fujifilm technologies, designed to deliver quality images at speed. The machine uses eight Fujifilm Dimatix Q-class printheads, which operate with speed and precision and have a track record of long life in high performance production. VersaDrop™ multi-pulse jetting delivers droplets of different sizes according to the definition needed by the image to produce smooth changes in tone, while Fujifilm's Micro-V ultrafine dispersion production technology produces high pigmentation for strong, vibrant images and a wide colour gamut. These technologies in combination deliver smooth tones and outstanding close-up clarity. ●

*For more information or to request a sample for either the Acuity LED 1600 II or the Acuity LED 3200 please contact Fujifilm on 01234 572340, email at [graphicsmarketing\\_uk@fujifilm.com](mailto:graphicsmarketing_uk@fujifilm.com) or visit [www.powerofinkjet.com/wideformat](http://www.powerofinkjet.com/wideformat).*

## Acuity LED 3200R

# Superwide, super value: The Fujifilm Acuity LED 3200R

With all the benefits of quality, reliability and efficiency of the smaller Acuity LED 1600 II, powered by the same industry leading Fujifilm Inkjet Technology and featuring the same high-quality Uvijet UV inks and efficient LED curing, the Acuity LED 3200R also offers a range of additional benefits to wide format printers

### **SUPERWIDE OR DUAL ROLL: PRINT MORE AND PRINT FASTER**

The Acuity LED 3200R offers the option of printing vibrant superwide applications – up to 3.2 metres across – or as the occasion demands, achieving maximum production efficiency when producing smaller jobs by printing on two rolls at the same time. It prints the same job or different jobs, nested images, duplicates or tiled images with ease and the Acuity LED 3200R also includes an automatic media width detection feature to enable seamless movement between different sized media.

For signage designed for longer viewing distances, a 110m<sup>2</sup>/hr high productivity printing mode enables the production of a 3.2 x 4.2m banner in just 7 minutes. Ultra high-quality images can be printed at a still impressive speed of 60m<sup>2</sup>/hr – double that of the Acuity LED 1600 II. For a high production environment, the Acuity LED 3200R can play a vital role in increasing all-important turnaround times, while also offering ultra-high quality where required.

### **PRINT QUALITY MANAGEMENT ON THE GO**

An in-built print quality system enables high-quality printing to continue without running a separate cleaning cycle and is perfect for completing rush jobs without compromising quality. Missing or defective printhead nozzles are automatically detected and cleaned. Nozzles that don't clear automatically are replaced by other functioning nozzles while production continues. Furthermore, a built-in illuminated panel allows backlit prints to be checked as they are printing, so there is no reduction in uptime and no production interruptions. Errors can be quickly spotted and corrective steps taken, reducing media waste, saving time, ink and money and ultimately boosting profitability.

### **A HEAVY PRODUCTION MACHINE**

The anti-banding function on the Acuity LED 3200R provides a dispersed edge to the print

passes, allowing faster print modes to be used without banding, ideal for heavy production. Its bulk ink system holds three litres of ink per channel. This means that ink replenishment is required less frequently and can be done more cost-effectively. When considered in combination, these benefits make the Acuity LED 3200R ideally suited to continuous 24/7 operation, especially as the machine can also be configured to send email alerts in the event of any problems.

### **MORE VALUE-ADD OPTIONS**

In addition to the multiple benefits that come as standard with the Acuity 3200R, there are a range of additional value-add options to consider:

- **Static suppression kit:** removes the static electricity charge that can affect print quality on PVC and similar materials – offering increased quality assurance
- **Soft media feeding kit:** perfect for achieving optimal, stable printing on thin or soft materials that could tear or crease when moving through the printer
- **3.2m roll shaft:** prevents crease formation in materials that tend to crease when using a media stand
- **Media lifter:** enables the easy loading and unloading of large rolls up to 200kg. ●





# Past, present and future

Here we look at three companies that have been involved in large-format digital print since the start of Widthwise a decade ago, looking at key impacts during that period, and expectations for the next ten years.



Leach

According to Richard Leach, over the next ten years we'll see "internationalisation become a much bigger thing as country boundaries become less of an issue." He adds: "We're preparing to do more work overseas - in Europe and beyond - and also see to more work coming in from overseas."

As MD of an £11m turnover business that's weathered many changes in its 126-year-old history his expectation is no doubt worth due consideration, and when he says "our growth aspiration is for overseas work to account for about half of our turnover by 2027, a target we think is realistic because the brands want us to push against geographic boundaries and I think we're pushing against a reasonably open door," it makes sense to take stock.

"About 25% of our workload currently goes overseas. Ten years ago it was less than 5%," says Leach, who points out that the company has grown staff and turnover pretty much year-on-year over that period, following a move to its current Bradley site near Huddersfield in 2005. What began in nearby Brighouse in 1991 as a photo-lab under his great-grandfather's ownership

has morphed into what he now describes as a "creative graphics solution provider" that delivers "graphic displays and display structures that transform brand and visitor environments" via its three arms: Leach Impact handling branded environments (retail); Inspire working across visitor attractions (museums, galleries etc); and Studio, being the creative design and interpretation arm.

"The print market as a whole has become much more competitive over the last decade. Within it large-format has been one of the healthiest sectors, but it too has felt competitive forces, even while it has enjoyed significant growth in terms of volume and market opportunity. What has become apparent to us at Leach is that we need to stand out by producing something different and that will help us forge strong customer relationships. Our key customers bases are retail and visitors attractions/exhibitions and I think that's where we'll continue to concentrate going forward - but not just in terms of providing printed graphics. For some years now we've been working to ensure we can provide an impactful visual experience in a space, and we now have an innovations

team pushing ahead with developing solutions that enable us to do that."

Leach's investment in technology has been around £500,000 a year for the last ten years, the latest significant spend being on a Durst 512 in the summer of 2016. "Our main investment now needs to be in people, who will push forward with product innovations," adds Leach, pointing out that going forward more effort will be put into "developing Leach's intellectual property and professionalising our R&D."

The company doesn't currently hold any patents, but that's not to say it has been slacking on the development front - it has designed and built a mounting rig that allows it to install single piece bespoke printed wallcoverings up to 5m high and at any length, made many inroads in illuminated lightbox technology, merchandise and exhibition display systems etc.

Looking ahead Leach says "textile print is also a big thing for us - using flexible UV ink, not dye-sub. We have the technology and knowledge-set to bring real benefits to customers, and in terms of overseas work, it's much easier and more economic to pack and transport!" ●



## Kingswood

Ten years ago you would not have thought of Kingswood iOptus as a large-format printer. Even this time last year you might have been of the opinion that this was a company that - specialising in legal and commercial printing for London-based clients from its Clifton Street premises in Shoreditch - had little to do with large-format digital. To some extent that's right, but the company, which was formed in 1995, has actually run large-format kit for many a year, though it was only last summer that it made more of a noise about the fact, when it formally set-up a large-format arm known as Kingswood Display at a new site in Swanley, Kent, and furnished it with an EFI Vutek H1625 LED and Vutek GS3250lx Pro LED. Alongside those sit two HP Latex 570s and finishing kit including a Kongsberg cutting table.

The initial investment - of around £750,000 - in the new operation, is what really opened people's eyes to the fact that Kingswood provided a large-format service - something it carried out on a relatively small scale in-house in Shoreditch as well as farming out up until then. But it was the appointment this February of various people from defunct-Clicks, most specifically its former chief Alan Rigglesford as Kingswood MD - that really focussed people's attention on the company's position within the wide-format space.

There's nothing like a competitor saying they're going to significantly increase their turnover in your market to make you sit up and take notice. That's exactly what Rigglesford did in his first couple of weeks in the new job, where he works hand in hand with Rob Long, previously Kingswood iOptus MD and now group MD. Their intention is to take the company's overall turnover from

£5m (for the year ending March 2017) to £7.5m in 12 months. At least £2m of that higher figure is expected to come from large-format arm Kingswood Display.

"We have always provided a large-format service, and had a couple of HPs, a Roland machine and Summa cutters at the Clifton Street site, but in the summer of 2016 we made the decision to move more specifically into that space," says Long. "Our central London location has always been a major USP of ours, servicing local clients - especially those in the legal market who require a quick turnaround service. However, that market is a consolidated one so we need to look elsewhere for growth and in 2016 made a determined decision to diversify and broaden our reach in large-format where we see real opportunity." Hence the Swanley investment, and Long's eagerness to take on Rigglesford and other ex-Clicks people - like its former production director Graham Leggett - when circumstances presented themselves.

"Alan knows the large-format industry very well and he gives us the confidence in our decision making in that arena," says Long, who eschews concerns in regards to Rigglesford's past re. the Clicks administration. "The way he's handled himself during all that only makes him more attractive!" enthuses Long.

Rigglesford, who is MD of the whole of Kingswood iOptus company, not just Kingswood Display, has brought in former colleague Leggett as chief operations director of the latter, where three former Clicks account handlers have also been recruited, along with former Clicks night manager Danny Horne, taking the number at the Swanley site to more than a dozen. But more expansion is planned.

"It's all happening very fast," says Rigglesford, who at the time of writing admitted that there was still free capacity within Kingswood Display. But he doesn't expect that to be the case for long, and further investment is expected in the coming months. "We have been running 24 hour working at Swanley since February 2017, and ad hoc weekends," he says, "and within 12-24 months we expect to have more kit and move to a bigger site."

The lease is up on the Kingswood iOptus premises in London in 2018, and both Long and Rigglesford say how those negotiations go will have a major impact of what happens at Swanley. "We will probably want to make sure we have a presence in central London, but it may make sense to bring more of the production together in a bigger factory out in Kent," says Rigglesford. "And of course, there's a lot resting on what happens in terms of large-format requirement too."

According to Rigglesford Kingswood Display will likely double its Vutek capacity within the next 18-24 months, or invest in some make of flatbed UV printer. "Textile and soft-signage is very much on our radar too," he says, adding "At the moment we sub it out but there's a natural route to doing that over time."

So what's the longer term plan? "We have no crystal ball, but we're keeping a close eye on the direction of the large-format market," Rigglesford says, pointing out that there is no real specific target sector in terms of its developing large-format customer base. "Existing Kingswood clients in the legal and banking sectors are asking for large-format and that's an easy sell," he says. "We won't do trade work, but we will do it for anyone else who asks us!" ●



# FLYING THE FLAG FOR UK MADE MATERIALS

**PERSPEX**  
Distribution Ltd



Choose from our unrivalled range of UK manufactured sheets for your sign and print projects - available today!

**PALIGHT PVC FOAM**  
Manufactured in County Durham

**PERSPEX® CAST ACRYLIC**  
Manufactured in Lancashire

**ALUPANEL ALUMINIUM COMPOSITE**  
Manufactured in Kent

**RIGID PVC**  
Manufactured in County Durham

**POLYCARBONATE**  
Manufactured in Doncaster

We believe in sourcing the best materials for our customers. We have built up an enviable range of UK sourced substrates delivering quality, consistency and availability for your projects.

**Blackburn** 01254 272800 sales.blackburn@perspex.co.uk |  
**Tamworth** 01827 263900 sales.tamworth@perspex.co.uk |

**Chelmsford** 01245 232800 sales.chelmsford@perspex.co.uk  
**Weybridge** 01932 356900 sales.weybridge@perspex.co.uk

**New Leeds Branch** 01134 677 800 sales.leeds@perspex.co.uk|

Visit [www.perspex.co.uk](http://www.perspex.co.uk) to view our full product range



## Oasis

Looking back ten years ago triggers very different images in my mind to what I see before me today." So says Simon Osborne, MD of Oasis Graphic.

One decade ago Oasis Graphic Co. was a third of its current size - just 10 employees, one JV3 and a 1200 wide plotter. Exhibitions was the company's focus market, accounting for 85% of its business. But as Osborne points out, "we realised we needed to have a hold in other markets too. We expanded into corporate interiors and have grown this side of our business ever since".

Osborne continues: "A decade ago the wide-format print industry was embracing UV printing in a big way. Direct-to-print meant reduction in costs and lead times halving. We jumped on board - responding to new technology was the only way to stay ahead of the game. Investing in technology has always been a priority for Oasis and we continue to prioritise it now.

"Oasis has centered around organic growth and that remains part of our character today. Our experienced team in both production and project management have honed their skills over time and grown with the company. This leaves us with a workforce rich in expertise and knowledge. Whilst we have talent that has been with us from the beginning we also encourage new talent to begin their growth with us, such as our new apprentice."

Osborne says that when it merged with Mustard Solutions "there was an element of stepping away from our grass roots growth and making a steep jump to the next level, but the acquisition wasn't any old acquisition. Former owner and MD of Mustard Solutions, Andy Hall, started life in the graphics industry at just 16 in the Oasis workshop. He flew the nest after learning the ropes and built a successful company of his own, and now we have welcomed him and his team back in to the Oasis family, and so our heritage lives on!"

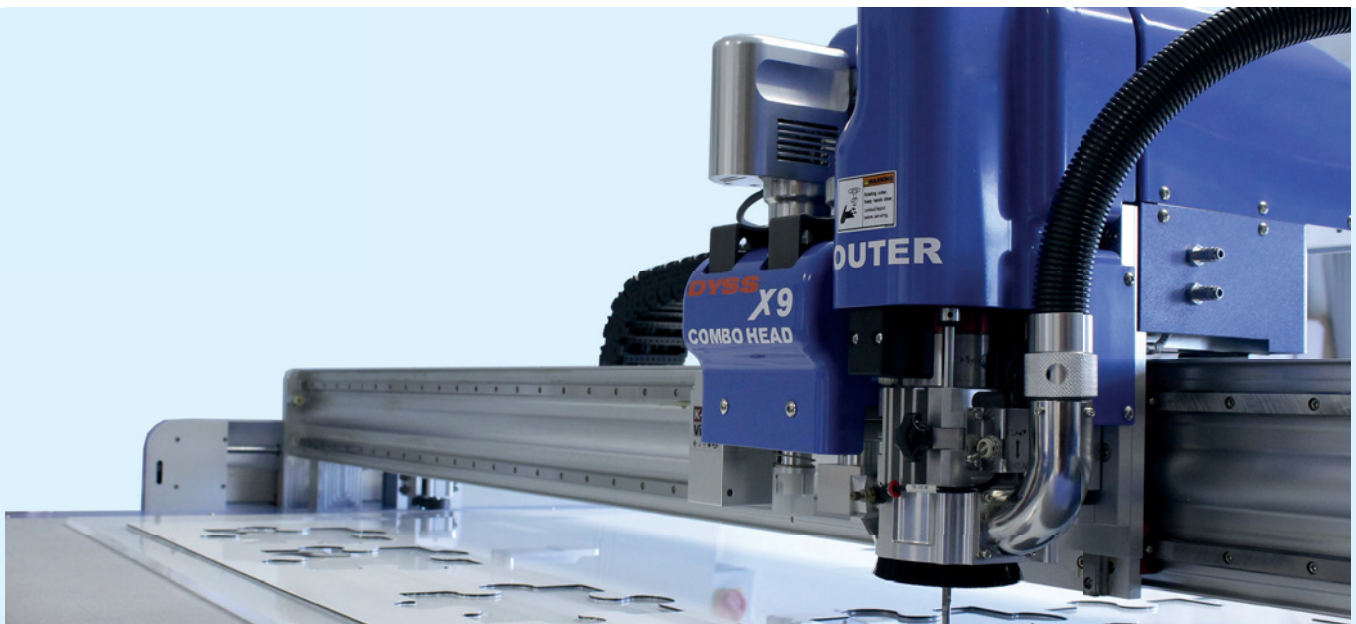
When it comes to what the large-format sector will look like in ten years, Osborne believes two areas will be at the forefront, adding: "I am happy to say we are responding to them both already.

"Firstly, expectations are rising for quality, innovation and efficiency. More of our clients are looking for full service providers where they can deal with one PM for all their needs and not have to look elsewhere for individual services. At the same time the demand for truly out of the box and creative solutions is rising. With crowded commercial market places, more sophisticated on- and offline marketing and high expectations from employees; all of our clients across all of our services are asking for innovative solutions in order to stand out. We have responded to this by creating an R&D department within Oasis. This team solely looks at new materials, testing their print quality and feasibility.

"We have also recently overhauled our own brand. This has meant working with one of our newest employees - our brand and marketing strategist - to take Oasis back to its bare bones. We needed to understand fully who we are and where we want to be and develop a brand identity accordingly. Unsurprisingly, our vision (to create premium quality graphics whilst embracing new technology and material innovations) relies on the heritage of where we have come from, (knowledge and experience).

"Secondly, I believe the pressure to be greener will be growing. Businesses are already being looked upon to reduce their carbon footprint wherever possible. There are ways in the print industry that we can be greener and we are working on this. I believe clients will factor in to their own CSR policies that they will outsource to green companies and therefore we have to respond accordingly. We have achieved our ISO accreditation for sustainability, which keeps us on our toes with regards to matters of a green nature."

Osborne ends: "We are very much looking forward to the next ten years. It is phenomenal to think that our business could diversify in the same way it has in the last ten years. I believe the true challenge for the future of Oasis is to be a leader in innovation and creativity, whilst maintaining our quality and customer service, which is paramount and always will be. ●



## Sign, Graphics and Display Companies Reap Benefits of DYSS Digital Cutters

A combination of superlative performance, high quality engineering and market beating prices have helped the DYSS X7 and X5 become the machines to reckon with in the digital cutter world. For 2017 AG/CAD has added the blisteringly quick DYSS X9 to the range.

UK sales of the DYSS X5 and X7 models, supplied by AG/CAD Limited, have continued apace in 2016 and now in 2017 across a variety of market sectors, including the Signs and Graphics industry.

The X9 has the same functionality and tooling as the X7 range, but with an innovative and revolutionary motion control system that gives ultimate power and performance, while retaining control and accuracy even on the finest detail.

Typically, high speed machines use rack and pinion drive systems and so will fall down on detail such as small radii; or they use belt drives which will often handle detail better, but struggle with lateral and vertical power. However the ground-breaking motion system on the X9 allows it to excel in both areas. If you don't want to compromise the X9 is the machine for you - ultrafast, powerful and fine control all in one impressive package.



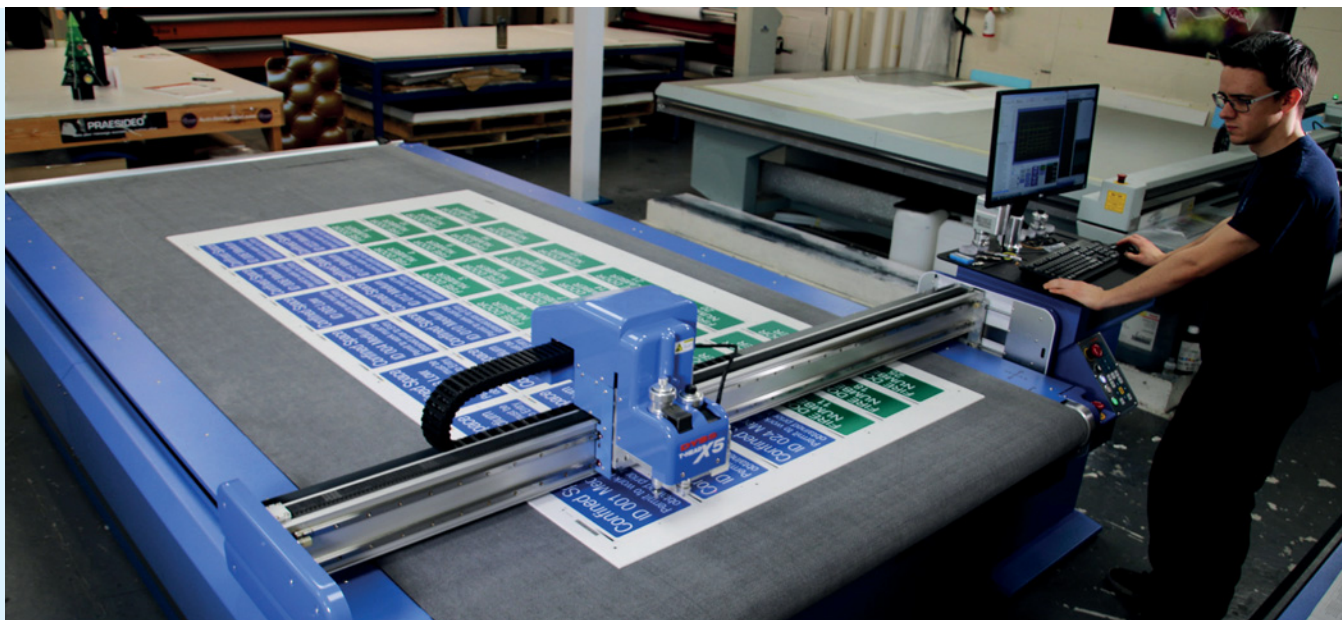
**PRINT FINISHING,  
SIGN AND  
DISPLAY  
COMPANIES ARE  
DISCOVERING  
WHAT A  
DIFFERENCE A  
DYSS CUTTER  
CAN MAKE TO  
LEAD TIMES  
AND THE RANGE  
OF BESPOKE  
PRODUCTS IT  
IS POSSIBLE  
TO OFFER.  
ULTIMATELY  
ADDING TO THE  
BOTTOM LINE.**

Just some of the Sign and Graphics customers enjoying the benefits of a DYSS:

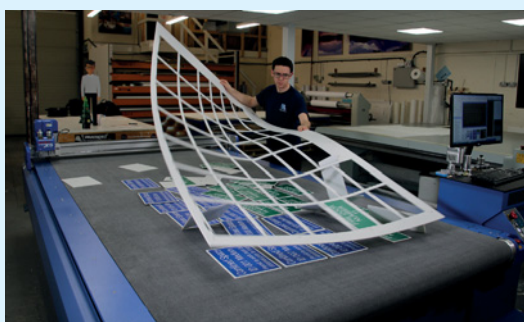
Anytech	Print
Augustus Martin,	Leach Print
Cardmasters,	Print2Media,
Creative Display Group	Projects & Print
Digital XL,	PS2 Print and Sign,
Eco Signs,	Pure Point of Sale,
Ethical Digital Solutions	Screenprint & Display,
Evolution Graphics,	Signs Display,
Find Signage,	Stand Innovations,
G4B	Sunshine Group UK
G4 Design and Print Solutions	Thames Graphics
Graphic Print & Sign	Thomas Dornan,
Impact Design and	Willow Graphics
	Windsor







## Print Finishing Diversity and Efficiency Wins with a DYSS



### G4B

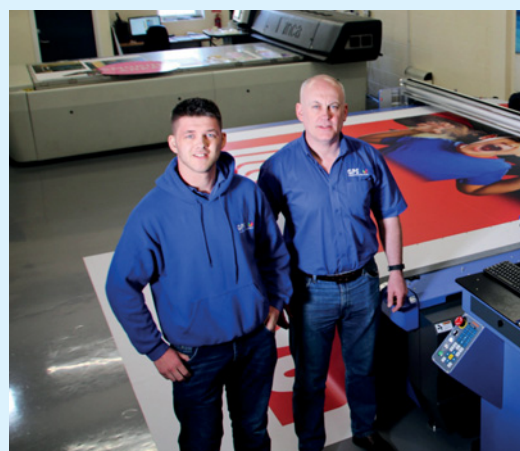
G4B formed in 2004 in Droitwich has continually evolved its services and equipment and now manufactures exhibition graphics, signage, pop-up systems and banner stands, vinyl, fabrication, PoS, fabric and flag production and much more. They invested in a DYSS X5 to eliminate a bottle neck in their process.

Commenting upon the situation, G4B Director Mr Hatfield says: "The industry has evolved considerably with customers continually demanding greater flexibility on both the print quantities and the substrates we print on. Compounding this was the cost reductions sought by customers. We bought an OCE Arizona XT flat bed printer four years ago and this meant we had three printers in operation. These machines all fed in to a bottleneck that was our manual hand-cutting operation. Added to this, the flatbed enabled us to print foamex, foam board, cardboard, Corex, PVC and much more. These materials brought greater challenges when conducting precision hand cutting. I used my time

**THE DYSS X5-1630C DIGITAL CUTTING TABLE FROM AG/CAD WAS THE ONLY FEASIBLE OPTION FOR OUR BUSINESS**

working from home to investigate the available options. The DYSS X5-1630C digital cutting table from AG/CAD was the only feasible option for our business."

G4B has estimated that the DYSS X5-1630 is so productive that it will pay for itself in little over a year. However, the real potential lies in the business opportunities that lie ahead. As Mr Hatfield says: "We can now generate complex forms and shapes with exceptional precision and speed. This has already enabled us to win new business producing short-run boxes for customers. So, one route we will explore further as a business is cardboard engineering. The KASEMAKE software from AG/CAD will help us explore this sector. KASEMAKE is like a traditional CAD package but with hundreds of built in resizable templates; it's easy to use, it's intuitive and it has endless possibilities. The only limitation will be our imagination."



## GRAPHIC PRINT & SIGN

When Malcolm Cairns was faced with the prospect of redundancy from his managerial position at a print company, the entrepreneur took the initiative by setting up a print business from his garage with nothing more than a printer, a laminator and guillotine. Wind forward six years and Graphic Print & Sign (GPS) has found its niche as one of the UK's few print specialists that can offer grand format as well as standard print and finishing services.

The Newcastle business has progressively invested in roll to roll inkjet and flatbed UV printers to deliver growth, but the biggest step for the fledgling company was the recent acquisition of a Mimaki 3.2m roll-to-roll UV printer and a complementing 3.2m wide DYSS X7-3220C digital cutter from AG/CAD.

To ensure the DYSS X7-3220C efficiently processes rolls with speed and precision, the gantry of the cutting table incorporates a series of equally spaced suction cups that clamp the bed and the respective substrate and move the roll in sequence with the machine bed. To retain perfect precision to within a tolerance of close to 1mm on lengthy banners, the DYSS X7 utilises the K-CUT Vision Pro System on the cutting head to locate printed reference points along the roll and then re-calibrate the cutting path in accordance with the marks.

Mr Cairns concludes, "Another key part of the system AG/CAD supplied is the KASEMAKE CAD software. From an early stage we appreciated its functionality, ease of use and its ability to integrate with common platforms such as Illustrator which helps to streamline our pre-press processes. The KASEMAKE 3D modelling feature even enables us to create 3D PDF files that give the customer an opportunity to review a virtual 3D prototype prior to production. This feature has already proven to be a competitive advantage when we are bidding for new business. We are winning the majority of enquiries and this can regularly be attributed to our skills with the KASEMAKE software."

## CREATIVE DISPLAY GROUP

When the Creative Display Group was looking for a new digital cutter, the cosmetic and beauty industry PoS display manufacturer didn't automatically chose the same vendor that supplied its previous two machines. As one of the UK's largest retail PoS and PoP printers, the Bradford based company did its due diligence and this resulted in the installation at its 30,000 sq ft premises of a DYSS X5-1630 and KASEMAKE software from AG/CAD.

**SINCE TAKING DELIVERY OF BOTH MACHINES, SUPER-WIDE WORK HAS RAPIDLY GROWN TO ACCOUNT FOR 20% OF OUR BUSINESS, OUR SUBCONTRACT COSTS HAVE FALLEN AND WE ARE CONTINUALLY WINNING NEW CUSTOMERS**



**WE'VE ONLY HAD THE DYSS ON-SITE FOR A FEW MONTHS, BUT IT HAS ALREADY MADE A HUGE DIFFERENCE. IT IS RUNNING 16 HOURS A DAY, TAKING CAPACITY FROM OUR PROTOTYPING AND PRODUCTION MACHINES AS WELL AS HANDLING THE LARGE FORMAT WORK**

As part of his research Managing Director, Mr John Charman, immediately recognised that the robust, high quality build of the DYSS was far superior to its competitors. However, the new addition wasn't bought purely upon its construction; productivity, precision, reliability and service were all also key factors in the decision.

With the fragrance and cosmetic industry representing over 40% of Creative Display's business, a typical production run for this kind of PoS display work is from 30 to 100 units, although runs sometimes exceed quantities of 500. This relatively low production volume is ideally suited to a digital cutter as the lower quantities often make it financially restrictive to add the cost and delay of procuring cutting formes into the equation. As Mr Charman continues: "We were spending anything from £2,000 to £3,000 per month on cutting formes and this has to be added to the cost of the work we were producing. By using the DYSS, we have eliminated this expense and reduced costs for our customer base. Furthermore, removing the reliance on cutting formes has improved throughput and workflow, significantly reducing our lead-times."

Cutting outgoings by up to £3,000 each month on die formes is just the start of the benefits of the new machine for the 36 employee company. The 3.2m by 1.6m cutting area on the DYSS has also given Creative Display the capacity to undertake large-format work. Previously outsourcing upwards of 10 to 15 large-format projects each month, Creative is now saving an additional £1,500 per month by bringing this type of work in-house. Again, having this capability internally has streamlined this process and reduced lead-times.

With reference to the quality of the work produced on the DYSS, Mr Charman says: "The DYSS is built on an extremely strong base and the speed and precision is giving our business big productivity and capacity benefits. The cutting head is much faster than the existing machines and it also generates a better cut quality and improved creasing. This is down to its ability to generate higher pressure on the creasing tools, and faster oscillating speeds with the knife tools, as well as better and more precise control of the movement of the machine during cutting operations, especially on detailed work."

*Call AG/CAD on 01606 863344 to arrange your demonstration and find out what a DYSS can do for your business.*



**IPEX**  
2017  
THE PRINT  
INDUSTRY'S  
EVENT  
PRINT IN ACTION

IPEX Design  
Challenge Finalist



**NEC, BIRMINGHAM**  
31st October - 3rd November 2017

**REGISTER NOW**

[www.ipex.org](http://www.ipex.org)

Abigail Bills - Birmingham City University



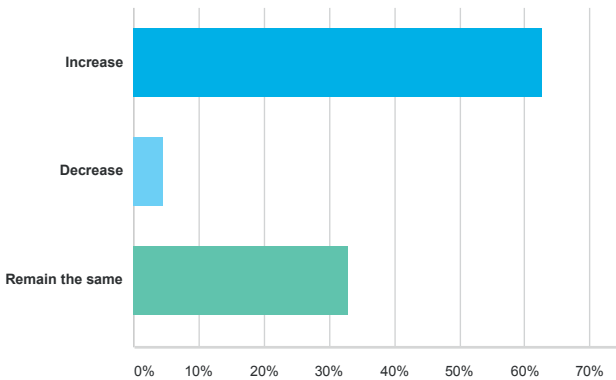
# Business is brisk

Stats from this year’s poll indicate a buoyant wide-format sector confident about its long-term future, but with short-term worries.

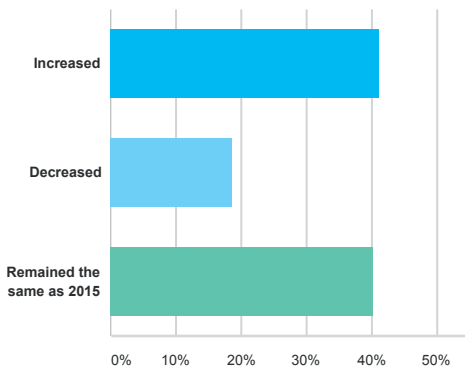
“Post-truth” was the word of 2016, according to the makers of the Oxford English Dictionary - and they should know. They defined post-truth as situations in which “facts are less influential in shaping opinion than appeals to emotion and personal belief.” Anything that challenged emotions or beliefs was often dismissed as “fake news”.

There is no need to generate fake news about the health of the UK’s wide-format printing sector.

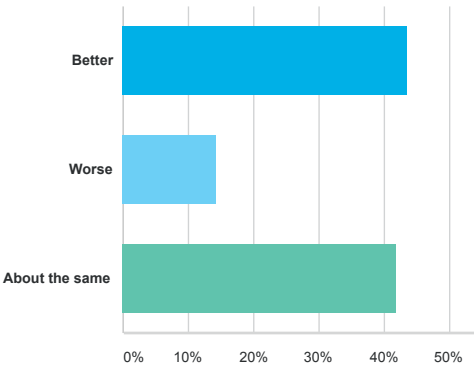
Q6 Do you expect your wide-format turnover ratio to change in the next 2 years?



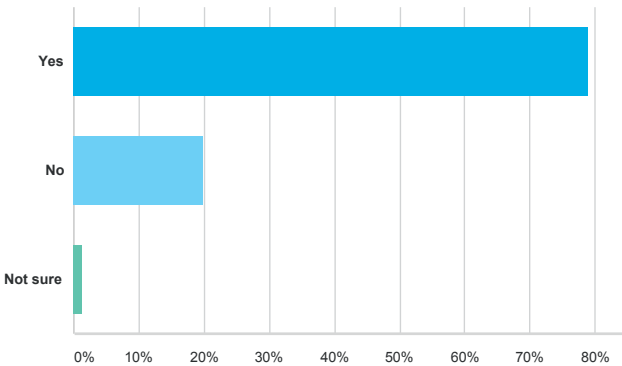
Q7 How did your wide-format profit margins change in 2016?



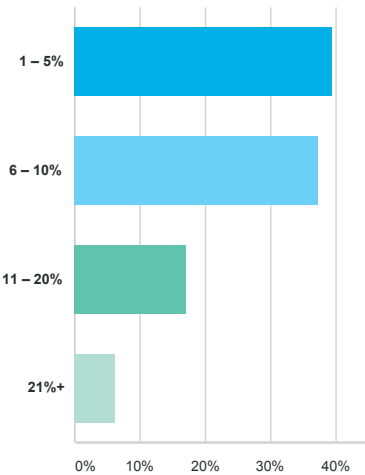
Q8 How do wide-format margins compare to other parts of your business?



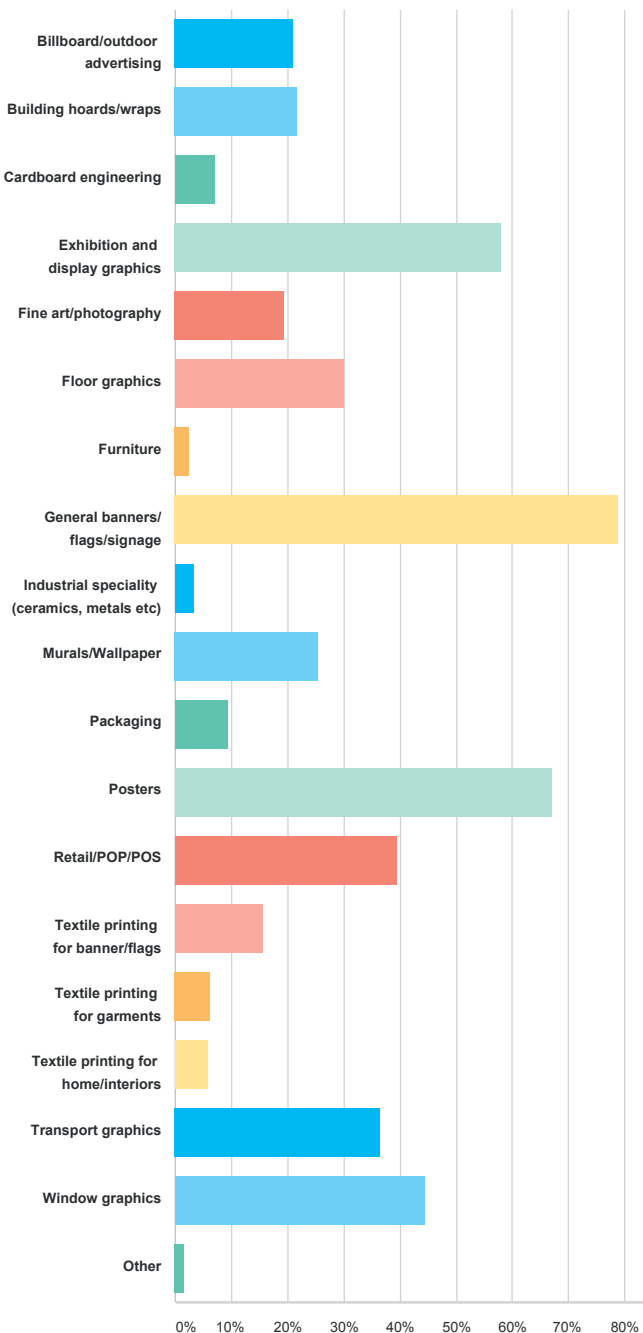
Q9 Do you expect your wide-format turnover to grow in 2017?



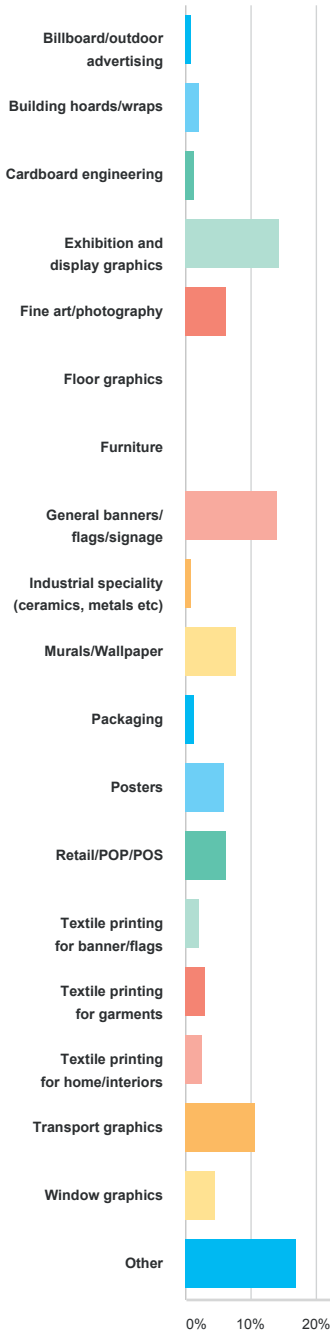
Q10 If yes, how much do you expect it to grow?



**Q11 What type of wide-format print are you currently involved in?**



**Q12 Which of these is the fastest growing within your wide-format operation?**



The facts - and the findings of the 2017 Widthwise survey - show that print service providers shrugged off a thoroughly dysfunctional year, in which Brexit and Donald Trump were merely the most dramatic in a series of wild card events - to remain quietly prosperous.

This feat is particularly impressive because the industry's customers - major retailers, ad

agencies, big brands, marketers - didn't have a great time in 2016. The headline figures for the service sector showed that, at best, the rate of return on investment rose slightly last year, whereas the ROI for manufacturers worsened. The latest Widthwise findings suggested that the wide-format sector expanded faster than the UK economy, which grew by 2% in 2016.

The good news is worth recapping: 41.15% of respondents said their margins had increased; 50.62% felt confident about their business's prospects; 79.01% expected wide-format sales to increase this year (and 23.32% of those expected that growth to be at least 11%) and three key sectors - exhibition and display graphics, general banners/flags/signage and transport graphics - look really promising.

The optimism about these sectors is particularly encouraging because so many printers operate in them: 79.01% said they are in general banners/flags/signage; 58.02% in exhibition and display graphics and 36.63% in transport graphics. The other popular markets are posters (67.08%), window graphics (44.44%) and retail/POP/POS (39.51%).

The top priorities for 2017 came out as turnover growth (33.64%) and improving margins (20.00%). The other three most popular goals are to find new customers (14.22%), build overseas trade (13.91%) and strengthen their company's brand (13.14%). The emphasis on overseas trade is intriguing - it has not been high on the industry's agenda in previous surveys - and it is tempting to ask whether Brexit has had an impact. Could the UK's forthcoming departure from the EU have awakened the industry's entrepreneurial zeal for export? Or do print service providers think that it is easier - and better - to win business overseas?

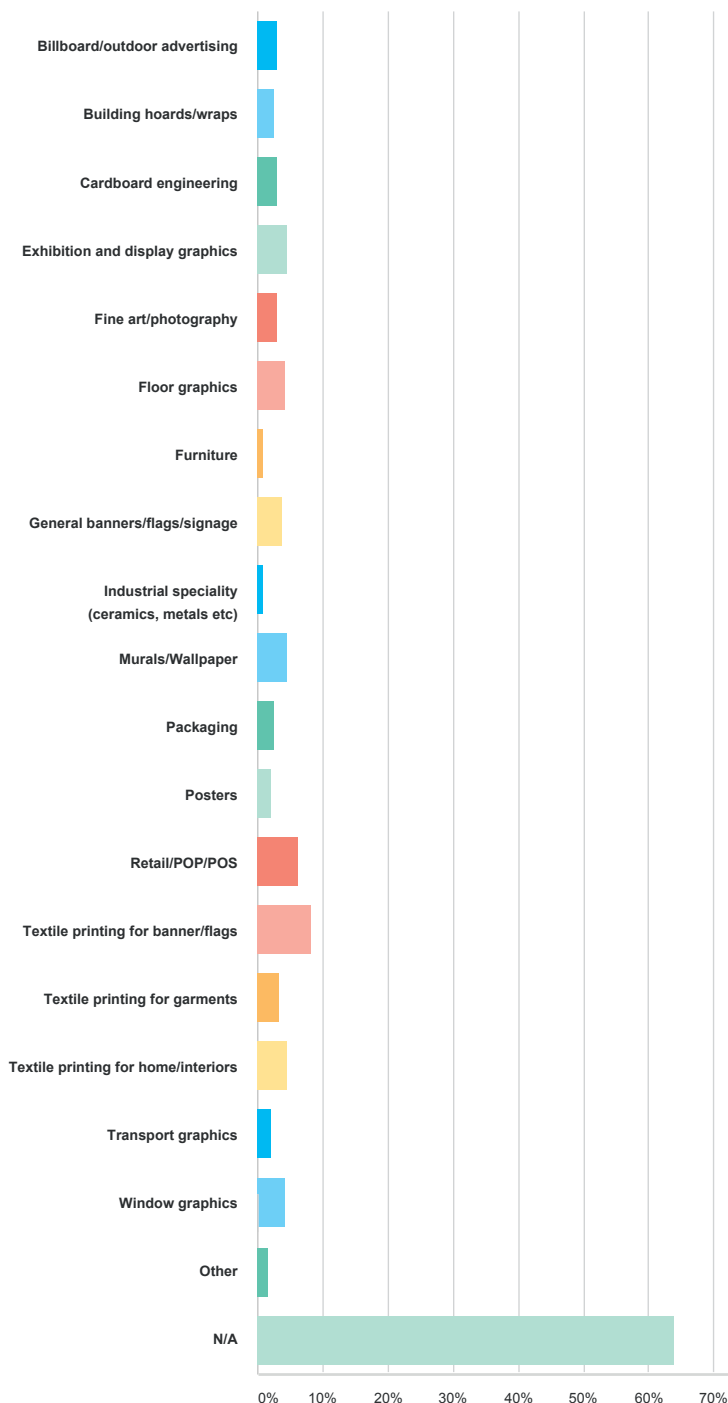
Researching new markets and realigning branding are the changes PSPs are most likely to make in 2017. One in six said they plan to collaborate with suppliers to identify and sell new applications to new markets, while 13.99% said they will spend more time on R&D and developing new applications for print.

Although some sceptics insist that it is hard for print service providers to make a return on investment by offering their own creative design services, this continues to be a popular strategy, with a whopping 48.97% of respondents planning to innovate in this area. The next most popular innovation - and on the agenda for 24.69% of those polled - is developing print installation services. These are two very different routes but the objective is the same: to help the PSP generate more value from each job and/or from each customer.

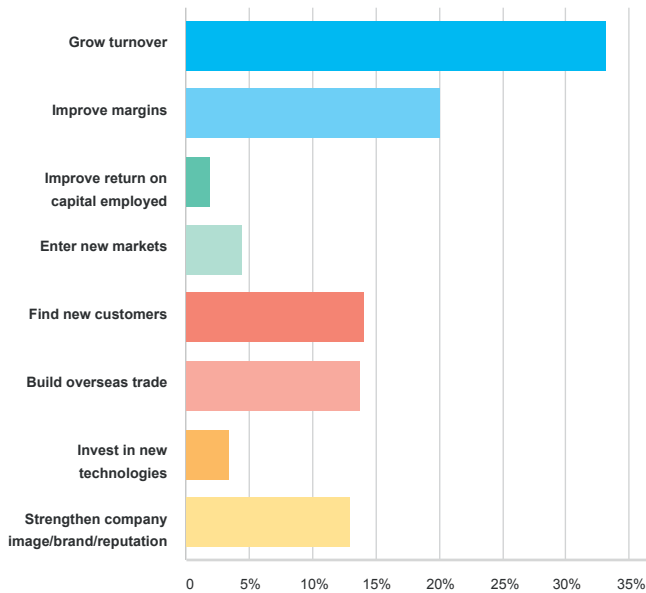
As good as this all sounds, wide-format printers do have some concerns. The great known unknown that is Brexit was cited as a worry for 51.8% of respondents, while 10.7% said they are anxious about the impact of Trump's presidency. Yet the main concern has nothing to do with politics - 59.26% said their biggest problem is the price of supplies.

This is of particular concern because 31.28% said they are worried about the price of printed products

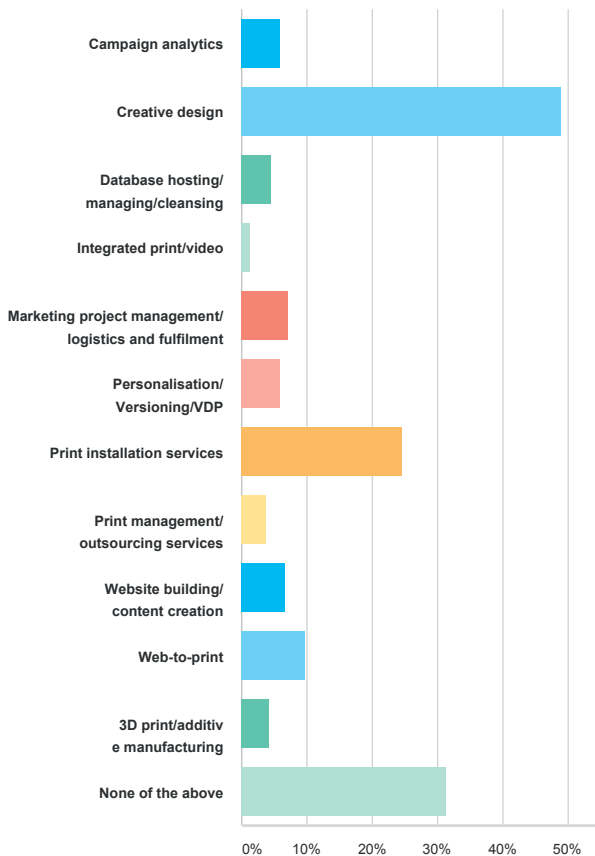
### Q13 Which of these wide-format markets will you move into over the next 2 years?



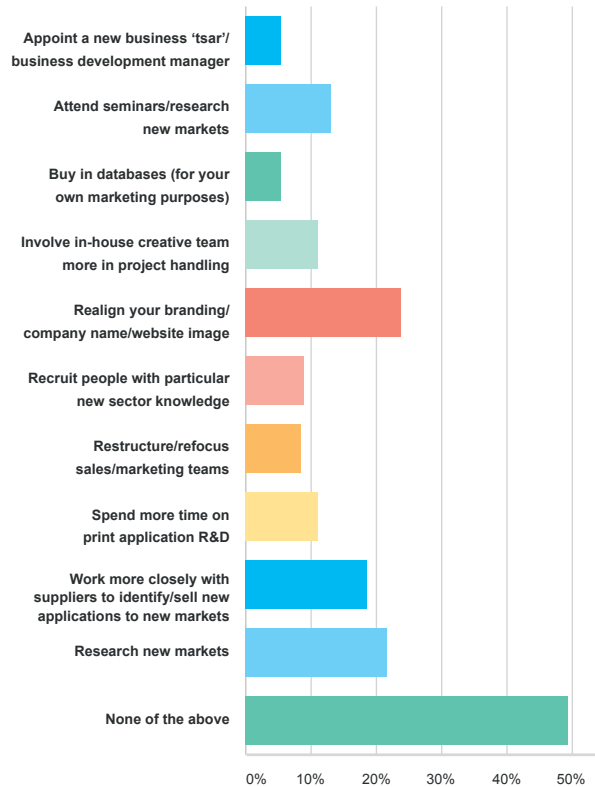
**Q14 What is your order of priorities for the next year? (graph indicates areas ranked top by respondents)**



**Q15 Do you plan to innovate/add services in any of the following areas within the next year to meet customer demand?**



**Q16 Have you made any of the following strategic changes within the last year?**



and 30.74% said they believe price remained their customers' top priority. Yet the survey also suggests that not all print buyers are primarily interested in cost per unit: 27.80% of printers said their clients are more focused on quality.

If you look at the markets served by the respondents, not much has changed since 2016 - and, with more than six out of ten not looking to move into new markets, there may not be much change in 2017 either. Outside the traditionally popular core markets identified earlier, billboard/outdoor advertising (20.99%), building hoards and wraps (21.81%), floor graphics (30.04%), murals/wallpaper (25.51%) and textile printing for banners/flags (15.64%) are the most popular sectors. Once again, other kinds of textile printing - for garments or homes and interiors - remain a minority interest, despite much hype in the industry about their enormous potential.

It may just be that, in good times, PSPs prefer to stick to what they know. This is perfectly understandable although there is an obvious risk that companies become complacent and miss out on opportunities for new business. In some cases, innovative print service providers do not set out to



diversify, they are just led by their customers into offering something different.

In the business press, there is a lot of talk about disruptive innovation. As pioneered by Uber and Airbnb, this means start-ups using technology to break into new markets and gain a significant competitive edge over established industry players with a completely different kind of business model. Although ride-hailing app Uber has had some well-publicised troubles of late, it is still valued, on the US stock market, as worth more than such long established corporate titans as General Motors and Ford. So the question PSPs need to ask themselves - and it is easier to do this while business is reasonably good - is: what could disrupt my business?

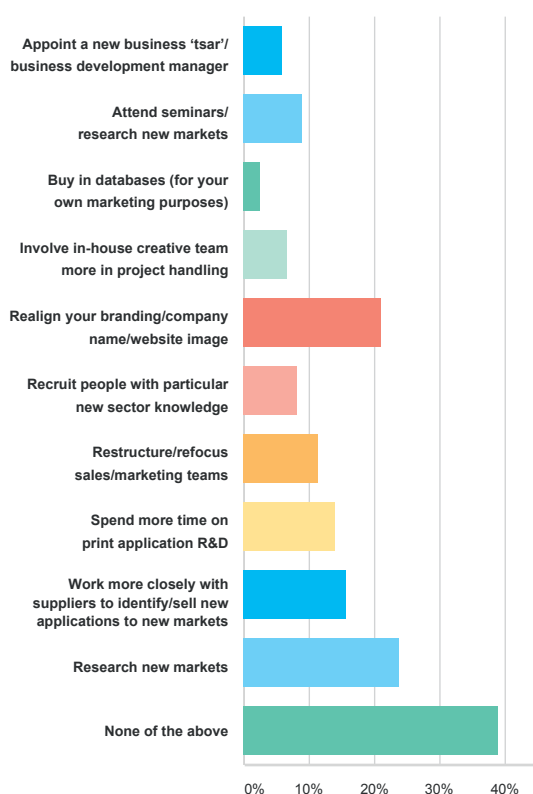
The worst case scenario is that asking the question leaves a company better prepared to

defend its turf. The best case scenario is that it turns that disruption into an opportunity it can exploit before anyone else does.

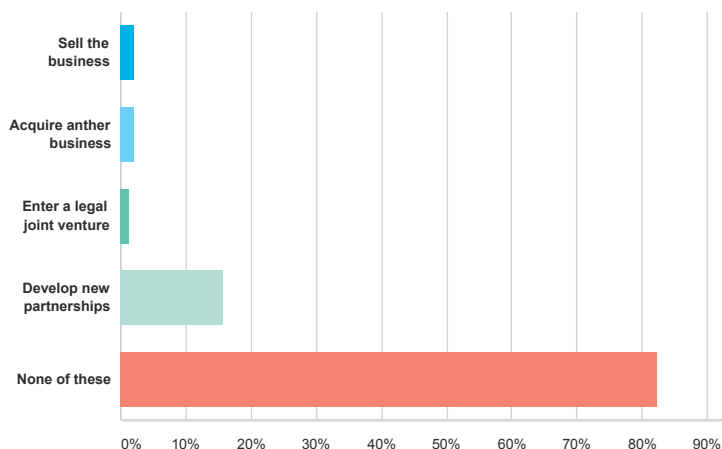
One of the new management theories to emerge in 2016 was the idea that it is more useful for business leaders to think of outcomes instead of markets. So, to take an obvious example, Apple's technology means it could play in any number of markets - from music to smartphones and possibly cars. This even applies to more traditional companies. You could argue that Ford is no longer in the car business it is in the business of getting people from A to B.

The rationale is that technology is reinventing so many industries that traditional demarcations are being abolished. This is truer in some markets than others but it could obviously apply to wide-format print too. Web-to-print and increasingly intelligent software means it takes significantly

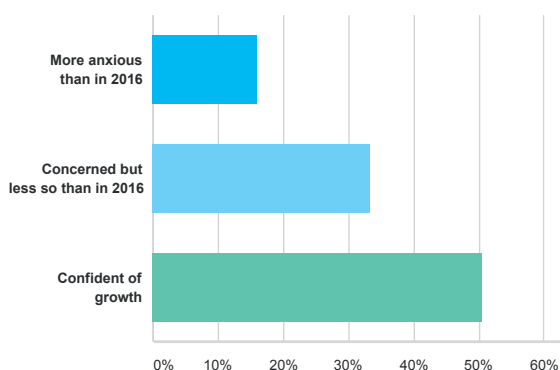
**Q17 Do you plan to make any of the following strategic changes in 2017?**



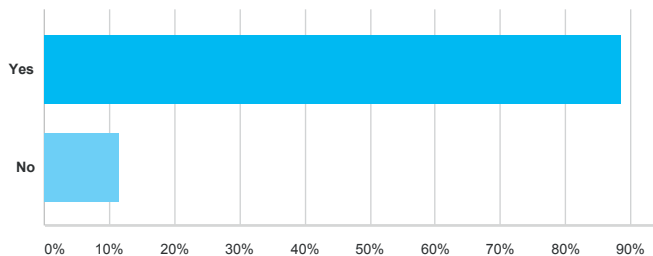
**Q18 In 2017 do you plan to do any of the following**



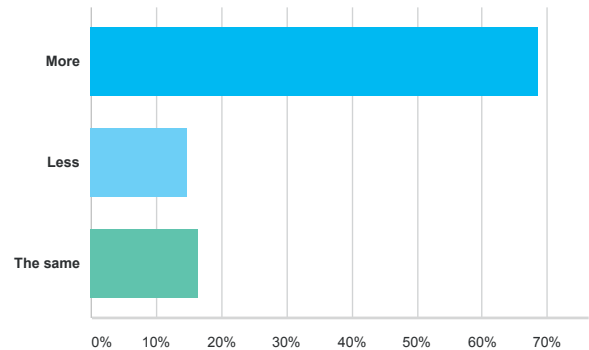
**Q19 How do you feel about your business's prospects?**



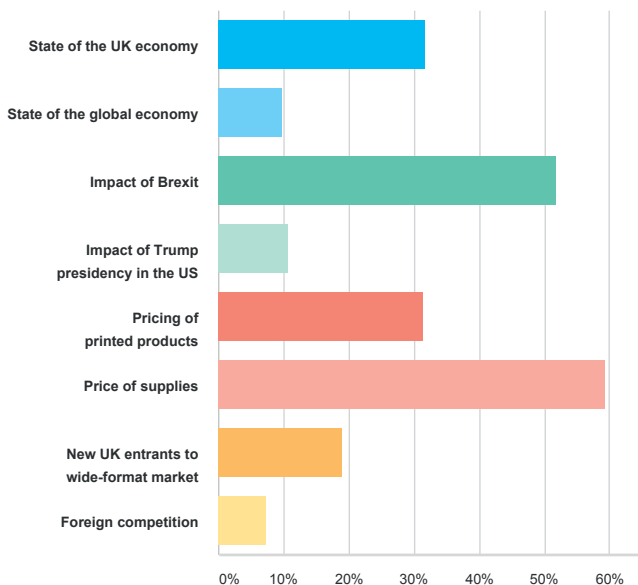
### Q20 In 10 years - by 2027 - do you think your company will still be involved in large-format digital inkjet print?



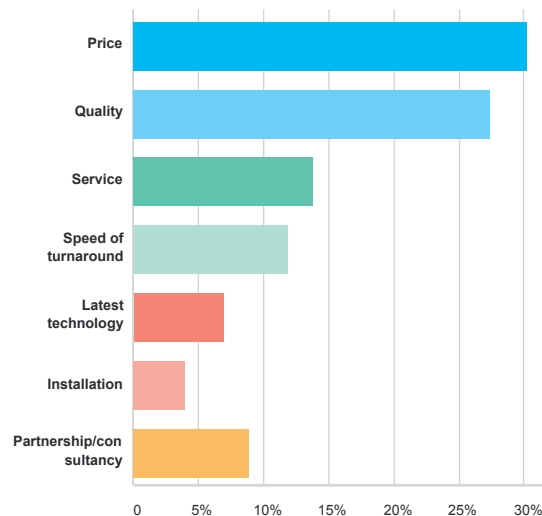
### Q21 Do you think it will make up a similar amount of your turnover?



### Q22 What are your biggest concerns for the business in 2017 and beyond?



### Q23 What do you think your clients' main priorities are? (graph indicates areas ranked top by respondents)



less knowledge to launch a new digital print business than it did a few years ago. Indeed, some of the sector's more dynamic businesses have been founded by people with no previous specialist experience.

So companies making signage could ask themselves if they are really in the marketing business, while wallpaper printers could start thinking they are in the homes and interiors business. A broader perspective might open up new opportunities.

While it would be stretching matters to say that British wide-format printers have never had it so good, they are in a good place. Savour that fact because Brexit is only the most obvious of the many uncertainties PSPs face in the next few years.

As recently as three years ago, many leaders in the digital print business felt resigned to their fate, believing that it was their sad destiny to be brushed aside by the internet. The technological triumphalism of the 'Dead Tree Media' brigade has since proved to be "fake news" and the industry's pessimistic mood has lifted.

In many ways, the most ringing endorsement of wide-format print was the fact that 88.45% of respondents to this poll were convinced that they will be still in the same business ten years from now. Given all that has changed in the past decade - and that we are only at the beginning of the digital technology revolution - this is an emphatic vote of confidence in the industry's future. ●

# Taking a wider view

In this article, Peter Mayhew, director of Lightwords, delves into the 2016 shipment data it has collected from a range of manufacturers, distributors and resellers as well as PSPs.

**2016** saw considerable change in the fortunes of many markets. Disruption is often cited as a primary reason for business success, but it can also be the main reason for failure, as well. So, when looking at the UK wide-format print market and its performance in 2016, we note that the many opportunities to change strategy and grow into a new market are certainly impacting many segments of our industry.

Firstly, let's look at the data we are considering. Lightwords' team of industry analysts is focused solely on digital imaging markets. We look at small-format document printers, consumer printers, copiers and all-in-one printers, wide-format printers, commercial printers, production printers and, the media and marking materials they consume. We want to know as much as possible about the life cycle of each product - including how many, when, where and most importantly why they are bought. To do this we use primary and secondary research methodologies to collect data from a wide range of sources across the industry, worldwide. Those sources can be manufacturers, distributors, resellers, service providers and end users of all types of printers.

For this project, we looked in detail at the 2016 shipment data from a range of manufacturers, distributors, resellers and PSP's in the UK. We supported this research with a series of one-to-one interviews with executives from all parts of the industry. We took nothing at face value, challenging everything.

Worldwide, the wide-format printing market is still chasing the holy grail of the conversion of analogue production of printed display to digitally produced output. Interestingly, the industry has already converted over 50% of all production to digital. And it's not just a story about screenprinting yielding to digital; it's also about the evolution of better, faster and cheaper digital print. Innovation is everywhere in this market.

In revenue terms, the UK market for wide-format digital hardware, supplies and break-fix services measured in terms of sales to PSPs grew in value to just over £600m in 2016. Let's dig into the detail by ink technology.

We'll start by looking at the Computer Aided Design (CAD) market. In the UK, the three primary vendors - HP, Canon and Epson - combined grew this market by around 3.3% in terms of unit shipments. Why the increase? Canon added many new innovative models, HP moved to add "rugged" printers capable of withstanding the harsh environments of the construction site and, Epson added support for thicker media used for displays in this market.

But it was not just new product and features which brought in sales from the architectural, engineering and construction (AEC) markets. Here older hardware no longer meets the requirements of architects, designers and engineers who need to be connected and productive "in-the-field" and, it is this need for connectivity that continues to drive demand.

Another sub segment of the CAD market is the graphical information systems (GIS) market. For the longest time, this segment was often overlooked and its printing needs considered irrelevant. However, as we move towards a data-driven and connected society directed by the Internet of Things (IoT), there is growing interest in geospatial analytics and mapping, especially where these applications exist within agriculture, natural resource, infrastructure, government and mining companies. In these environments large-format maps and charts are the common application. Geo marketing organisations can also be found taking an interest in large-format print, using mapped databases and analytics to solve logistics, HR and supply chain problems.

The aqueous graphics market in the UK saw some erosion of installations as units were either scrapped or replaced by a printer of another ink technology. However, the total number of wide-



**The UK market for wide-format digital hardware, supplies and break-fix services measured in terms of sales to PSPs grew in value to just over £600m in 2016**

format installations of all ink technologies in the UK and Ireland remained broadly flat at 50,000 units.

With sales of aqueous printers for CAD and textile applications growing while sales of printers for aqueous graphics are declining, we note that the mix of media consumed by this hardware is changing quickly. The core aqueous applications of portable and POS displays - which used to be aqueous strongholds for coated, photo and backlit media - lost market share as the market for aqueous inkjet compatible media grew overall by about 3m square metres.

Another interesting segment of the aqueous graphics market was for fine art products. Although this market, absorbed 400,000m<sup>2</sup> of wide-format media in 2016, it is as best "flat" and, there is little sign of change soon. We note that there is still a role for aqueous printed media in décor applications, especially high quality photo output used for wall artwork, which shows growth. Also, the introduction by Epson of its new Surecolor printers featuring violet and HDX inks to achieve the widest colour gamut and maximum black density, during 2016, helped to stimulate demand.

Aqueous based printers in our graphics market segment also includes the HP Pagewide products and, at the opposite extreme, the Durst WT250HS. Although the UK market has yet to see its first installation of the new Durst Water Technology, three of these printers have been installed by Durst across Europe into short run POP/POS display, short run packaging and rapid prototyping applications. Meanwhile, HP Pagewide printer products, aimed primarily at a range of graphics and growing CAD markets, are enjoying a steady rate of growth in the UK.

Businesses of all sizes appreciate the benefits of large graphics to communicate messages and Lightwords estimates that over two-thirds of in house reprographics departments in the UK now have some type of wide-format printing capability. The entry point for the in-house repro department is often an aqueous graphics printer bundled as a part of the upgrade for a fleet of copiers and

multi-functional printers under a managed print and services contract, which often includes media and ink supplies.

There has been a considerable amount of noise in the market about printed textiles and the wide range of products available to meet the growing market demand. Market growth in 2016 was not just driven by soft signage applications; new and refitted stores are increasingly upgrading light boxes to accommodate textile media stretched across a frame rather than a using an expensive backlit transparency. This approach saves shipping costs and reduces the heat in the box itself. We also saw the first signs of disruption in the established textile media supply chain as printers producing fabrics for home furnishings and garments have begun to appear at distribution locations closer than ever before to end user customers.

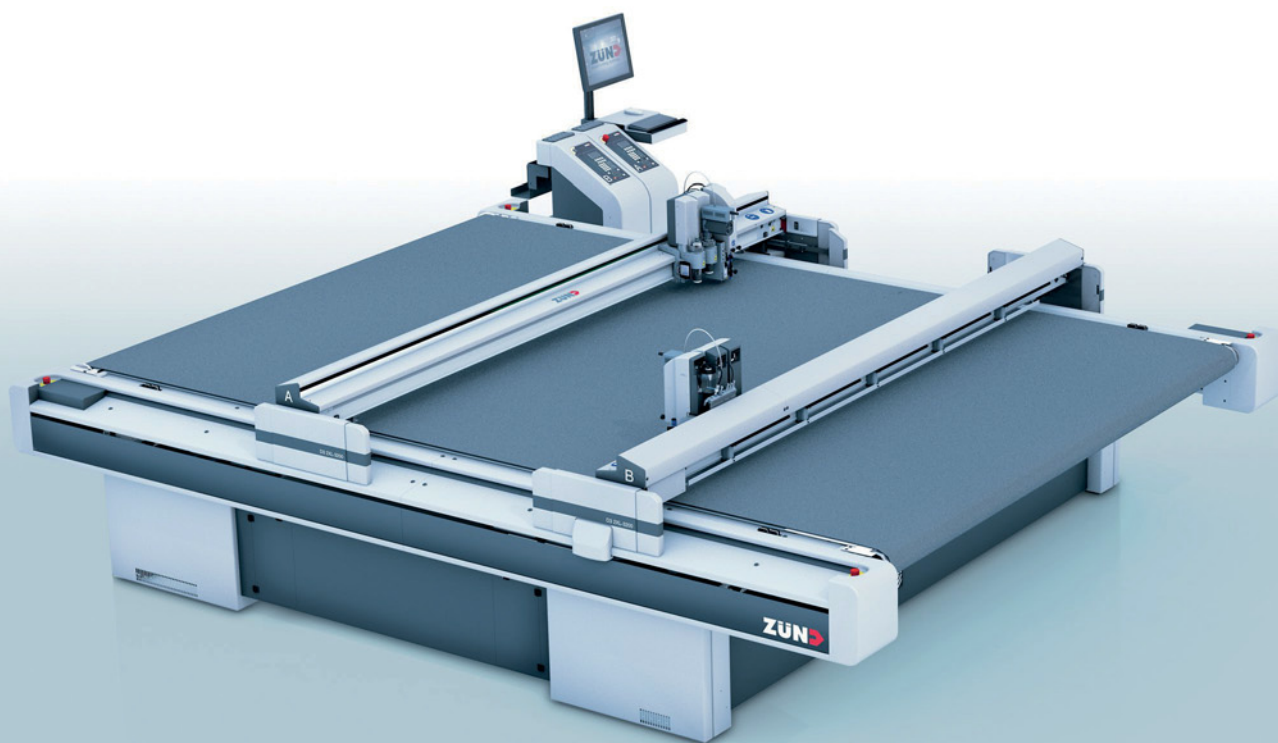
Textile printing grew substantially from 2015 to 2016, hitting over 37m square metres. Not surprisingly, it was transfer media for textile production which saw the most growth in the UK market. Digital aqueous ink revenues are also interesting with a value in 2016 of over £60m - of which ink for digital textile printing applications is a significant contributor.

When it comes to producing banners and printing onto self-adhesive media, there is a choice of ink technology available to the PSP. Eco and hard solvent, latex and UV curable inks will each produce a visually acceptable result for a wide range of applications. In this competitive landscape, we see ageing, hard solvent printers being decommissioned at an increasing rate and replaced by non-solvent technology. Those PSP's "addicted" to solvent continue to buy the eco-solvent argument with Epson more than any other vendor enjoying growing success in the UK market. Over 340 new solvent printers were installed in 2016 in the UK but, the number of installations is declining at a five-year compound annual growth rate of -5% across the EMEA region, and the UK is experiencing a similar trend.



Synonymous with engineering excellence, precision and reliability, the term "Swiss Made" embodies a concept of unparalleled performance.

**G3, S3 & D3** cutters from Zünd. Unparalleled.



Zünd **G3, S3 & D3** fully automated cutting and finishing systems, from the world market leader.

- ▶ Digital die-cutting, creasing and routing.
- ▶ Modular and future-proof design concept.
- ▶ A vast array of tooling for any application.
- ▶ Built to provide a working life of 20+ years.

Call us on **Tel 01727 833003** to arrange a demo, or visit our website at [www.zund.co.uk](http://www.zund.co.uk)

Zünd Plotting Systems Ltd  
Spring Valley Business Centre  
Porters Wood, St. Albans  
Hertfordshire, AL3 6PD  
**T: 01727 833003**  
F: 01727 833006  
[sales@zund.co.uk](mailto:sales@zund.co.uk)  
[www.zund.co.uk](http://www.zund.co.uk)

**ZÜND**  
swiss cutting systems



### Selected UK wide-format market focused companies

Company	14/15 Financial Year		15/16 Financial Year		% Change
	Accounting Year End	Turnover (£'s)	Accounting Year End	Turnover (£'s)	
SPANDEX LIMITED	4/30/2015	£35,800,000	4/30/2016	£40,895,000	12.5%
ART SYSTEMS HOLDINGS LIMITED	12/31/2014	£30,481,829	12/31/2015	£30,717,845	0.8%
METAMARK (UK) LIMITED	3/31/2015	£23,948,278	3/31/2016	£26,053,474	8.1%
PAPERGRAPHICS LIMITED	12/31/2014	£16,601,250	12/31/2015	£17,525,472	5.3%
PERFECT COLOURS LIMITED	8/31/2014	£15,363,982	8/31/2015	£18,252,151	15.8%
LITHO SUPPLIES (UK) LIMITED	12/31/2014	£14,690,559	12/31/2015	£17,528,445	16.2%
STANFORD MARSH LIMITED	1/31/2015	£14,195,236	1/31/2016	£14,542,440	2.4%
CWE SOLUTIONS LTD	12/31/2014	£14,112,116	12/31/2015	£11,716,375	-20.4%
HYBRID SERVICES LIMITED	31/09/2014	£13,520,130	31/09/2015	£15,263,860	11.4%
ALLPRINT SUPPLIES LIMITED	12/31/2014	£11,049,297	12/31/2015	£13,058,867	15.4%

©2017 Lightwords Ltd. [www.lightwordssimaging.com](http://www.lightwordssimaging.com)  
Source: [www.gov.uk/government/organisations/companies-house](http://www.gov.uk/government/organisations/companies-house)

Conversely, interest in Latex technology is strong and growing. HP is clearly dominating the UK Latex ink market, especially as the company aggressively extends the model range. We also note successes for Ricoh with its version of the Mimaki, latex ink technology. Ricoh offers an interesting white ink in its new inkset which improves drying and increases print speed. When bundled with a wide range of copiers, MFP's and commercial printers, Ricoh has a compelling offering for the commercial print service provider market. To further remove any doubt UK PSP's may have about Latex ink technology, we note that worldwide over 320m square metres of media were printed by latex printers in 2016. Much of this output is destined for POS applications although there is also a considerable amount finding its way into demanding outdoor and décor applications.

UK service providers seem to be buying UV curable printers at a similar pace to their Latex ink competitors as confidence grows in LED UV curing and entry prices fall. At the higher performance end of this market ROI calculations remain challenging but, we're seeing overall installations churn and grow, especially where faster production speed or workflow improves productivity. In 2016 alone, the UK market absorbed over 250 new UV curable wide format printers ending the year with the number of installations remarkably similar to those for Latex ink hardware.

No report on the UK would be complete without looking at the year on year performance of a selected range of key players in the UK wide-format market. It is interesting to note that many of the major suppliers in the UK wide-format market have achieved revenue growth over the full 12 months of trading. From a turnover perspective, our top ten players grew by a year on year average of 6.7%. Digging deeper into the data, many retained profits in their businesses.

The UK market for printers, media and ink not only met but exceeded our expectations for growth in 2016. While media sales contributed 60% of total suppliers' revenue in this market, ink and hardware sales also made significant contributions to overall growth. Other revenue came from software and finishing products, installation and break-fix charges.

Our view is that if we combine all of these revenue sources we would have a number in the multiple of billions of UK pounds. We are not convinced that the UK wide-format market will sustain this rate of growth indefinitely as the towns, cities, wide-format markets and applications can only absorb so much wide-format output but, we also do not expect see the UK market levelling out in 2017. ●

# Print & Cut vs Print-then-Cut – what's best for your business?

As with any industry, when it comes to picking what's best for your print business, it's not a one-size-fits-all situation. In a tight-knit industry like wide-format print, it can be easy to be swayed by what everyone else is doing. But if you want to stand out – rather than blend in – picking the option that makes your work, your business and your reputation shine is worth the extra bit of research.

The first thing to establish is what your business needs are; and whether your purchase should be an integrated Print & Cut device or a print then cut workflow. For a busy print shop, the tools you use to run your business – your machinery – needs to be as compatible as possible with your requirements to give you more opportunities for profit. And choosing the right machinery from the outset is a great way to kick start your business on the road to profitability.

There are a few key differences between Print & Cut and print then cut - including the obvious. With an integrated machine, you get smaller floorspace usage, whereas with a print then cut workflow you need the room for two or more machines; at minimum, a printer and a cutter. Beyond this though, there are differences between the two workflows that can provide your business with varying levels of efficiency – depending on what you're looking for.

In many circles, Roland DG are known for Print & Cut. Since 1995, we've continued to produce technology that's as efficient, profitable and easy to use. With over 116,000 installs of integrated Print & Cut technology worldwide, there's no doubt that it's a profitable solution for many print businesses. With models ranging from the desktop VersaSTUDIO BN-20 to the high production SOLJET PRO 4 XR-640, the versatility of digital wide-format printers available is larger than ever before.

And that word – versatility – is the key when it comes to Print & Cut technology. For a print business, a digital printer that can also cut means you're able to chop and change between different stickers, varying poster sizes and other print outputs with very little fuss, as and when your customers require it. This ability to be agile with your print production makes switching between jobs an easy task, especially in combination with compatible RIP software like VersaWorks Dual



that allows for multiple jobs in one run. And of course, you can't ignore the fact that space is an issue for all businesses. An integrated machine takes up half the space and leaves you extra room.

If, on occasion, you find yourself with more work on your hands than you can achieve in one day (not a bad problem to have!), Roland DG's Print & Cut devices can do that extra work on your behalf. Thanks to smart technology such as an intelligent take-up system and Roland DG's OnSupport for external monitoring, letting your machine do all the work for you whilst you take a lunch break or even go home for a good night's sleep is a possibility.

With so many positive elements to Print & Cut, you might be wondering why you'd ever go for any other option when it comes to producing output for your business. There's one word to describe the major advantage that print then cut can provide your business: Production. With a multi-machine workflow, you can easily customise your production levels to your businesses' requirements. A print then cut workflow means you can always keep up with what your customers throw at you.

If most of the work you're producing is likely to require lamination, print then cut might be the better solution for your business. Though more labour is involved in moving between machines, if you're already having to divide your work between a printer or printer/cutter and a laminator and then back, adding one more machine to the process doesn't add that much more work – and keeps your printer free for the next batch of work that comes in. With a print then cut workflow, every machine is doing its part at all times – saving you time and enabling the orders to keep pouring in.

Roland DG also offers differing levels of print-only machines and accompanying cutters, including the cost-efficient VersaEXPRESS RF-640 and the SOLJET EJ-640; designed with high-volume print in mind. In combination with the

CAMM-1 GR series, production wouldn't be an issue for your print shop. Of course, space is a consideration as well as cost when it comes to a print then cut workflow; but the rewards it can reap make it more than worth the square footage it uses.

What it all comes down to, in the end, is that it feels like the best fit for your business. There's a wealth of advice both online and at trade shows about all the workflows available – but this can also depend where you want to take your business in the future. Often the best thing to do is to follow your thoughts or ideas up with an in-person consultation, proper demo or even just a phone call. A clear idea of where you want to take your business, whether you want to specialise or offer a bit of everything, is a valuable asset when it comes to making the right choices for what kind of machinery you need.

Still undecided, or need a bit more information? We have a variety of informative boot camps including 1-2-1 sessions, or in-depth courses with the Roland DG Academy to help you; or if you'd like to get in contact for some advice on how to expand your business, drop us a line and we'd be happy to help. ●

Call us on: 01275 335540




**CAMM-1** GR series cutter

**CUTS MORE.  
CUTS FASTER.  
CUTS TOUGHER.**

DISCOVER THE GR CUTTER SERIES >

**NEW**





# Going for growth markets

There's so much noise about the growth of digital print markets in areas like textiles and packaging. But are large-format PSPs paying any attention to what they're hearing?

## About textiles

In conversation with  
**Magnus Mighall, MD, RA Smart**

Lots of figures are bandied about in terms of the potential of digitally printed textiles. Just recently in Image Reports we flagged that the latest data from Smithers Pira values the current digital textile printing global market at 1.17bn Euro and forecasts an annual average growth of 12.3% up to 2021, taking the market value up to 2.42bn Euro within five years. And yet textiles printed using digital processes only made up around 2.8% of overall volume in 2016, meaning a huge chunk of market share is still up for grabs.

No doubt there is plenty of potential - the arguments are well known and make sense - but that doesn't mean large-format digital print PSPs see it as their best option for growth. So are inkjet printer manufacturers and other interested parties rather overselling the opportunity to these operations, when really other people will make the biggest impact when it comes to garments and interiors etc.?

Given that RA Smart both prints textiles and sells textile print solutions I asked MD Magnus Mighall for his take on the issue:

**Magnus, let's look at the actual findings of the WW2017 survey results, which showed that when PSPs were asked what markets they were involved in at the start of the year, the response was:**

Textile printing - soft signage	15+%
Garments	6+%
Home/interiors	5+%

**So soft signage is making inroads, but it's still a slow uptake when it comes to interiors/garments. Why do you think that is - the technology, learning curve, different customer bases and easier ways to growth/profit?**

I think there is certainly room for growth for PSPs when it comes to textile printing, but we have to

be careful of what we mean by textile printing. The soft signage sector is probably one of the biggest areas of print onto textiles by PSPs, but in the bigger scope of things it is a very small percentage of what can be printed onto textile. Plainly, those who have traditionally done POS etc. have seen the opportunity there - or their customers have asked them to supply something with a printed textile. And the technology they need to produce that kind of work is relatively straightforward.

Dye-sublimation scares a lot of people, but it is actually the easiest method of getting a print onto a textile compared with the requirements of other sectors where there are more technical challenges. And there's still an awful lot of growth to be had in soft signage, so it's easy to see why PSPs would be nervous at getting involved in other printed textile sectors where they need more investment, technological know-how - and to find new customer-bases.

The headline figures we see are of course for the whole potential digitally printed textile market, and it's a big ask to expect a large-format PSP to suddenly be producing silk garments or high volumes of bedding or whatever. That's not a real opportunity for them. There are so many people already involved with the fashion and soft furnishings markets. In terms of the digital textile print systems we sell at RA Smart for instance, less than 20% are for soft signage. We are selling the bulk to those already established as printing in those other areas.

In terms of what we actually print here in-house at RA Smart we do zero soft signage. Our heritage is screenprint and the fashion market. When we got involved in digital print over 20 years ago - when the machines were so slow and so expensive - that was our natural customer base. Our turnover is about £3m from digital textile print now and fashion continues to be our core customer focus, along with home furnishings/household textiles.



RA Smart chief Magnus Mighall explains why he believes soft signage will remain the textile print focus for large-format PSPs



When it comes to soft signage, PSPs have had the chance for some time now to produce output using dye-sub or UV technology, without having to invest in true textile kit because you're looking at mainly polyester-based prints. Those with dye-sub will be able to produce a bit more in terms of range than those with the UV or latex and so on, but it's not meant a huge outlay or learning curve. And it's a relatively straightforward upsell to existing customers.

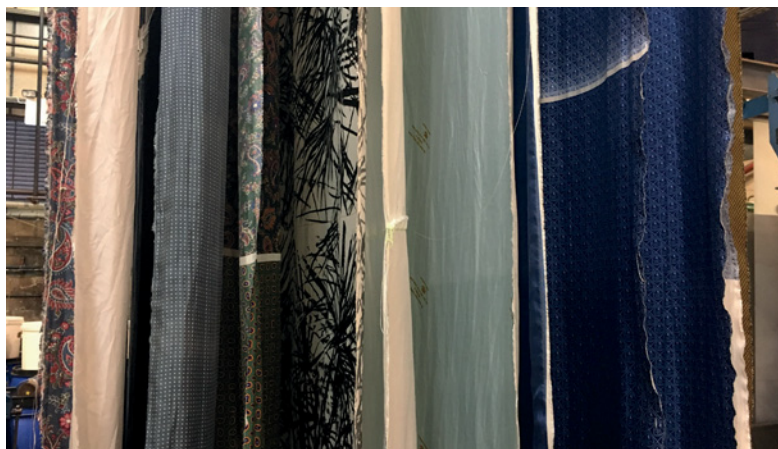
When you look at the garment, fashion and home furnishing sectors you are looking at different animals. You're going to want to print onto natural fabrics (though the High Street sector is primarily polyester!) and you're looking at industrial level printers using more complex ink chemistries etc. In truth it's a bit of a minefield and would involve investment in very specific kit, treated textiles etc., and research in getting product to market.

Here we treat all our materials etc. in-house, but it's not cheap to set up an operation like that. If you were looking at setting up a facility to print natural home furnishings or for fashion using reactive dyes and producing, say 2,000 - 4,000m a week, and giving yourself a chance at having some sort of vertical operation with pre-treatment, print, finishing etc., the investment would be a minimum of about £1m. Of course you could start on a very small scale and spend nearer £100,000, but then you probably wouldn't be significant enough to break into the market.

Looking at who buys digital print systems from us, you need to be aware that the garment market is very different from the fashion market. By garment people usually mean buying something like a ready-made T-shirt and putting a print on it - and that's pretty straightforward stuff and the kit investment is relatively low. But there's lots of competition already in that market.

What we would call direct-to-textile for fashion - printing on a roll of textile for the fashion industry to make up product afterwards - is a whole different thing. The systems we sell here tend to be to small fashion houses printing for their own label, or design houses wanting to sell their own textile design into the fashion sector, and people who were traditionally converters who have seen the benefit of bringing digital print in-house and having the versatility that gives them. Historically they might have used a print company, but not now - they want the control themselves.

It would be almost impossible quite frankly for a large-format PSP to break into those worlds because there's already such a strong set-up within them. If you're looking for where PSPs will find the biggest opportunity it really is the soft signage



sector, though there will undoubtedly be some crossover with other markets, especially when it comes to corporate branding etc. where a customer might say 'can you also do a whole load of window blinds too' or whatever.

**The poll asked PSPs 'what markets are currently growing fastest for you?' The data showed:**

Textile printing - soft signage	2+%
Garments	2+%
Home/interiors	2+%

**If they're not in it, they can't see fast growth - is that the message here, or is there more to it than that?**

It's probably a mixture of not being able to get growth from something you're not involved in of course, and the fact that there's easier growth still to be had from certain other large-format digital print markets at the end of the day. Saying that, I do think the opportunity - even just in soft signage - is massive. And it might be that just a small proportion of printers here in the UK grasp that chance.

**For those PSPs taking that chance, is it going to be as much about being clever in route to market as anything else then - setting up a B2C online business, or going into partnership with a retailer that has an in-store order facility for bespoke products or whatever?**

Totally. Retailers themselves are buying textile printers anyway, and I think we'll see more of them offering a customer service - blinds etc. - and handling production themselves. But there is scope still to get involved with the right partner - the blinds market itself is mammoth. If a PSP has the nous to go knocking on doors and saying 'this is how we can work with you' then I think there's huge scope. Interiors will certainly be easier than fashion where there's already a well established set-up and a lot of digital print already taking place - though not necessarily in the UK!

**Asked 'what markets will you move your business into in next two years?' - and bearing in mind that 65% of respondents said they wouldn't be moving into any new markets - what's your comment on the following findings:**

Textile printing - soft signage	8+%
Garments	3+%
Home/interiors	4+%

Well moving on from what I said before, it's not surprising that soft signage is the biggest focus. But I think that we're at a point too where upcoming technology could make it easier to produce for home/interiors markets.

We now have textile pigment inks that have been the Holy Grail of textile printing because they do away with the wet processing necessary with reactives. So, as with dye-sub, it becomes a much easier process, and we're now on the cusp of having the print qualities - colour depth, rub-fastness, wash-fastness etc - needed by certain sectors. And of course getting rid of all the wet processing also makes for a cheaper set-up, even sub £100,000.

There are also developments going on for allowing pigment inks to be used on substrates other than natural fabrics so the same system could also be used to produce soft signage - making it a multi-use technology investment - a one machine fits all scenario.

Right now it's about getting the coatings right for the polyesters to accept the inks and that is likely to happen sooner rather than later.

**When we asked about textile print kit investment, only 4+% said they already had a dedicated textile printer. But that looks set to change. Of the 41+% buying a new LF digital printer in next two years, 13+% said they would be buying a textile printer. Are PSPs still unsure and testing the water first with multiuse machines like latex for instance? It seems sensible if the focus is soft signage and substrates are not such an issue?**

It could be seen as a good thing or a bad thing that more people are printing textiles than have a dedicated textile printer! Great if it's a test the water situation and they can see how they can develop their offering and are thus looking to buy a dedicated machine. But also, they could be testing the water with an existing piece of kit, be getting awful results, and thinking 'mmm, this market is not for us' because of that.

I think people have been waiting for pigment inks and I think that will be the biggest impact on my selling textile systems over the next three years. I will be banging the drum with PSPs when it's proven to work on polyesters.



**So how do you think PSPs will have adapted to opportunities in textile print in, say, the next five years.**

I think dye-sub will continue to grow and it will make inroads into interiors as well as soft signage because there are some lovely polyesters now that mimic natural materials. But pigment inks will make the real difference.

In terms of what size of slice of the increasingly bigger digital printed textile pie will be taken by large-format PSP, I really don't know. I guess a lot depends on how brave they are and how clever they are in getting their foot in the door of these other sectors that have greater growth potential than soft signage. Saying that, I think there's still a lot more growth to come from the soft signage market anyway.

## About packaging

**In conversation with  
Nick Kirby, group chief executive,  
Swanline**

By 2021 Smithers Pira estimates that packaging will have become a routine application for the digital wide-format community. But Widthwise 2017 data shows that there's still a long way to go if that's to happen.

The argument is that the development of flatbed colour inkjet machines, tailored to handle a broad swathe of packaging-friendly substrates, will see the technology used to penetrate the valuable and growing packaging market, initially for corrugated and folding cartons.

Nick Kirby, CEO of the Swanline Group - the force behind, and speaker at, the Fespa UK Association's inaugural 'Digital Print for Corrugated Packaging Summit' last year - says it's a "natural extension of the traditional POS business". So I asked him why he thinks so few large-format PSPs are yet to go this route.

**As a trade supplier of both POS displays and printed packaging, what do you think about the numbers that came back from the Widthwise 2017 question: 'What markets are you involved in?'**

Cardboard engineering	7%
Packaging	9+%

Well, the packaging sector is full of opportunity, and if POS companies have large-format flatbed machines there is a real chance to deliver projects in this area. So I'm very much surprised by the numbers. I'm astounded that more aren't looking at certain markets available in the packaging sector

that have been traditionally services by box plants using analogue kit and saying 'do you know what, we can do that digitally'.

Overall, the opportunity to grow digital in the packaging sector is enormous, but there's an educational aspect to be taken into account which perhaps accounts for the slow move into the space. Packaging users (customers) are not that aware of digital applications and the possibilities open to them.

**But it seems that even that small number of large-format PSPs that are already involved in the space aren't seeing the levels of growth we've been told to expect. When we asked PSPs to identify where they were seeing the best growth, packaging/cardboard engineering hardly registered on the scale, with a tiny number putting it top.**

Cardboard engineering	1+%
-----------------------	-----

Packaging	1+%
-----------	-----

**Well-established sectors like display/exhibition graphics (14% and topping the chart of growth markets) and general banners/signage (almost 14%) were flagged up as still showing most growth. Are you surprised by that?**

I'm actually shocked. Swanline crosses over between POS and packaging. If you were to look at the growth

Swanline's Nick Kirby is astounded that more large-format PSPs aren't getting involved in packaging and cardboard engineering



# KASEMAKE 11

AG/CAD Limited has been rolling out its latest release of KASEMAKE software, Version 11, which adds even more functionality and features to an already impressive product.

## WHAT CAN IT DO FOR YOUR BUSINESS?

With hundreds of built in resizable templates for the POS/POP display market as well as for boxes, document folders and wallets, etc. the KASEMAKE software works like a virtual designer, giving your business instant access to a wealth of cardboard engineering know-how. In addition, KASEMAKE's 3D visualisation functionality is fantastic for mocking-up designs, exhibition stands, shop layouts, etc. The realistic 3D outputs allow you to present your ideas to clients rapidly and professionally, helping you to stay ahead of the competition while reducing your turnaround times and minimising mistakes.

There is no better design software on the market to help wide format print businesses improve their sales and service to their customers, maximise productivity and expand further into new, profitable market areas.

## BUILT IN PARAMETRIC STYLE LIBRARIES

KASEMAKE 11 includes over 700 configurable structural design templates that can reduce the "concept to cutting" time down to minutes rather than hours. New KASEMAKE 11 designs in the parametric styles library include freestanding units and options for constructing exhibition stands from structural design board. Utilising these resizable templates it is possible to produce a 3D PDF mock-up incredibly quickly and output the life-size structural cutting paths immediately to an artwork package to overlay graphics, for optimum workflow. Once printed, the job can be cut immediately on a digital cutter, such as a DYSS X7, using the same cutting paths.

## KASELINX SCHEDULER

Powerful job scheduling tools are provided with the latest KASEMAKE software to enable management, sales and admin staff, as well as designers to view and track jobs from enquiry through to production. A highly visual planner known as the Scheduler shows the status of jobs as they progress so that anyone in your business with access to the scheduler timeline can see all work at a glance. Further optional functionality allows enhanced connectivity with your business management systems. Abaca and Tharstern systems for example can already communicate with KASEMAKE 11 via this optional connection module.

## In3D

This powerful 3D environment visualisation and animation tool allows you to build virtual 3D environments such as a supermarket aisle, shelf unit, or even a complete store and then place your products into this 3D space. The software also allows for mocking up and visualisation of exhibition stands, signage and shop-fitting projects. Animations can be exported in MP4 movie



format, designed to work on both desktop and mobile devices, and In3D Version 11 even has the ability to export an animated 3D PDF.

## ENHANCED DRAWING IMPORT TOOLS

Customers will often provide you with their own artwork and cut paths to produce for them. This is where KASEMAKE 11 excels, with specialised tools for importing and cleaning up files that have been generated in graphics packages such as Adobe Illustrator.

## MULTIPLE REGISTRATION MARK CAPABILITY

Using multiple registration marks means that KASEMAKE 11 can adjust cut paths to take into account rotation, stretch and skew to ensure the paths accurately follow any level of distortion.

## POCKETING TOOLS

Ideal for signmakers, KASEMAKE 11 has new functions designed for use with a router-equipped cutting machine such as the DYSS X7, to mill out flat areas in materials, for example when inseting/engraving large text into a panel.

## TRAINING AND SUPPORT

You can always call AG/CAD to speak directly to one of the support team who are equipped with the latest remote "dial in" technology to assist you with any query. AG/CAD employs experts from the industry and can put together appropriate one-to-one training packages for beginners through to seasoned designers.

## THE FUTURE

Work is already well underway on the next version, KASEMAKE 12, which will bring, amongst other things, impressive new functionality to handle multi-part designs, perfect for wide format printers working on larger projects which are often made up of many separate items. ●

in our business, cardboard engineering is growing at more than 10% per annum - probably more like 15%. Corrugated packaging is growing at a similar kind of pace for us.

**We asked 'What markets will you move into in the next two years?' The response was:**

**Cardboard engineering** 2+%

**Packaging** 2+%

**Again, we're talking very small numbers, so should we take it that the cardboard engineering/packaging opportunity has been over-inflated when it comes to large-format PSP participation?**

For me, this highlights the disconnect between the POS and packaging sectors. POS PSPs with flatbed technology could transfer its use to packaging. The actual disciplines are the same but they need a change of focus, and perhaps find a new set of customers.

The reticent is maybe that packaging also carries different requirements to those they're used to. POS tends to be, you make something and deliver. With packaging you tend to make it, stock it, filter it in. And then you have different buying departments. With POS the buyer tends to be marketing led and the product is quite creative and the PSP works in close collaboration. With packaging there are standard styles and a buyer will go off and buy it from any one of 20 companies that can make it.

You need to think about materials too - there's a whole raft of packaging substrates that many POS companies won't have worked with before. And then there's the ancillary machinery to think about, like die cutting, speciality gluers etc. So there is a new learning curve.

**Asked 'What is your order of priorities for the next year?' and asked to rank eight options, PSPs put growing turnover top, then improving margins. Entering new markets was put top by just 4.4%.**

**Are large-format PSPs missing a trick by not diversifying into areas yet to see mass migration by their competition, or are they being sensible?**

If you have the equipment to handle new applications why wouldn't you diversify to fully utilise that equipment? If a piece of equipment can print everything from a piece of wood to a piece of carpet why wouldn't you do that to leverage the asset? I don't get it! Anything we can print on here, we'll print on.

**So what prompted Swanline to make the leap into packaging then?**

Swanline started as a POS company, screenprinting, in 2001. Screenprint is actually still a big part of



our business, especially for corrugated packaging, which is where the crossover started. We brought in laminating to corrugated, and litho, which gave us the opportunity to grow the packaging side quicker than the POS side, then along came digital! We did not put in our first digital machine in until 2013 - the world's first HDR machine from HP - and that really changed the dynamics of our business and put a focus back on POS. Now we're about 50/50 POS/packaging, the latter in the main being still analogue though we are using our digital machines (2 x HP FB11000s) for short-run packaging, typically up to 1,000 sheets. For multi-pass machines that is the sweet spot.

Upcoming single-pass technology will encroach on markets supplied by higher volume analogue flexo and offset litho operations and take those numbers up to 15,000+. We are actually committed to getting a single-pass machine in 2018.

But, if you're going to use a single-pass machine, it needs to be water-based - UV is no good because so much packaging ends up being used for foodstuffs. Even if kit manufacturers say they have water-based inks, that's no good if the curing is UV! We shouldn't get drawn into believing that the technology is quite there - yet.

**Do you think the responses from large-format PSPs will be much different in five or ten years' time?**

Yes, totally. As I said, I think there is massive opportunity in packaging for POS PSPs, and people will become more educated about the possibilities. Hopefully there'll be more discussion and less disconnect between those in POS and those in packaging by then.

If you look at the likes of Fespa - which in the main represent the interests of POS companies - and organisations in packaging, they've never heard of each other! There needs to be more collaboration so that the opportunities are realised. Unless all parties understand what is possible it's going to a slow shift for the POS sector into packaging. ●

# Unwilling to run the risk

When it comes to technology and investment, never have the words ‘cautious optimism’ resounded so strongly.

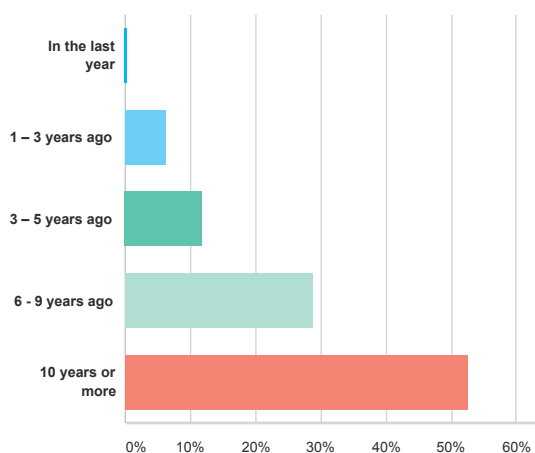
**W**ide-format print is driven by technology, but technology is not an end itself. If print service providers invest - and this year, according to the 2017 Widthwise survey, that is a significant ‘if’ - they do so in pursuit of business goals. For some, the rationale for investing may be as simple as replacing a machine that is broken, worn out or deeply uncompetitive. For others, the spend may be the first step in a strategy to transform the company either in size or in terms of the customers and markets it serves. For many, the motive may be an amalgam of things: confidence that new capacity can be sold, belief that a new printer could reduce unit costs, an opportunistic response to a particular situation (for example, the sudden availability of a long desired bit of kit at a knock down price) or a sense that it is better to invest while times are good.

Many print service providers will have a technological vision that, although flexible enough to be revised, corrected or even discarded, is aligned to the business plan and gives the business’s leaders a clear sense of future direction. This vision could be grandiose - a road map to the high tech paradise of Print 4.0 where everything is automated, digitised and networked - or more down to earth, a mapping of the technologies that are likely to benefit their business in the next year or two.

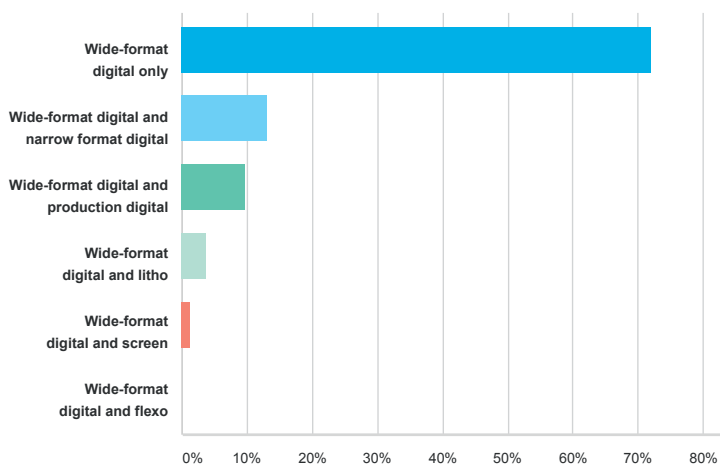
This kind of vision can also help them to remember that leading edge technology is often not as useful as best fit. The technology a wide-format printer really needs is not necessarily hot off a stand at a showcase such as Fespa or Drupa. The most appropriate solution may have been in the market for several years - and should also, therefore, have had any bugs and flaws ironed out. Consistently being first with technology can pay off but it’s a risky strategy, especially if your company’s technical resources are limited. For printers looking to diversify their business - which many are, albeit to wildly varying degrees - tried and trusted is a much safer bet than state of the art.

The British wide-format printing industry is an incredibly diverse sector. At one extreme, you find long established one-man sign shops, with a wide-

**Q24 When did your company buy its first wide-format digital printer?**

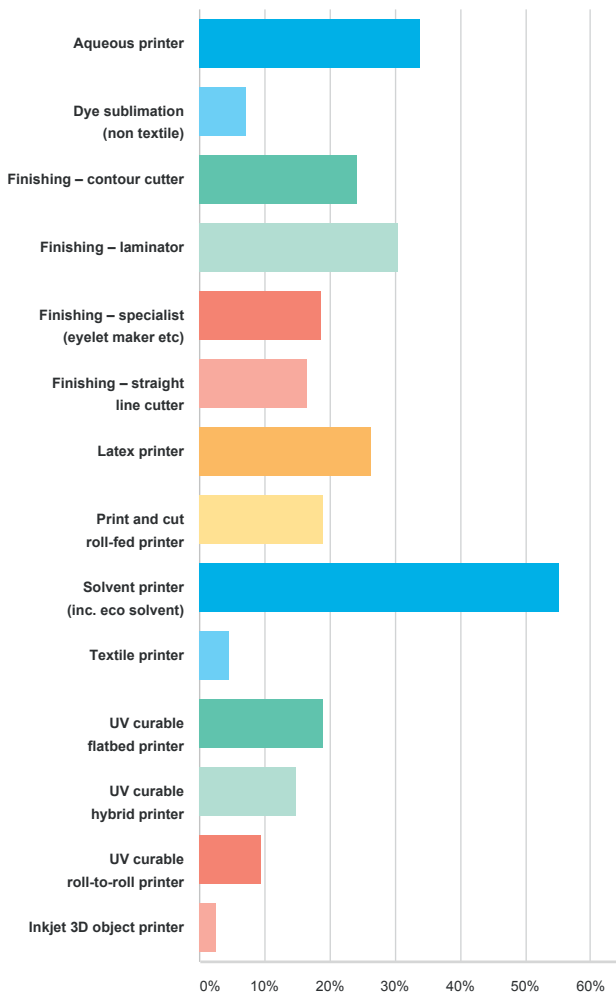


**Q25 What types of printer do you own**





**Q26 What type of wide-format equipment do you own?**

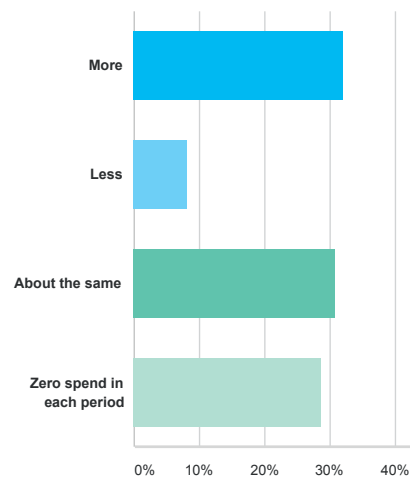


format roll-to-roll solvent printer and a laminator. At the other, you find a company as large as Cestrian, with a formidable army of machines, serving a variety of applications from window graphics to variable data print and ambient fabric systems.

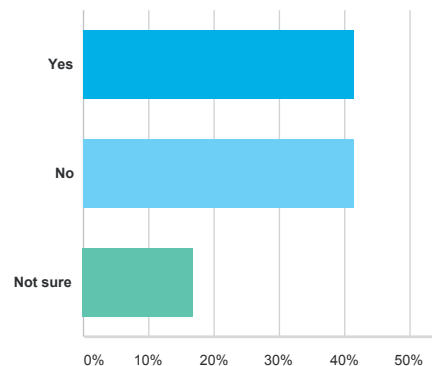
Business strategies are just as varied: some companies, such as Displayway, have developed profitable specialist niches where the complexity of the work deters rivals. Others, such as Callprint, generate more value from customers by managing whole projects for them. For many, print is still sold - and bought - as a commodity, and price is the determining factor. In recent years, commercial printers have sought easy profits in the sector although this threat has not been as great as many of the PSPs already competing here feared.

A few businesses have used technology to give them a competitive edge, notably Matic Media

**Q27 How are you expecting to invest in new equipment/products across your business in 2017 compared to 2016?**



**Q28 Do you expect to buy a new digital wide-format printer in the next 2 years?**

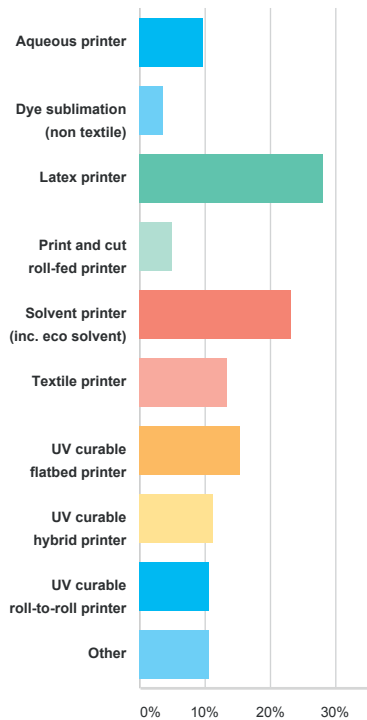


which has invented a process that outsources much of the hassle in print ordering back to the customer as it seeks to move to a low touch model where as much of its workflow is automated as possible.

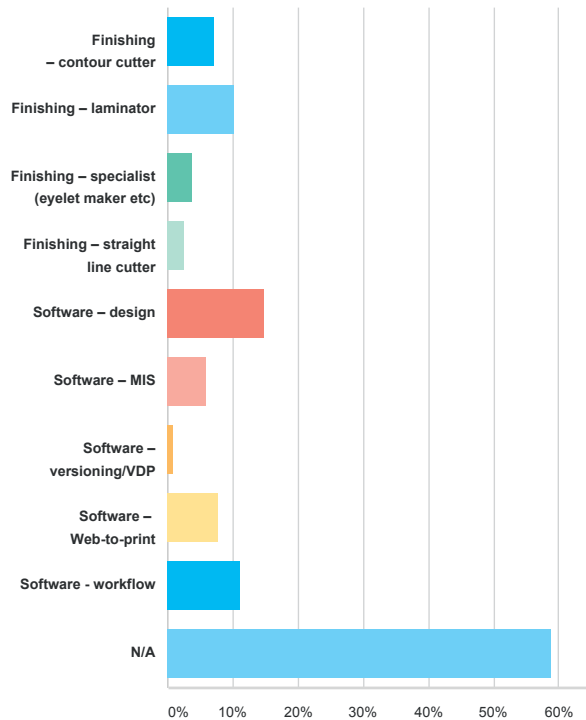
Seen in that context, the wide-format print's approach to technology, as revealed by the 2017 Widthwise survey, seems surprisingly uniform. There is also a significant disconnect between the kind of technology that suppliers are launching and making much noise about - as they encourage their customers to move into such markets as textiles, home decoration, industrial print or packaging - and what printers own or say they are going to invest in.

Unsurprisingly, the most commonly installed press in the UK wide-format print sector is, the survey suggests, a solvent printer - 55.14% of those

**Q29 If yes, which type of digital wide-format printer do you expect to buy?**



**Q30 Do you expect to invest in any of the following for wide-format in the next 2 years?**

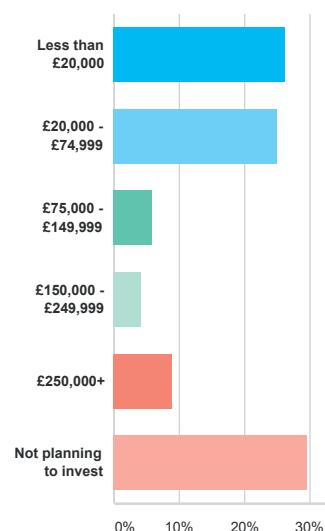


polled own one. Just over one in three own an aqueous printer, while 26.34% run a latex printer, an encouraging finding for HP! UV remains stubbornly popular: 18.93% have a UV curable flatbed machine, 14.81% a UV curable hybrid printer and 9.47% a UC curable roll-to-roll printer. A pioneering 2.47% have invested in an inkjet 3D object printer.

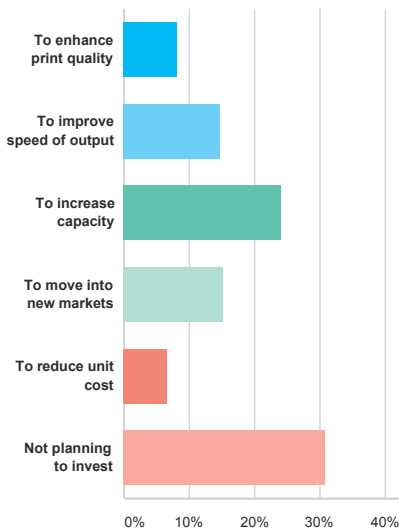
Specialist textile printers appeal to a small minority - still only 4.53% own one although 13.38% of investing companies believe they will acquire one in the next two years. This may be due to the fact that PSPs, sceptical about the market opportunity in textiles - or worried about the effort it will take to reach relevant customers beyond soft signage - prefer to invest in latex technology to test the textiles market rather than a dedicated machine. Certainly interest in latex is high - 28.17% of firms that plan to invest in a new printer say they will buy one. Despite environmental concerns, 23.24% of investing companies intend to purchase a solvent printer, while 15.49% plan to acquire a UV curable flatbed printer. Note: only about one in eight say they will invest in a narrow-format machine to expand their 'solutions' offering.

Although business seems good and those

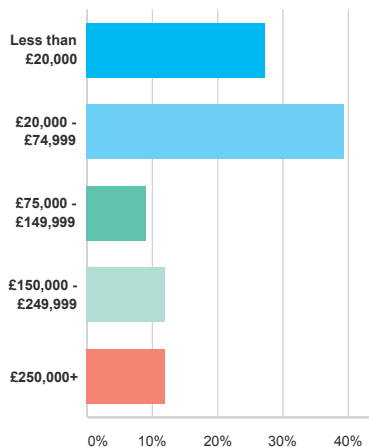
**Q31 In total, how much do you expect to invest in the wide-format technology over the next 2 years?**



### Q32 What is the rationale behind your planned investment technology?

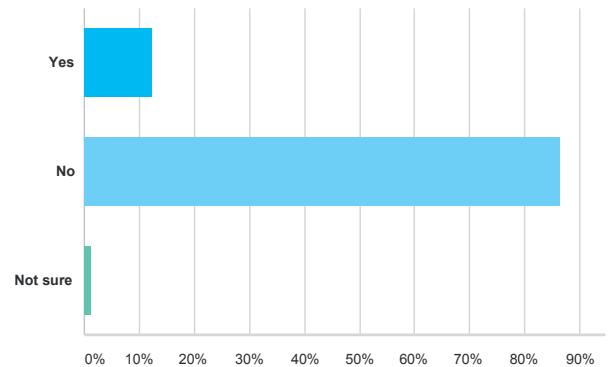


### Q34 If yes, in total, how much do you expect to invest the narrow format/production digital print processes over the next 2 years?



printers surveyed have expressed reasonable confidence in the future, their investment plans are more cautious than they were in 2016. The 2017 survey is evenly split, with 41.56% of companies saying they plan to invest in a new wide-format press in the next two years, and 41.56% saying they don't. This is significantly less bullish than the 2016 findings. It's not a one-off either - 29.63% indicate that they do not plan to invest in any area of wide-format technology in the next two years. In comparison, 26.34% have budgeted to spend up to £20,000 and 25.10% plan to invest between

### Q33 Do you expect to invest in a new narrow format or production digital printer/press in the next 2 years?



£20,000 and £74,999. This caution may also partially reflect the fact that many companies have invested heavily in the past few years and are now focused on reaping the benefits.

The main drive behind the sector's capital investments is simple enough - 24.28% want to increase capacity. The desire to move into new markets - expressed by 15.29% of companies - is not as strong as in 2016. This may indicate that printers are looking to play it safe or, alternatively, that their traditional markets are so strong they see no need to diversify. They may also feel they have plenty more value to harvest from existing customers - 14.81% of companies looking to make capital investments plan to acquire design software. Others are focusing on efficiency, with one in nine purchasing software to improve workflow. In comparison with 2016, finishing seems to have fallen down the investment agenda, with 10.29% planning to buy a laminator.

Much hyped 'new' applications of technology in the wide-format sector continue to appeal to the few, rather than the many. Web-to-print is a focus for only 7.82% of respondents' investments, while software for versioning and variable data print is on the shopping list for a mere 0.82% of businesses. The suggestion that Web-to-print is stalling was reinforced by a recent global report from Drupa which found that, globally, installations had fallen significantly in 2016. Yet some British companies are making Web-to-print pay, notably Your Print Partner with its online ordering Santa Sacks service and T'Go Creative which offers online wallpaper design and ordering. If the application fits the B2C model then Web-to-print seems an obvious development.



### **Actively investigating and supporting the wide-format print sector**

Authored by former print professionals, Image Reports provides intelligent news coverage which targets those that produce and sell wide- and grand-format digital print.

Dedicated entirely to the digital print provider rather than the manufacturer or supplier, Image Reports presents information via three main filters – business, technology and the environment.

Also part of the Image Reports family is Widthwise Report, an annual survey and report on the state of the UK and Irelands wide-format print sector which is packed with facts, figures and features.

Think Bigger takes a stab at defining the type, role and motivations of those the print sector is so eager to better understand!

- **Magazine**
- **Newsletter**
- **Website**
- **Supplements**
- **Bespoke Events**
- **Roundtables**
- **Research**
- **Reports**

[www.imagereportsmag.co.uk](http://www.imagereportsmag.co.uk)  
[@imagereports](https://twitter.com/imagereports)

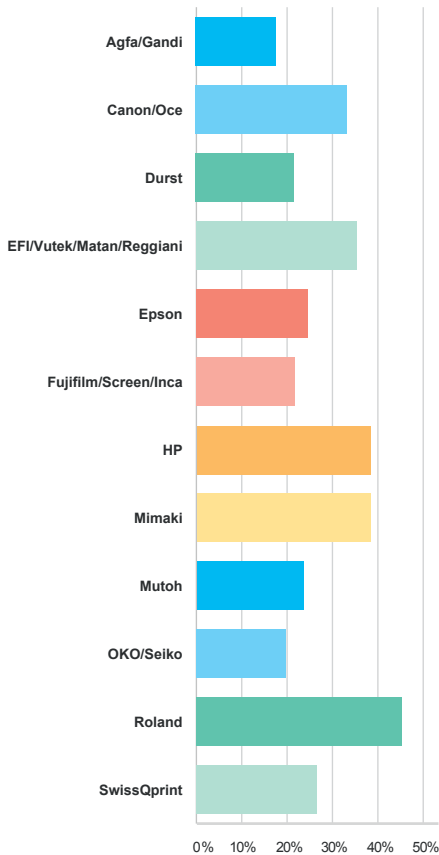
Please contact James to discuss advertising and sponsorship opportunities:

**Tel: +44 (0) 20 7933 8976**  
[jamesm@imagereportsmag.co.uk](mailto:jamesm@imagereportsmag.co.uk)

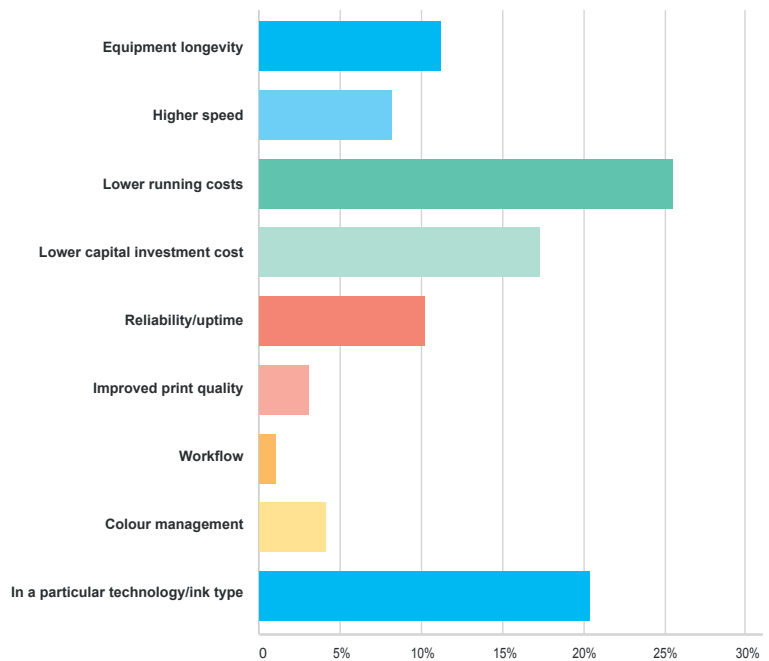




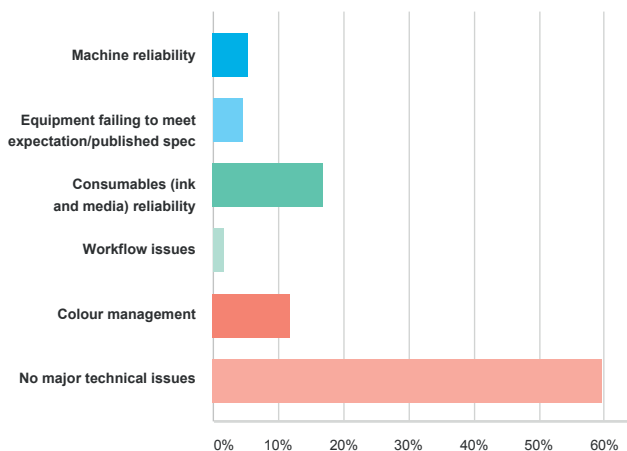
**Q35 From the list below, which 3 companies do you consider the most innovative? (graph indicates top ranking by respondents)**



**Q36 Where would you like to see more innovation in wide-format? (graph indicates top ranking by respondents)**



**Q37 What is the biggest technological issue you face in wide-format?**



What PSPs say they want from suppliers is consistent with previous years: lower running costs is the top priority for 25.55% of respondents, while 17.33% would like to see the cost of capital equipment reduced. The good news for suppliers is that six out of ten print companies said they had no major technical issues yet, as in 2016, the reliability of ink and substrates was the biggest technological concern with 16.87% of businesses flagging this up. The other welcome news for vendors is that they are generally regarded as innovative, with Roland (chosen by 46.15% of respondents), Mimaki (39.64%) and HP (39.58%) rated particularly highly.

The theme at this year's Fespa, a show to which many wide-format printers will gravitate, is 'daring to be different'. Wide-format PSPs have, traditionally, dared to try different technology. The continuing digital disruption of the sector has meant that many businesses had no choice. Yet if anything, the 2017 Widthwise survey suggests that British wide-format printers are daring to ignore much of the conventional wisdom - about the need to diversify, invest and reinvent themselves - and stick to what they now know. ●

# Future gazing

What key technical developments are anticipated in digital large-format?

Richard Stuart-Turner asks suppliers for their thoughts

Given that the Widthwise Survey polls large-format PSPs, this report naturally concentrates on data and input from that section of the industry, but what do the suppliers have to say about the future of the sector, especially in terms of technological development going forward? Printers and their development are oft covered, and the 'Technology Findings' in this issue again looks at those in some depth, so for this article we talked to software, inks, media and finishing specialists for their thoughts on the key anticipated technical developments in their respective fields.

## Inks

**16.87% of Widthwise respondents cited consumables (ink and media) reliability as the biggest technological issue that they face today in wide-format - an issue ranked higher than any other. However, there is constant progress and innovation happening in this area, which has continued to make up a large share of manufacturers' R&D budgets over the last few years.**



**John de la Roche**

National sales manager for sign and graphics, Hybrid Services

"UV inks have been developed quite a lot over the past few years by Mimaki and other companies and we're seeing massive growth in the UV market. Because a UV printer will effectively print to anything, the inks have had to be developed to make a good print adhesion with the substrates we've been using.

"Two or three years ago there was only a small choice of UV inks but over that time we've seen many changes. The first of these has been the development of a very good white, which is very important because without white you can't print onto dark substances, dark medias or acrylic type materials. The next development was a printable primer. Prior to that, for glass and metal we used to have to manually wipe substrates with a primer. The other [key development] is clear, or varnish, which has been really successful for POS and specialist packaging.

"The stretchability of UV inks has progressed too. Our LUS-350 ink is highly stretchable and means you can make 3D signage like you might see at burger bars, as well as prototyping for bottles where the material is pre-printed before it goes in a vacuum forming machine.

"UV inks will develop again to give them a higher degree of UV stability in terms of sunlight and UV light. The toughness of them will also be developed as they have to go into some very demanding environments."



**Phil McMullin**

Sales manager for pro-graphics, Epson UK

"We spend around \$2m a day on R&D in Japan and probably about half of that is on ink chemistry - both enhancing the inksets we've already got and trying to come up with new inksets that will hopefully operate in our piezo PrecisionCore printheads.

"We are currently looking at a number of options. We have UV ink in our SurePress label printer and that ink could potentially be used next in flatbed applications. One of the areas that everybody is interested in still is resin, or latex, ink and that's still an area of interest to us as well. If you're talking about the next three to five years then you'd expect to see that sort of inkset coming out of Epson's R&D.

"What we're also looking to achieve in our factories is not only fantastically good ink chemistry from the R&D lab but being able to replicate that, cartridge after cartridge, to get exactly the same performance out of any two cartridges, both in terms of reliability but also the colour as well - it's about that consistency.

"Separately, since we introduced our latest generation UltraChrome GS3 eco-solvent inks, we've seen a massive take-up again in eco-solvent and that's reversed the trend that has been seen over the last five years of people going down the latex route almost exclusively. It's almost got to the stage where eco-solvent can produce the same quality as aqueous."

## Software

As one of the biggest expected investment areas over the next two years, it's evident that more and more PSPs are starting to look at the ways that various types of software can help them in the day-to-day running of their business. 14.81% of those surveyed said they are expecting to invest in design software in the next two years (and 48.97% said they will be adding/increasing creative design services in the next year), followed by workflow (11.11%), W2P (7.82%) and MIS (5.76%).



**Marc Hermans**  
Director of sales for EMEA, SAI

"There is a growing demand from customers for being made aware of potential problems with files that they get from third parties and this is something that we continue to work on with our Flexi products. They want the software to say when there's a font missing, for example, or if there's no profile with a file, so that they don't have to go through printing the first square metre before noticing something is wrong with the output.

"Separately, 3D printing has come a long way in the last few years and the technology has evolved a lot in the last year and a half specifically. But the question is, when will the pivot point be that 3D printing will become a mainstream tool that will be productive and can make us profit in our industry? This might not be tomorrow, or the day after that, but it's likely to happen and a lot of the software players in our market will have to look at that.

"I also think that subscriptions are going to be the future for software in our industry because people want to get away from hefty investments. Instead of paying £3,000 or £4,000, they are starting to have a preference of this monthly payment of £40 or £50 which will give them access to the same features, with the added benefits of any updates."



**Erik Peeters**  
Workflow solutions marketing manager,  
Agfa Graphics

"I think people underestimate the capabilities that they can gain by implementing a good workflow solution. Some companies are really seeing the value in using one workflow, while others have that mixture of different Rip solutions and they can cope with it. In my opinion that's not the most efficient way because then you have different people that can fiddle around in different ways in order to get output right. By having one production hub, you make sure that you get a certain quality that you can deliver day after day and month after month. I think more and more PSPs will move in that direction of having one workflow.

"Workflow has to cater for very specific applications. Instead of using standalone tools and building your own solution to get an application sorted out, people expect it to be available in one user interface, which is how it becomes a workflow. If you look not only at Agfa, but also Caldera or Onyx, they've been focusing on nesting functionality for example. PSPs need to get certain print applications sorted by using the existing tool that they have in a smooth and efficient way. That's the main challenge for us - there is some quite repetitive work out there and it's easier to have some preset options on a workflow than setting the same parameters over and over again.

"We will be going after offering solutions for very specific applications, so this might be printing on glass, ceramics or textile, but it will be in that industrial area. I'm not saying that we're there completely for sign and display yet - there are still things that we need to do and improve - but in terms of major development we will go and look at other markets now as well."



### Media

Choosing the right media can turn a run-of-the-mill print job into a great one, and increasingly the symbiosis of unusual media/print/application is providing opportunity for both PSPs and suppliers alike to stretch digital inkjet opportunities into new/expanding markets. Innovation looks set to continue, particularly with the rise in digital textile printing, as well as for applications like wallpaper and flooring.



**Tim Egerton**  
Sales manager, Soyang Europe

"I think the key development that we'll see in the UK is that more and more is going to be printed on textiles, which is far from mature as yet. That side of the business is growing for us year-on-year and we don't see any evidence of it slowing down. I believe we will see a continued explosion of textiles in the retail and exhibition sectors especially because they seem to be two of the prime areas of growth. Over and above that I think there will be some areas of specialism as well; we might see household textiles and that sort of thing developing and possibly also slightly more technical textiles as well.

"One customer recently told me that a 100m roll of flag fabric is printed in 45 minutes at 3m wide, so that gives you an idea of the sort of throughput these machines have, and are going to have. We'll have to adapt to that and start introducing things like jumbo rolls of media so that they can put on a big roll instead of just 100m, maybe up to 500m plus even.

"Wallcoverings is another big growth area, as are window graphics and solar flare. We've recently introduced an optically clear polyester film that could be used for window manifestations, and similar, and I think that will develop in the future as well."



**Chris Green**  
Head of channel sign and display, Antalis UK

"A lot of commercial printers have diversified into the wide-format market and some of those want to be guided into it, thus there's a drive for easy-apply films. They might not have the technical applicators within the business so something that is easy to install and remove is an absolute must. And the guys who have been in the market all the time are now looking for innovative things to move them into new markets so we've seen a big drive towards wallpapers, wall graphics, and a lot of different textures to really make them stand out and be quite creative in their output.

"I think wallpapers will continue to do well because it's access to a market which is more domestic as well - it's not just for commercial receptions but also for people's houses. Wallpaper is an easy product to get your head around and there are so many different finishes available.

"Textile is the next big thing for us in terms of our focus and getting our offer to market at the back end of this year. But we don't want to just be 'me too', we want to offer something different and more creative.

"With the rigid substrates, if anything more development has probably come from the ink manufacturers. We're now on third or fourth generation inks and they're magnificent in the way that they can stretch with products. So somebody buying a machine can get a really good print out of it as long as they're using the right profile."

## Finishing

Investment into large-format finishing kit looks to be slowing down after a healthy few years but, nevertheless, 10.29% of Widthwise respondents said they are expecting to buy a laminator in the next two years while 7% are planning to invest in a contour cutter. And as one of the areas of large-format that could be most impacted by increasing levels of automation in the near future, finishing developments are definitely worth keeping a close eye on.



**David Smith**  
Marketing communications manager,  
Vivid Laminating Technologies

"I would guess laminators are still doing well because the technology continues to move on, whereas there's not an awful lot more you can do with some of the other wide-format finishing kit now. We continue to innovate and introduce new technologies, new systems and new ways to do things.

"We have a lot of end users that are one-man band signmakers with a workshop that includes a wide-format printer and a laminator. Some of them find that the rolls of laminate can be a bit heavy so one of the things that people request from us is to make the loading of the rolls a little bit easier. That's something that we're currently working on and later this year we will introduce a much simpler way of being able to install the laminate and put it onto the machine.

"Our biggest recent development is the fact that we've taken the technology that we've used in the Matrix, with the pneumatic rollers, and put it into our Easymount to create the Easymount Air. You can lock the roller in place and it has this intelligent technology that knows how much pressure to put down and the height that you need. And it locks in that height and pressure so that you can just feed in board after board."



**Alex White**  
Managing director, Blackman and White

"I think people are finding that subcontracting out cutting is difficult with the short turnarounds and some of the requests from customers to do small volume runs, samples, and so on. It's very difficult to compete if you're a small sign shop without a digital finishing solution. If you bring it all in-house then for very little cost you're quickly able to take on a much wider range of jobs and generate a much higher margin.

"I think the future of digital cutting is about automation and making the user experience simpler. It's about speeding up the time for sampling to be able to automatically assign speed to the media and just to make the operator's environment more simple to understand. It's also about building more of the decisions into the Rip so that some of that skill is taken away from the operator and put into the design office where the person sitting at the desk doing design is able to determine how the parts should be cut. This makes it simpler for the operator to use the machine and companies can use a lower skilled person rather than having that one operator who's really good at operating that machine.

"We haven't seen a huge take-up of robotic solutions for pick and place for removing parts as it's difficult to justify in terms of the cost to the return. I believe that the huge print houses will have a use for robotics, and that robots will find their way more and more into those sorts of applications, but it only makes sense when you're doing very high volume runs." ●

# Divided and unconquered

When it comes to environmental issues and the large-format digital print sector, opinions and actions are as divided as they can get.

Business is talking a better game on the environment than it is actually delivering. That is the stark conclusion from the findings of the 2017 Image Reports Widthwise poll. Just over one in four say offering ‘green’ print options is not important for their business, while 31.28% say it is less important than it was two years ago. Just 26.34% say the need to offer environmentally friendly services is more important than it was in 2015.

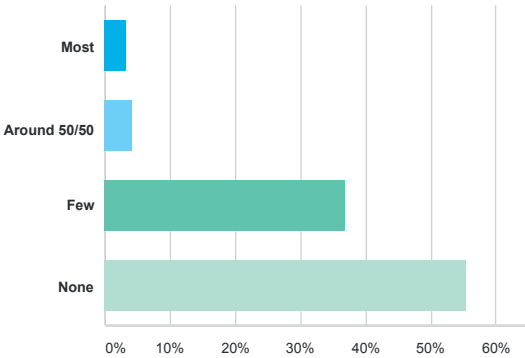
If you put these findings in a wider context, they are no great surprise. The global consensus that something had to be done about climate change has been shattered by the election of Donald Trump as US president and his appointment of global warming sceptic Scott Pruitt to run the Environmental Protection Agency. There is talk of pruning environmental regulation in this country once the UK’s exit from the EU has been accomplished. On the flipside, China’s enthusiasm for environmental causes has deepened - probably because the Chinese can see what pollution is doing to the quality of their lives.

For the first time since this survey was launched in 2007, the world is approaching a parting of the ways on the environment. Yet whatever politicians might say or do, many businesses remain firmly committed to sustainability - it makes good business sense (it

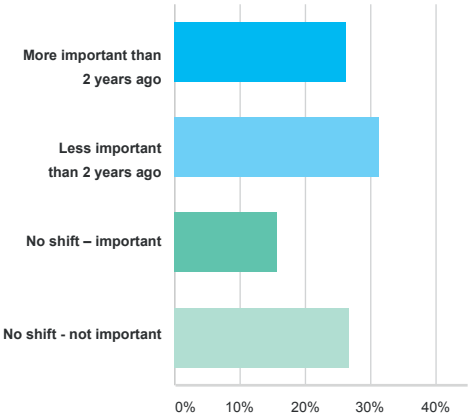
can save them money), and many, like most of the world’s scientists, find the case for global warming convincing. They also don’t want their reputation to be damaged by a Deepwater Horizon-style eco-disaster on their watch.

British print buyers have equally divergent views on the environment. The Widthwise poll says that 55.56% of them never ask a printer about their environmental credentials or sustainability plans. Only 3.29% of wide-format printers said that most of their clients posed the question.

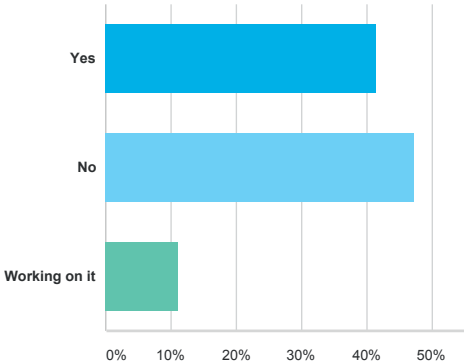
Q39 Do clients ask for your environmental credentials or ask for your sustainability plans?



Q38 How important is it to offer ‘green’ print options?



Q40 Do you have environmental accreditations?





This probably explains why a small minority of print service providers - just 5.76% - say they fear that clients may reduce or withdraw business because print is seen as environmentally unfriendly compared to other media. A resounding majority - 76.13% - said they did not expect clients to pull back from print.

All this suggests that, despite the signing of the landmark climate change agreement in Paris in 2015, sustainability has drifted down the world's agenda. For many voters, safeguarding the world is less important than safeguarding their standard of living. And the real or perceived threats to that - inflation, immigration, automation, globalisation - seem more immediate than the prospect of another eco-apocalypse such as Japan's Fukushima tsunami.

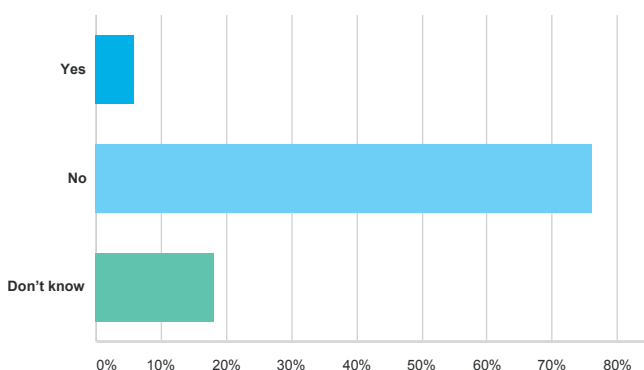
That said, Millennial consumers insist they are willing to punish companies with policies that damage the environment - and some have done so. Regulators, especially in Europe, are not looking to loosen environmental regulations. Trump's election in the US has also sparked a new wave of consumer activism there and, although it's hard to gauge how effective these boycotts have been financially, none of the companies targeted have relished the experience.

In that case, it's just as well that 41.56% of the print service providers surveyed already have environmental accreditation, with another 11.11% working on it. The

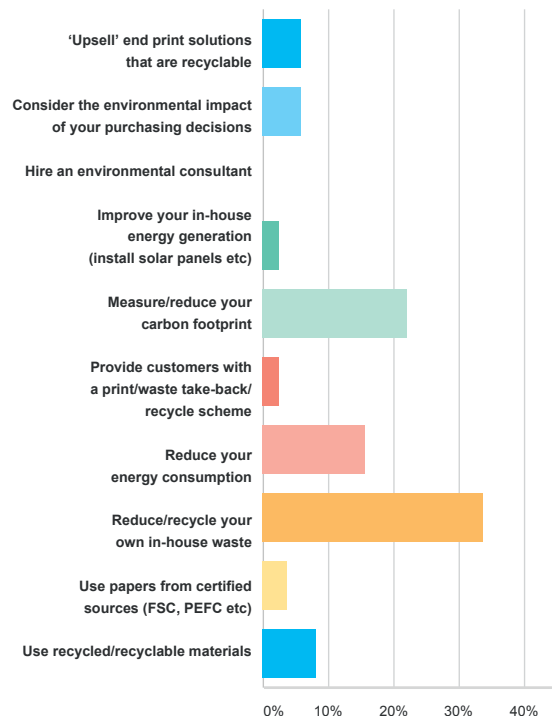
major environmental priorities for printers remain straightforward - 33.7% plan to focus on reducing/recycling their own waste. An encouraging 22.22% are looking to measure their carbon footprint. This is probably long overdue for many: only 5.76% actually consider the environmental impact of their purchasing.

In truth, print buyers were never as green as they professed to be. Which probably means that, despite the forthcoming bonfire of environmental regulation in the US, the drift away from sustainability will probably not be as great as the headlines might suggest. For print service providers, the message is: sustainability still matters. ●

#### Q41 Do you expect clients to reduce or withdraw business because print is increasingly seen as environmentally unfriendly in comparison to other options?



#### Q42 What is your major environmental focus for 2017





# Listen up: John Thackara has a point

When it comes to being environmentally conscientious the policy of “do less harm” needs to give way to one of “make things better” says this sustainability expert, author and designer.

**I**f wide-format print no longer existed, how would you stay in business? This is the kind of question that John Thackara, sustainability expert, author and designer is often tasked with answering.

In one particular case, an airport operator hired him to ask the simple question: how do we ensure we have a business if airline travel becomes environmentally unsustainable?

That scenario might sound far-fetched but Thackara says history proves otherwise: “The French

philosopher Edgar Morin puts it beautifully: ‘All the great changes have been unthinkable until they actually came to pass - the fact that a belief system is deeply rooted does not mean it cannot change.’”

The media message now is that sustainability is not as great a concern as it was. Thackara disagrees, saying: “There is an escape from an economy that devours nature in the name of endless growth. This is not just possible - it is happening. It’s just that the media isn’t paying attention.”

As an example of what can be done - and the complexities involved - he cites a recent trip to a Swedish company where, after 20 years of obsessive effort, they have taken the chromium from table legs, replaced the PVC in wallpapers and stopped using formaldehyde in textiles. The one challenge they have not been able to crack: transport. As he says: “The line of trucks they use would stretch all the way from Stockholm to Beijing.”

To save the planet from the apocalyptic consequences of climate change, Thackara says all we need to do is live - and work - in such a way that we consume 5% of the resources we currently do.

That sounds absurd but, as he points out, eight out of ten people on Earth already live that way. The challenge is two-fold: the other 20% need to drastically shrink their carbon footprint, while the 80% need to realise that replicating the lifestyle of their wealthier counterparts in the north and west is untenable.

So Thackara’s message to business in general - and to wide-format printers in particular - is that a policy of “do less harm” needs to give way to “make things better”.

He may be right: whatever politicians are doing, global companies such as Unilever, Coke, Marks & Spencer and Pepsi are sticking to their ambitious environmental targets: the latter is forecasting that it will shrink its CO2 emissions by 20% by 2030 - and it will do that no matter how much the business grows over that period. That’s not the 95% reduction in resource use Thackara advocates but it is a giant step in the right direction.

As he says: “We use more energy and resources in a month than our great-grandparents used in their entire lifetime.” That has to change. Despite the gloomy, apocalyptic scenarios he has dubbed “climate porn”, Thackara is optimistic that individual actions can - and already are - making a difference, growing food, restoring soils, designing homes, generating energy and using climate friendly technology.

Each company, he argues, could start to create a new economy by asking two straightforward questions: “What would a more sustainable world look like? And how do we get there?” ●

# easymount.<sup>®</sup>

**AIR**

## Highly recommended.



Preferred Wide Format Laminator

### PrintWeek

Star Product, February 2017



Product of the Year:  
Highly Commended



Winner:  
Readers' Choice Top Product



Nominated:  
Readers' Choice Top Product



“ Everything becomes quicker and easier. We've already increased both our production and our profits. ”

Digital Deadline, Melton Mowbray

- 10 metres a minute
- Intelligent pneumatic technology sets height & pressure automatically
- Patented 'floating' rollers
- Up to 30mm mounting thickness

The award-winning Easymount Air laminates stunning wide format graphics and board mounts, on one of the most advanced concepts ever seen in a wide format laminator.

Pneumatic air pressure controls the laminating rollers, allowing you to mount and laminate with incredible accuracy and speed. Rollers can be locked in place at the exact thickness of the board to prevent crushing the front edge and giving rollers a longer life. The roller 'floats' down to sit on the board without damage.

The revolutionary Easymount Air features 30mm mounting thickness for even more applications and at 10m a minute, is over 50% faster than most other wide format laminating systems.



vivid-online.com

0845 1 30 40 50

innovate laminate<sup>®</sup>



Supplier of the Year 2016

British Association for Print and Communication



*1600 II*

*3200 R*



**Driven by Fujifilm Technology** Designed for Creativity

**AcuityLED 1600 II**

**Now even faster and more versatile, with simultaneous colour, white and clear ink printing.**

Powered by Fujifilm's leading printhead and ink technologies, this is a reliable production machine built to deliver exceptional results.

**AcuityLED 3200 R**

**Produce high quality superwide display and exhibition graphics in the most cost-effective way.**

With low energy LED UV curing technology, the Acuity LED 3200R delivers excellent production efficiency with impressive productivity.