



# 2019

**An Image Reports publication**

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on the state of the UK and Ireland's wide-format print sector

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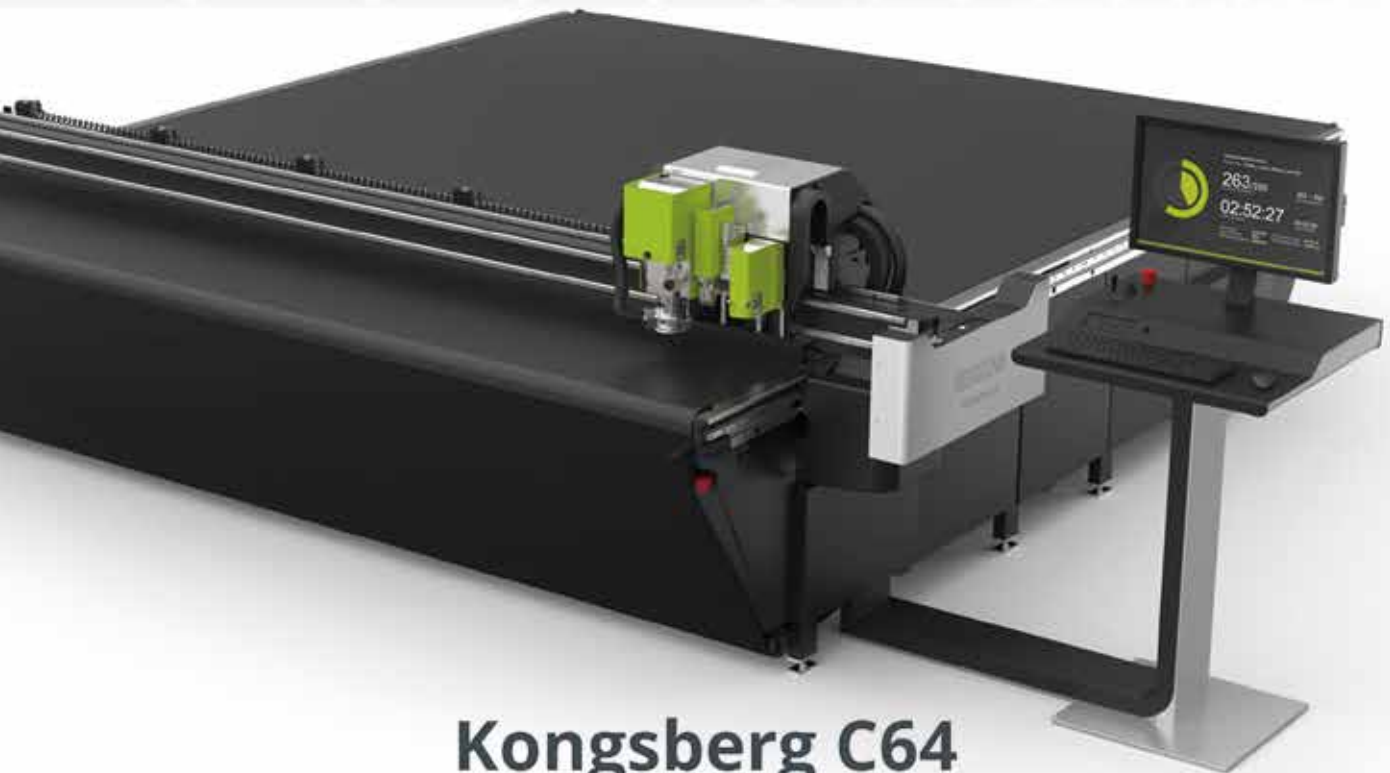
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# WIDTHWISE 2019

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# WELCOME TO WIDTHWISE 2019



Can you believe that this is the 12th annual Widthwise Report? If you were one of the 247 who responded to the 2019 Widthwise survey - carried out by Image Reports at the start of the year - then a massive thank you. It is your input that has enabled us to put together this independent and in-depth analysis of the UK and Ireland's large-format print sector.

As always, within these pages you will find easy-to-digest graphic representations of the information and data gathered in the poll, together with written analysis of the stats and associated editorial commentary on doing business in these uncertain times.

Again included in this report too, are numbers and words from consultancy Lightwords, based on its own sourced data from suppliers.

We hope this Widthwise Report helps you transition your print business successfully towards a post-Brexit Britain.

Lesley Simpson  
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# The Future is Bright

Want to know in a nutshell what's happening at grassroots level in the large-format print sector? Let me tell you.

It's what we all wanted to hear - optimism in the large-format digital print sector prevails, despite angst over Brexit and pricing. This is no gut feel statement - it's data-based fact from the 2019 Widthwise poll of the UK's and Ireland's PSPs.

Of the 247 print chiefs who responded to the independent survey - carried out by Image Reports at the start of the year - 105 of them said that, looking ahead five years, they were 'very optimistic' about the state of business. Another 97 said they were 'mildly optimistic', which may sound a bit like damning with faint praise, but the thing to also point out is that only seven respondents said they were even 'mildly pessimistic' and just two 'very pessimistic'.

The good news doesn't end there. Though 33 PSPs said large-format print margins fell last year, more than half (50.61% - 125 comps) said that they had increased. So perhaps it's not surprising that, despite all the diversification going on, 63% expect large-format digital print to become a bigger slice of their total business turnover over the next two years. A whopping 86.64% expect to grow their large-format print turnover specifically in 2019.

Of those 211 companies that expect their large-format turnover to grow this year, the biggest group (36.02% - 76 comps) said that growth is expected to be in the region of 1-5%. But, nearly as many (35.55% - 75 comps) said a 6-10% growth is expected, and 9% of the comps - so 19 of them - expect an increase of more than 21%.

It might be tempting to think that this optimism is representative of a certain type

of PSP, whether that's by location, size, speciality etc - but that's not necessarily the case. The mix of PSPs responding to this twelfth annual Widthwise poll is just that - a real mixture, and a reflection of the shape of the sector.

37.65% of those interviewed each turnover under £250,000, and almost half (48.48%) have five staff or fewer. On the other hand, for 29.56% turnover is more than £1m (including 12.96% turning over more than £5m) and 7.29% have more than 100 staff. 79.35% bought their first large-format printer over a decade ago now, and for 85.02%, wide-format digital is the only kind of print they do.

Asked how they felt about their company's prospects, 57.89% said they were confident of growth. Another 33.20% admitted to being 'concerned, but less so than they were in 2018'. Thankfully, only 8.91% said they were more anxious - a figure not to be dismissed of course.

As you might expect, the impact of Brexit was top of the list of concerns for 2019 and beyond, with 61.96% saying it was one of their major worries. Again unsurprisingly, that was followed by the price of supplies - listed by half (50.20%).

However, 34.82% still expect to increase staffing in the period to the end 2020. Despite lots of talk about finding it increasingly difficult to recruit, 77.33% said that's not the case. Moreover, 94.33% say they are not finding it harder to retain staff, despite the common belief that that is so.

Interestingly, one-in-five (21.46%) said they will be specifically recruiting people with particular new sector knowledge in

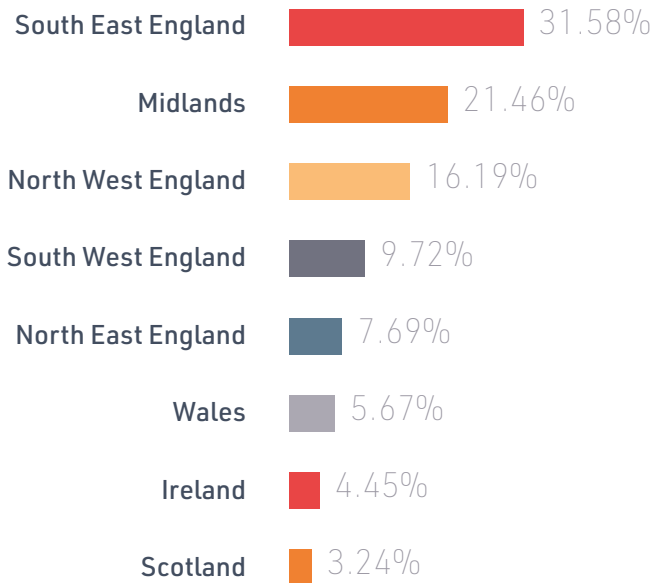
2019, despite entry into new markets becoming a fairly low priority for many PSPs - 72.47% said they will not be looking to move into new areas of large-format print over the next two years. We analyse that further into this report, but it's worth noting that asked to indicate which areas of work they currently undertake, of all the sector options given, general banners/flags work was marked by the most PSPs (80.97% - 200 comps). But textiles are as yet not as big a part of that as you might think. Only 12.96 (32 comps) said they are doing that.

Asked which markets are fastest growing for their company, exhibition and display graphics came out top (15.79%), followed by general banners/flags (11.74%) then transport graphics (6.88). Specialist markets oft highlighted as potential major money-spinners, are not growing fastest - packaging was earmarked as the fastest growing type of print by just 1.21%, cardboard engineering by 0.81%, and no-one said furniture. Five companies (2.02%) said textiles for garments and three (1.21%) said textiles for home/interiors.

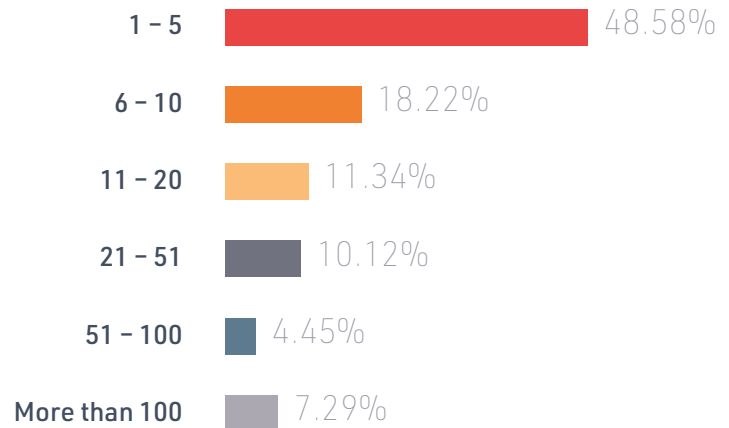
While the majority (72.47%) do not plan to move into new areas at all - and perhaps that's because they have diversified quite significantly already - of those that are, 5.26% said they'll move into textiles for banners/flags. Wallpapers/murals and textiles for garments each have 4.86% looking at getting involved. Textiles for home/interiors lags a bit behind at 3.64%, with other specialist sectors enticing fewer than those mentioned above - underlining the fact that niche sectors are, in the short term at least,



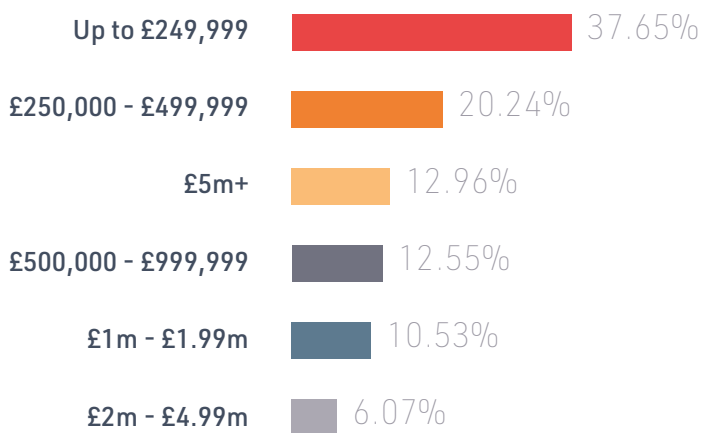
## Q2. Where is your main business based?



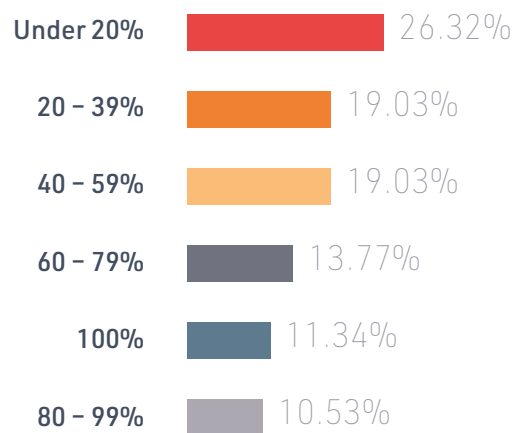
## Q3. Number of employees in your company



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



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



likely to stay just that for the UK/Ireland's large-format PSPs.

So if new markets are not particularly a priority for most, what is? Well, growing turnover. Half of the respondents said this was top of their 'must do' list for 2019. That was followed by 17.28% saying their priority would be actions to strengthen the company image/brand/reputation.

Certainly not top is investment in hardware/software! 44.94% spent £0 in 2018 and again expect zero spend during 2019 in hardware/software across the whole of their businesses.

While 32.79% expect to spend more in

2019 than in 2018, asked how much they expect to invest in large-format technology specifically in total in 2019/20, 64.37% of that sample said under £20,000.

More than half (51.82%) of all 247 respondents do not plan to buy a new large-format printer in 2019/20. Of the 34.01% that do expect to, the biggest group is buying UV curable flatbeds (30.95% - 26 comps) followed by solvent (21.43%) then UV roll-to-roll (17.86%).

Expected investment in software and finishing is very flat. 79.35% said they would not be buying any of the software or finishing options listed in the poll

(workflow, MIS, versioning, W2P, cutters, laminators etc). The biggest response (10.53%) was for design software, but all other software and finishing options were under 3.5% respectively.

Not a lot has changed in terms of outlook when it comes to Industry 4.0 (e.g. the Internet of Things, artificial intelligence, workflow integration) developments - 94.74% have still not invested in it and not one of them said they will do so in 2019.

It's a shame to end on that negative note, when the overall outlook is so positive - but the data tells it as it is! We delve deeper throughout the subsequent pages.

# The Findings: Business

**R**udyard Kipling would be impressed by the British wide-format print industry's ability to keep its head while so many around - politicians, business leaders, pundits, and celebrities - seem to be losing theirs, driven to despair by the prolonged agony of Brexit.

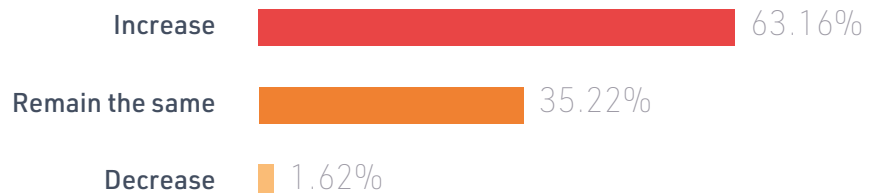
Against a gloomy media narrative about the immediate prospects for UK PLC, 42.5% of printers surveyed in Image Reports' 2019 Widthwise survey said they felt very optimistic about their business over the next five years and 39.3% were mildly optimistic. True, a small Eyeoorish minority - 3.6% - did express pessimism but, given the times, the optimism is remarkable.

Nor is this attitude simply based on a Micawberish belief that "something will turn up". In 2018, 50.6% of print service providers reported that their margins had grown - significantly up on the 2017 survey - while 36.0% said they remained the same. Just over one in two printers said that their margins on wide-format print were better than for other parts of their business.

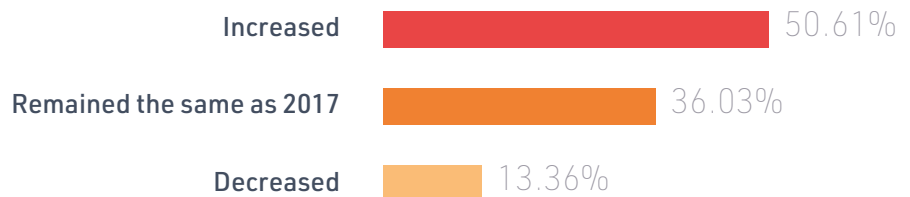
Expectations for 2019, even with the industrialised soap opera of Brexit rolling relentlessly on, are good too - 86.7% believe their business will grow, while a cheery 28.4% are confident of achieving double-digit growth in sales. The vertical markets where companies expect the most rapid growth are exhibition and display graphics (identified by 15.8% of respondents), general banners/flags/signage (11.7%), and transport graphics (6.9%). The survey found that 34.8% of companies feel so confident about the future that they expect to hire more staff in the next two years (compared to just 3.6% who expect to employ less).

The most popular sectors have remained pretty constant throughout the history of the Widthwise survey: in 2019, eight out of ten printers are involved in general banners/flags/signage; three out of four in posters and seven out of ten in exhibition and display graphics. Window graphics is the only other sector in which more than half of respondents are already actively involved. The other stalwart markets are floor graphics (38.5%), building hoardings/wraps

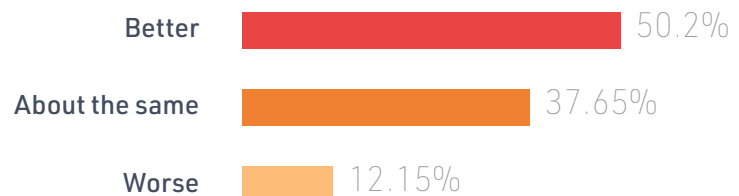
## Q6. Do you expect your wide-format turnover ratio to change in the next 2 years?



## Q7. How did your wide-format profit margins change in 2018?



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



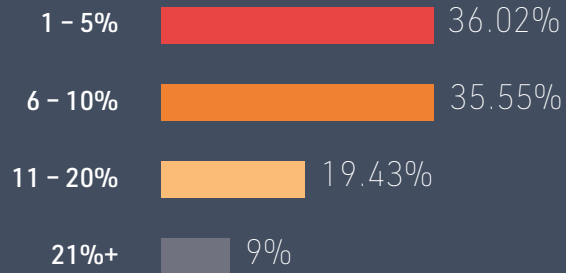
## Q9. Do you expect your wide-format turnover to grow in 2019?



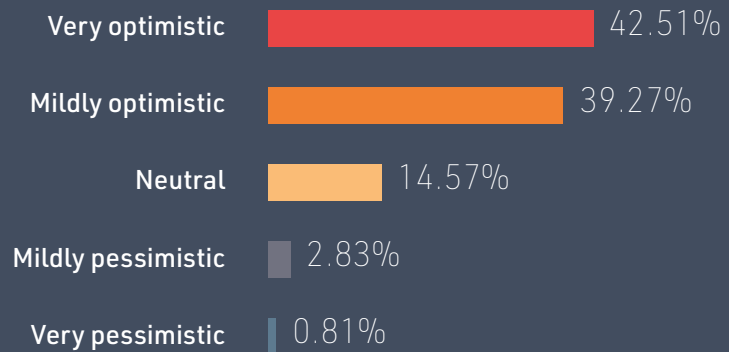
Q10. If yes, how much do you expect it to grow?

(29.5%), retail/POP/POS (23.5%), billboard and out of home advertising (22.3%) and wallpaper/murals (17.0%).

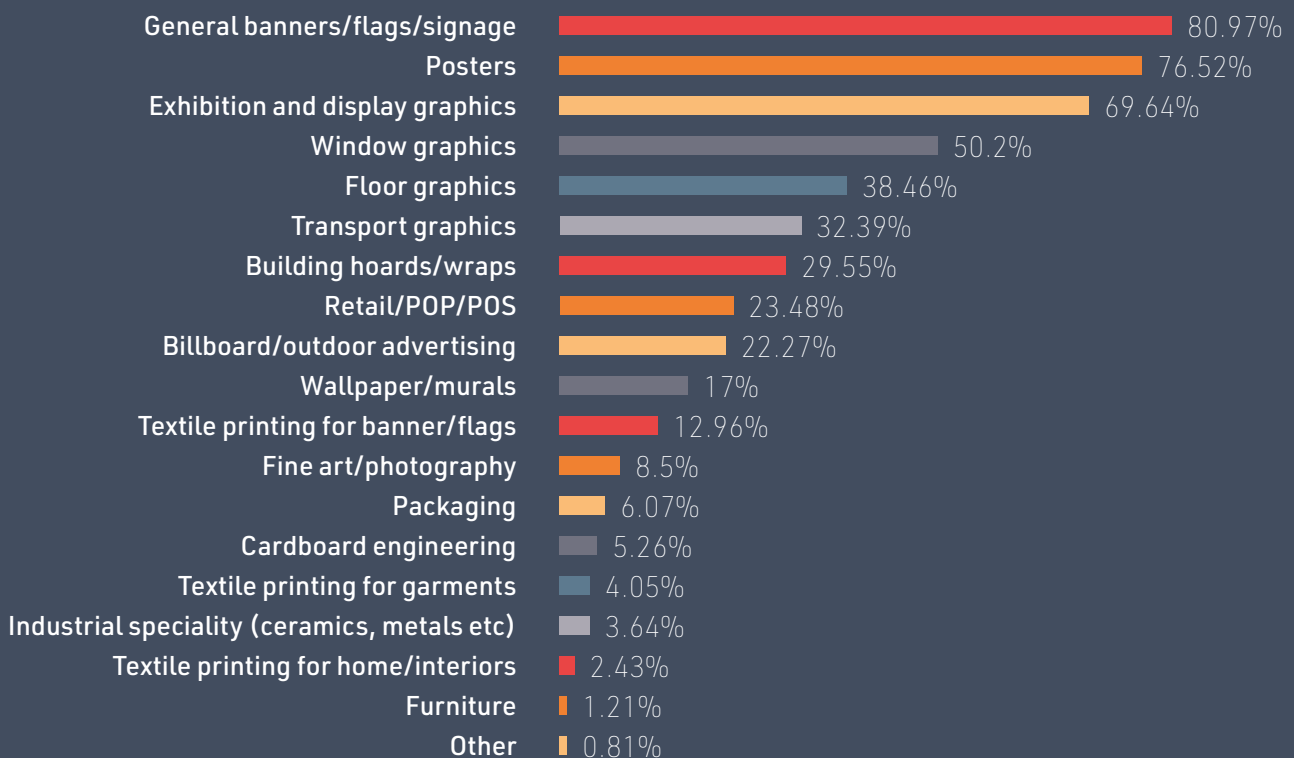
Such is the confidence that more than seven out of ten printers are not expecting to diversify into new markets in the next two years, preferring to stick to what they know. The sectors attracting the most interest for the minority looking to broaden their customer base are pretty evenly spread, with textile printing for banners/flags, wallpaper murals, textile printing for garments and building hoardings slightly more popular than the other options. It is hard to say whether these printers are looking to move into completely new markets or serving new demands from existing customers. For many printers diversifica-



Q11. Looking ahead five years, how do you feel about your business?

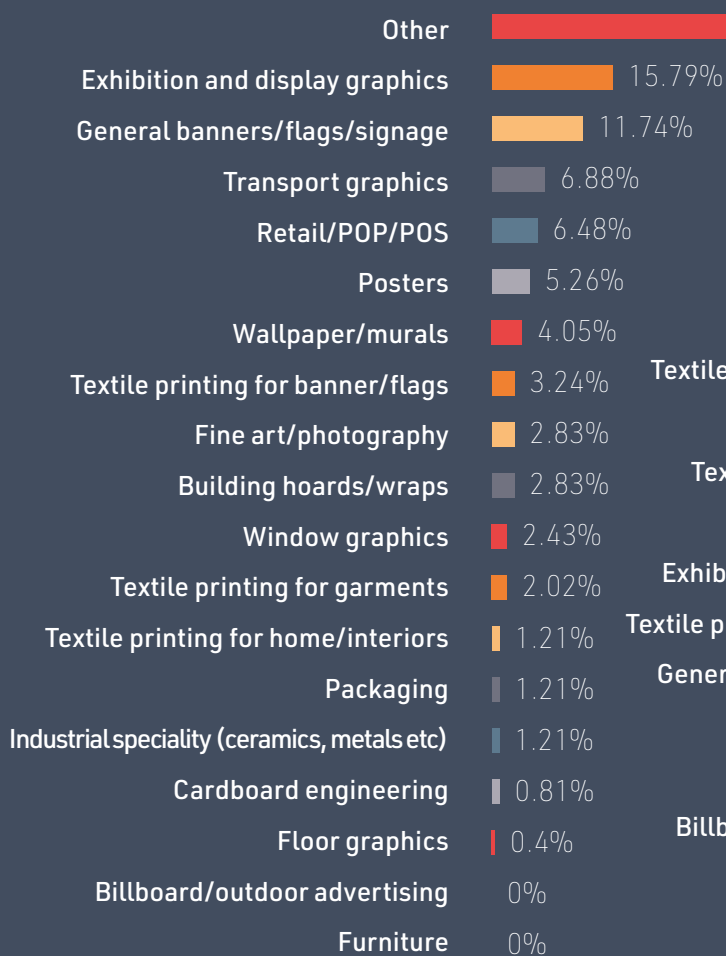


Q12. What type of wide-format print are you currently involved in?

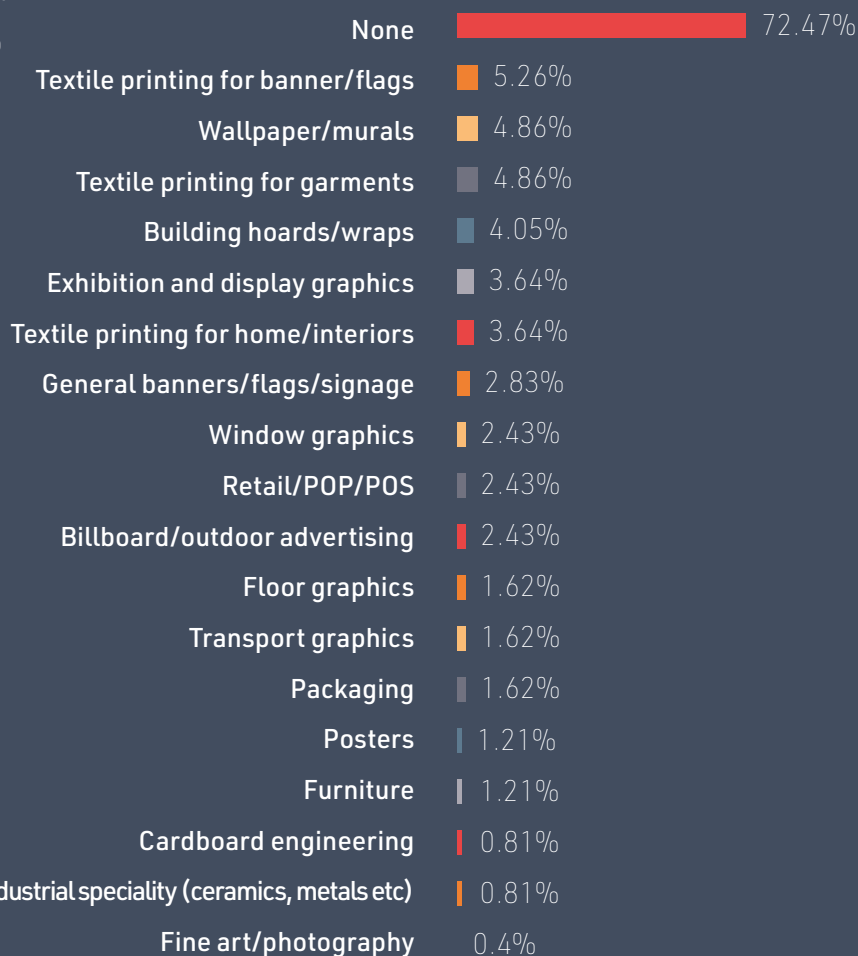




### Q13. Which of these is the fastest growing within your wide-format operation?



### Q14. Which of these wide-format markets will you move into over the next 2 years?



tion probably seems an unnecessary risk: 53.0% reported that their customer base had increased in 2018.

The wide-format industry’s priorities for 2019 are clear: half say that growing sales is top of their agenda and 17.3% say their main focus will be on strengthening their company’s image, brand or reputation.

Despite the export opportunities that Brexit may or may not provide, only 4.6% of respondents say their most pressing need is to develop foreign trade.

There is a caveat to all this positivism. One reason that printers are feeling so cheerful could be, as we explore in the technology story on pX, they’re not intending to spend very much on new kit. This is not necessarily a portent of doom as the industry has invested heavily and continually in the past five years. A certain fiscal caution seems appropriate at this juncture.

British wide-format printers do worry

about the impact of Brexit - 61.9% identify it as their biggest business concern - with 50.2% wary about the future cost of supplies and 23.5% troubled by the state of the British economy. That seems entirely reasonable given that the Office of Budget Responsibility recently announced that the best the UK could hope for in 2019 was a 1.2% growth in GDP. That forecast will probably be cut if the UK crashes out of the European Union without a deal, with many analysts predicting this will be the toughest year for the British economy since the 2008 recession.

So are wide-format printers living in cloud cuckoo land? Given that eight out of ten of those surveyed have been in the market for at least ten years, it may just be that they trust in the resilience of their business. Many openly say that the best hedge against disaster is cash in the bank. (That may also explain the comparatively low level of interest in investing in new kit over the next two years.)

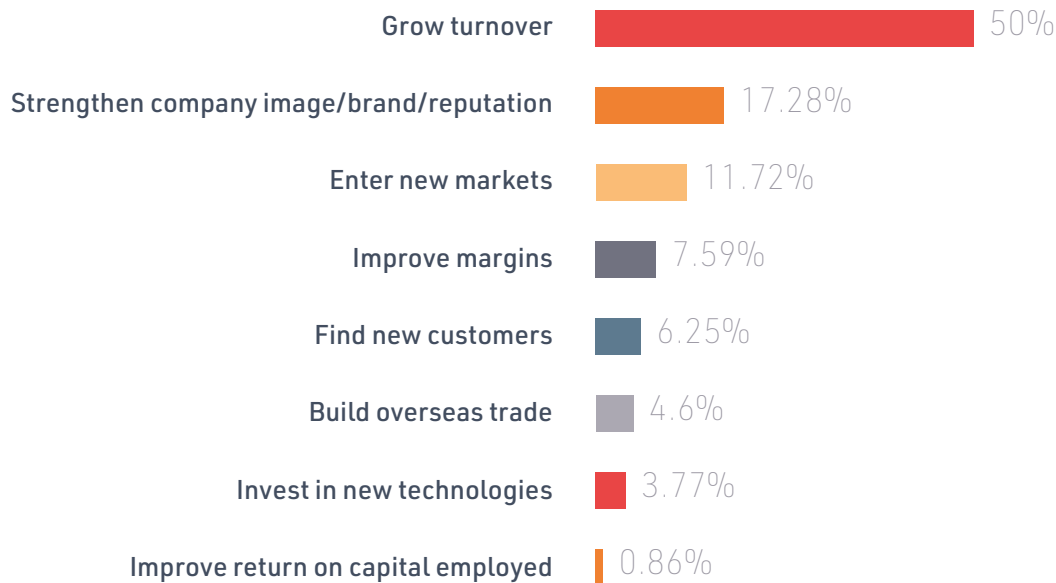
That attitude may also reflect the fact that privately owned companies have different strategic goals to publicly quoted corporations. For many managing direc-

tors in the wide-format sector, keeping the business going, and making a living, remain the paramount objectives. With no institutional shareholders or activist investors breathing down their necks, they can afford to take a longer-term view. Many activist investors, in their demand for a

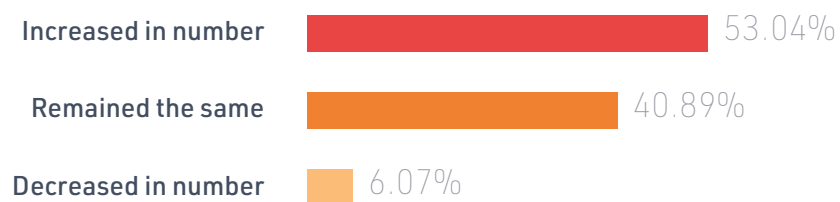
fast buck and bigger dividends, seem to have forgotten the old adage that markets can go down as well as up. Capitalism is, has, and always will be, a system of risks and rewards and, much as investors might want to insure themselves against losses, you can't have one without the other.

Fundamentally, if you run your own company and are not beholden to such expectations, does it matter if your business doesn't grow by 10% year on year? In reality, business is seldom that simple and, as many CEOs have protested, trying to achieve that kind of consistency might

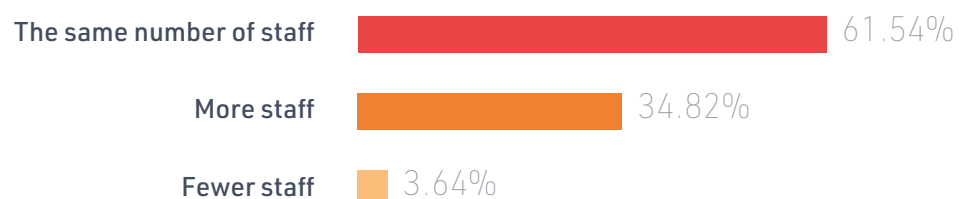
### Q15. What is your order of your priorities for the next year?



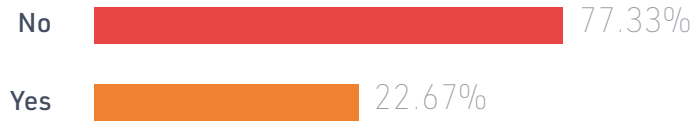
### Q17. How has your customer base changed in the past year?



### Q18. Over the next two years, do you expect to employ



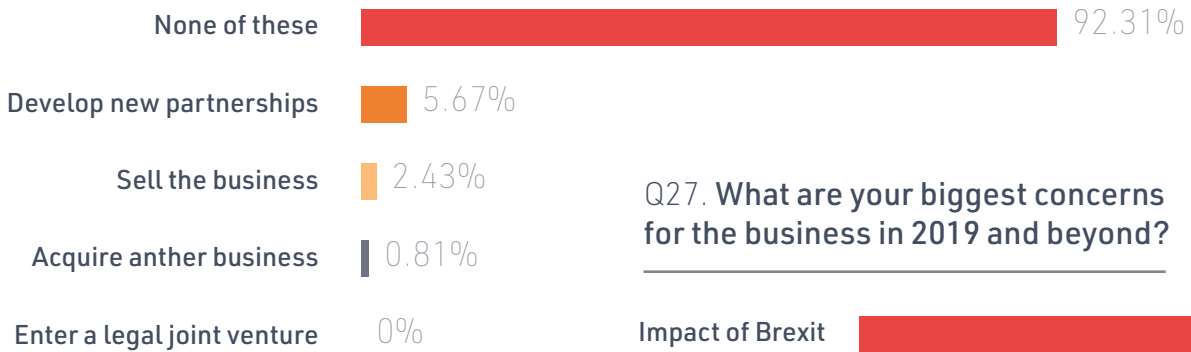
Q19. Are you finding it harder to recruit staff?



Q20. Are you finding it harder to retain staff?



Q23. In 2019 do you plan to do any of the following



actually prevent you doing the things you need to do to grow the company over five or ten years.

For many print service providers, a much more important goal is to ensure the business is viable when they choose to retire, sell or pass the company on to their heirs. More than nine out of ten companies say they have no plans to sell the company, acquire one or enter a new partnership this year, suggesting that owners are fundamentally content with their businesses.

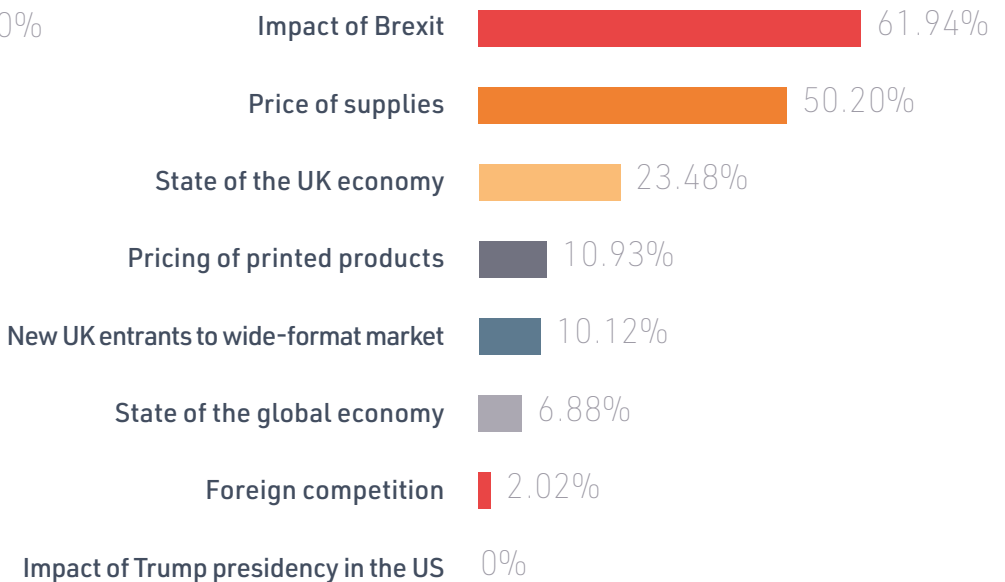
Will this risk management strategy pay off for British wide-format printers over the year ahead? With Brexit representing the biggest question mark over the country's future since the beginning

of World War II, it is impossible to say. With so many scenarios being spun, and divergent forecasts made, it sometimes seems as if those seeking to understand the future might do as well to revert to such old-fashioned soothsaying practices as slaughtering a sheep and interpreting

the poor creature's liver for portents.

The only certainty is that, given the country's anxious, at times hysterical, mood, wide-format printers are, in true Kiplingesque fashion, resisting the twin impostors of triumph and despair. Long may they that continue.

Q27. What are your biggest concerns for the business in 2019 and beyond?





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# Print redefined

The sign and display market is full of favourable business indicators, not least with potential new markets such as textiles, garments and décor opening up to digital print technology Ricoh's portfolio of products, allied to its partnership approach and service excellence, make those new opportunities more gettable than ever.

**A** Printing businesses with ambition for growth are looking for new markets and new applications to diversify into. In doing so, they are generally responding to the demands of their customers, who are increasingly looking to rationalise their supplier base, and utilise existing print suppliers to provide them with the complete range of their print needs, quickly and cost-effectively.

A FESPA Print Census by InfoTrends illustrates these trends clearly. It found great confidence among printers in the sign and display sector: 80% of them were optimistic, buoyed by a doubling of average revenues in the eight years from 2007; 45% of them were investing in technology to move into new markets.

The research discovered an evolving product mix, because although the old favourites of banners, billboards, signs and posters still led the way, some 80% of printers reported that they were doing more textiles, garments, décor and packaging. And the research identified four key trends in customer relationships that 70% of those printers expected to rise: point of need, personalisation, just in time production and faster turnarounds.

All of this suggests a market that is buoyant, and teeming with opportunity for the sign and display printer that has an eye for branching out and building the business. There are a number of printing technologies that can help them achieve this. While most of the industry has long used various solvent and aqueous digital inkjet systems, printers can now also take advantage of the unique characteristics of UV-curable and latex printing technologies.

Indeed, when the 2017 InfoTrends-FESPA World Wide Survey asked printers whether they planned to invest in a new wide format printer in the next 12 months, 31% said that they would invest in UV-curable inkjet, 16% in eco-solvent inkjet, and 13% in latex inkjet – the three largest categories.



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Both UV-curable and latex stand out for the large range of applications and materials that they each can bring in-house to a printer, saving on outsourcing and helping to tie customers in. Because the technology is digital, the print can be personalised and delivered quickly, thereby meeting those rising customer demands that the research identified.

With the rise of textile printing, digital direct to garment (DTG) printing systems are also starting to gain traction in the market, making the production of personalised items such as t-shirts, cloth bags and cushion covers another avenue that is potentially lucrative for printers looking to grow.

### Partners in success

All of this opportunity, were a printer to grasp at it, requires careful decision making, not least in the choice of technology that can make the opportunity a reality. There are a great many manufacturers selling excellent digital printing systems in all of the above fields, and Ricoh is now applying in earnest its 40 years of research in inkjet technology, its

### CASE STUDY – BEEPAG IN ITALY

When you claim that you can print onto any material, you need to back that claim up with the right technology investments.

Italian graphic design and print specialist Beepag is proud to make such a claim, and has invested in several Ricoh systems to back it up. Ricoh's Pro T7210 UV flatbed printer, for example, is allowing Beepag to explore new market opportunities through its ability to print onto a vast array of materials, including wood, aluminium and glass. It is printing industrial decoration such as customised doors and interior furnishings, as well as Point of Purchase display material.

The company also uses a Ricoh Pro L4100 large format latex printer to produce wallpaper for the retail sector, which is a flourishing application area.

Matteo Pinzauti, owner and chief executive of Beepag, commented: "The Pro T7210 is more flexible than other flatbed printers. It handles media of up to 110 mm in thickness, including wood, aluminium and glass, as well as printing onto cardboard and Forex."

commitment to working in partnership with printers, and its service excellence, to the sign and display market.

"As with our hugely successful approach to the commercial print market, we're always looking to help wide format sign and display printers to increase their margins, keep ahead of the competition, and improve customer satisfaction," said Simon Isaacs, National Sales Director, Commercial & Industrial Print

Group, Ricoh UK. "Our customers value us as a partner throughout their digital journey, and we will be there to support them all the way, advising and guiding as required, and applauding their successes.

There are lots of opportunities out there for sign and display printers, and we believe we can help them make the most of those opportunities.

<http://products.ricoh.co.uk/large-format>





# The Findings: Investment

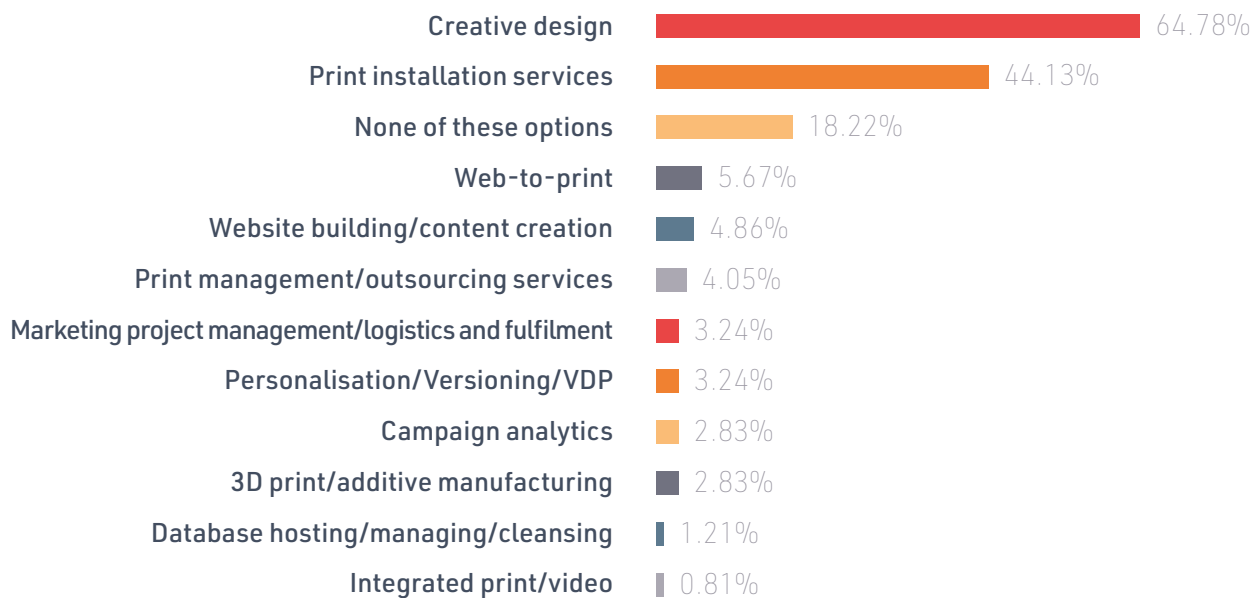
**T**he composer Johannes Brahms was once so impressed by a young pianist he sent him to audition for his patron in Vienna. The patron turned the pianist away, explaining to Brahms: “I have no interest in someone who plays the minute waltz in

56 seconds.” For management guru Peter Drucker, the moral in this story was clear: “In terms of technology, we have people trying to play it in 56 seconds, when it shouldn’t be played at all.” It is possible to tease out two further lessons from the young pianist’s misfortune - that speed is not an end in itself and that we need to make effective use of the technology

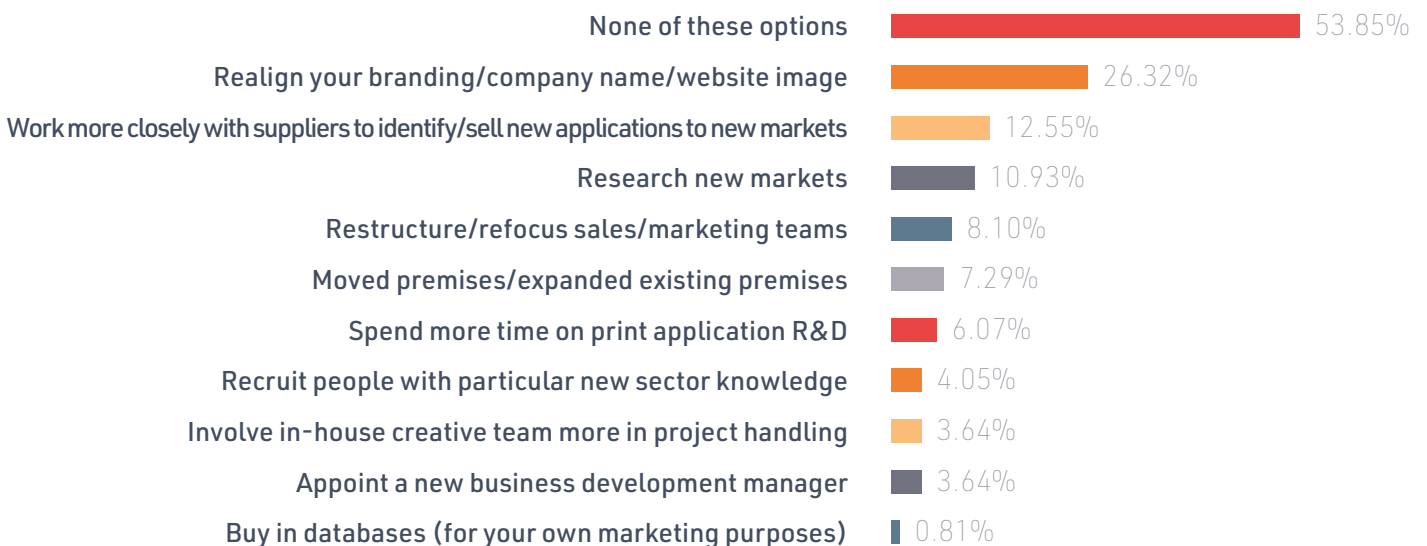
we have rather than constantly looking towards a new horizon.

That, in essence, appears to be what British wide-format companies have concluded as they formulate their investment plans for the next two years. The results of Image Reports’ 2019 Widthwise survey suggest they are less likely to invest in new printers than they were in 2018 and, for that matter, less

## Q16. Do you plan to innovate/add services in any of the following areas within the next year to meet customer demand?



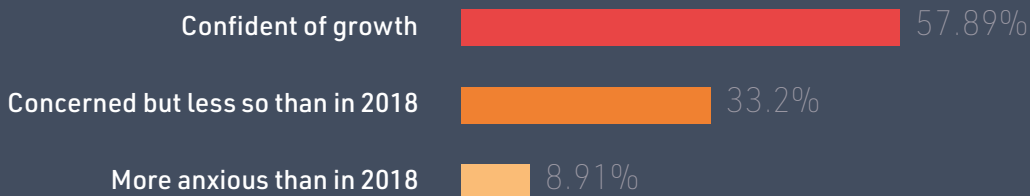
## Q21. Have you made any of the following strategic changes within the last year?



## Q22. Do you plan to make any of the following strategic changes in 2019?



## Q24. How do you feel about your business's prospects?



likely to invest in most other products too.

Newer, faster, shinier machines are always available, but the case for investment needs to be robust, and not driven by what Drucker called “bandwagon psychology”. In times of rapid, unsettling change, management fashions are a wonderful substitute for the hard work of thinking and it is too easy to follow the herd and, for example, buy a textile printer because a rival has invested in one; diversify into creative design out of fear that you might be left behind or think that a UV LED printer will automatically win you new business.

All these decisions might make sense, but they will not make sense for every print service provider. As Drucker pointed out, business is full of evangelists, many of them

consultants, who think their patent medicine provides an instant cure for everything but: “There is no universal medicine. The stuff that is good for my arthritis would not help me at all with a broken leg even though it’s in the same general area.” He suggested that the question that many managers need to ask, but find hard to, is: “Is this for us?”

Almost two out of three wide-format print companies surveyed agree that expanding their creative design capabilities is for them, while 44.1% of respondents are looking to offer print installation services. These sound like logical strategies for getting more work out of existing clients and, quite possibly, to strengthen your proposition to new ones. The popularity of creative

design still perplexes some traditionalists who are sceptical about printers’ ability to attract the right calibre of designer and get enough day-to-day work to deliver a return on their investment. Yet others argue that it has helped them develop new products and solutions for clients. Both arguments have their merits but it’s hard not to wonder whether, following Drucker’s argument, print service providers would do better at differentiating themselves by pursuing such options as Web-to-print. At present, that service is only on the agenda for 5.7% of printers.

If we take a broader view of investment as it affects the business as a whole, not just in machinery, wide-format printers are more focused on improving their brand (which

26.3% have done in the past year and 27.5% plan to do this year) than anything else. Working closely with suppliers to develop new applications remains a priority. It is encouraging, too, to see that 42% of print service providers are looking to innovate by investing in in-house R&D. Developing proprietary solutions for clients is one clear way of standing out from the competition and reducing reliance on that part of the market where wide-format print is a commodity that is judged purely on price per square metre.

Cost remains the prime concern for print buyers - 25.4% of respondents identified it as the most critical issue for their clients, while 25.0% said that quality was key. Speed of turnaround and service were important too, listed as the key customer priority by 21.3% and 17.1% respectively. Only 4.9% of respondents thought that them having the latest technology was regarded by clients as the most important issue. Interestingly given all the talk about partnership building, only the same proportion - 4.9% - of those completing the survey felt that working in partnership with/consulting clients was the

latter's main priority.

The question Drucker would probably ask is why print service providers think they know what their customers want. Apart from "bandwagon psychology", his other pet hate in management was tunnel vision. His advice? "The only way you can get outside information is to go out with your customers, get to know them. You still don't know the 75% of the market that aren't your customers, but at least you know a little bit." In his view, many managers who trained with - and understood - accounting data don't understand, or ask, what information they need to do their job. There is a wealth of data available today about the outside world - not least on social media - but managers need to understand what data is relevant to them, their business and their strategy.

The most intriguing statistic in the 2019 Widthwise survey - which doesn't really square with any of the other findings - is that four out of ten companies do not believe wide-format will be their core service in ten years time. It's hard to know what to make of that. Do they expect wide-format

print to disappear? The survey suggests not. Do they expect clients to take print services in-house? The pendulum on insourcing versus outsourcing print has swung back and forth over the past decade. Yet given the general mood of optimism the survey reveals, it doesn't seem that printers are particularly worried about developing a new core business during that time.

Investment is cyclical and, given the difficulty of gauging the impact of Brexit, it would seem sensible for British wide-format printers to be cautious about their spending plans. This shouldn't become an excuse for complacency.

Amazon founder Jeff Bezos, probably the most successful CEO of the past 25 years, insists that his managers always behave as if it is day one - the first day of the company's existence. Why does he think this is so important? As he told an interviewer once: "Because if it's not day one, it's day two: stasis, quickly followed by irrelevance." In a marketplace that is constantly being redefined by technology, that's not a bad mantra for print service providers to bear in mind.

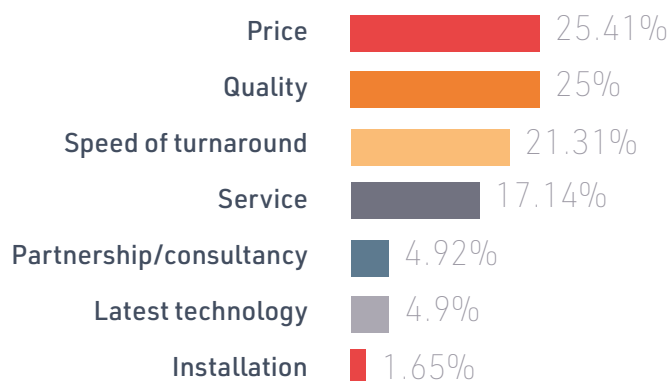
**Q25. In 2029, will large-format digital inkjet business still be your core business?**



**Q26. Do you invest in in-house research and development?**



**Q28. What do you think your clients' main priorities are?**





## Hybrid

Anapurna H1650i LED  
Anapurna H2050i LED  
Anapurna H2500i LED  
Anapurna H3200i LED



Jeti Tauro H2500 LED



Jeti Tauro H3300 LED



## Roll-To-Roll

Anapurna RTR3200i LED



Jeti Ceres RTR3200 LED



Avinci DX3200



## Flatbed

Anapurna FB2540i LED



Jeti Mira LED



Jeti Titan S/HS



## Workflow

Asanti



## Finishing

Acorta 3120



## Inks

Anapurna, Anuvia, Avinci



## Extreme Productivity. Extreme Quality.



Reach new heights in printing quality and productivity for all your inkjet signs and displays. Go beyond current printing standards and produce extremely vivid prints up to 453 m<sup>2</sup> per hour and up to 3.3 m wide. Choose from our vast array of presses and enter a new era of extreme productivity and extreme quality.

# A Fabric View

CMYUK talk about their passion for digital textile printing and the opportunities it offers large-format PSPs.

Thinking of getting into textile? You've seen the numbers, so why wouldn't you? To recap, a recent survey by Smithers Pira highlighted a predicted growth rate for digital textile printing at over 17.5% per annum over the next six years. In this period, the survey forecasts that the total available global market for digital textile printing will more than double from \$1.73bn in 2018 to \$3.6bn in 2023. That's a lot of opportunity - but where to begin? With CMYUK, is the obvious answer.

As the UK's largest independent supplier of large-format digital printers, cutting equipment and materials, CMYUK has been quick to recognise the potential of a burgeoning market - or to be more precise, markets plural - and has not only built up an impressive suite of hardware and materials offerings for those wanting to get involved, but has ensured it has the in-depth knowledge-base to help you make a seamless transition into the space.

CMYUK Group Director Robin East says: "We want people to recognise the opportunities afforded print companies by printing onto textile. To realise that it's not that difficult to get involved in. And to know that we can help them make the



transition successful. We have the ultimate equipment, materials, expertise and passion to help them benefit from what I truly believe has become the highest demand sector within digitally printed graphics."

Just as the digital disruption within the events and signage industry provided an efficient, speedy and sustainable solution for manufacturing, we are now witnessing the transformation of the printed textile sector via digital print technologies. To anyone involved in the trade, this growth has been evident for quite some time, encouraging a raft of independent print companies to develop solutions alongside the established, heavy-duty textile

print providers that are converting their plants from rotary screen printing to digital.

"Textile print covers so many possibilities," comments East. "For the large-format PSP, soft signage is an obvious choice because it allows them to target existing customers with a different product - one that resonates with so many of them, especially those public facing where sustainability is a key issue. The environmental merits of switching to textile printed graphics are a great sales tool!"

For the soft signage market, CMYUK offer the market leading 3.4m wide EFI VUTEk FabriVU 340 four-colour (CMYK) dye-sublimation printer - available as standard print direct to textile / or to transfer paper. Both require offline calendaring, which is why CMYUK also offers the renowned Klieverik machine.

Also now available is the FabriVU 340i, which has an inline calender. Users can turn off the inline fixation, which then allows the printer to run as aforementioned. Obviously when opting for the printer with inline fixation, users have the benefit of a single process that can increase the production throughput, mitigating the cost of an offline calender and larger equipment footprint.

It's worth noting that the market leading PONGS and Berger polyester soft signage materials, offered exclusively by CMYUK, have been colour profiled and calibrated for temperature and stretch,







delivering perfect quality and colour for the VUTEk FabriVU printers.

This business in a box offering covers the key applications required for soft signage:

- **Front-lit display** (used primarily for TFS - Tension Frame System)
- **Back-lit display** (used for lightbox applications)
- **Block-out/Black back** (used for exhibition/retail backdrop graphics requiring 'no show through')
- **Flag**
- **Stretch display** (used for pop-up display/exhibition graphics)

"Beyond soft signage though, there are a plethora of textile print applications and markets that can provide PSPs with growth and profit building potential," notes East. "Take the décor market for instance, where the path to customisation was first opened up by the extraordinary growth in demand for bespoke wallpapers/murals for domestic and contract use and has led to a multitude of bespoke print opportunities.

"For our stand at the recent Sign and Digital UK exhibition we collaborated with designer Hazel Carruthers to showcase décor possibilities. The reaction to that was exceptional, and points the way forward for new business opportunities for PSPs."

Running the EFI VUTEk FabriVU printers with paper transfer and offline

calendaring, their scope widens – dye-sublimation inks being suited to many décor and fashion products too. With dye-sublimation (paper transfer) there is no requirement for washing post print as the fabrics used generally have no coating. Some fabrics are also now available with inherent FR (meaning no post treatment to conform to BS standard).

EFI FabriVU printers aren't the only dye-sub machines in CMYUK's arsenal of course. Those interested in the décor market might also want to take a look at the Mimaki TS55-1800 and Mimaki TX300P-1800.

The 1.8m wide TS55-1800 paper sublimation only printer is the latest offering from Mimaki, offering high quality, high speed, printing with a range of options. A jumbo roll feed can be added, enabling loading of 2500 linear metre rolls of sublimation paper. A bulk ink system can be added to accommodate 10 litres of ink per colour (CMYK), also reducing the ink price p/l.

The 1.8m wide TX300P-1800 is a direct-to-textile printer only, offering the ability to run both dye sublimation and pigment inks (at the same time / for switch over), allowing users the flexibility of printing onto polyester materials with dye sublimation inks, and onto natural fabrics with pigmented inks.

And the digitally printed textile story doesn't end there. We've not even really mentioned garment/fashion/sportswear printing

yet... areas especially benefiting from the advances in polyester materials that now have the look and feel of natural fabrics.

The point is, if you are a PSP looking to re-invigorate your commercial offering, the growth of digital textile printing presents an unrivalled opportunity to bolt-on a profitable suite of products and services leveraging your existing production skills in prepress, colour management, digital printer operation and finishing.

"CMYUK is here to help you pull together the right kit, materials and know-how to generate a good return on investment in what promises to be a vibrant sector over the coming years," says East. "Come and see for yourself how we can help digitally printed textile dovetail with your current offering at our demo centre in Shrewsbury"



**Contact CMYUK**  
**T: 0118 989 2929**  
**E: sales@cmyuk.com**  
**www.cmyuk.com**  
**IG: @cmyuk\_ltd**

# The Findings: Technology

**E**very significant investment in technology is, fundamentally, a declaration of faith in the future of the business. At the moment, that faith is being severely tested by the innumerable complexities surrounding Brexit.

Across the UK, business investment fell for four consecutive quarters in 2018, the first time this has happened since the global economic crisis of 2008/09. The decline in investment is not enormous - British firms spent 2.5% less in the last quarter of 2018 than in the last quarter of 2017 - but it is significant and a telling indication of business sentiment.

The findings of the 2019 Widthwise survey suggest that the same pattern is impacting the

wide-format print sector. The industry hasn't quite - to borrow a aviation metaphor - adopted the brace position, but many print service providers are clearly taking stock, assessing risks and trying to minimise spending until the fog of confusion that is Brexit finally clears. (It doesn't help that no one has any idea when, if and how that will finally happen.)

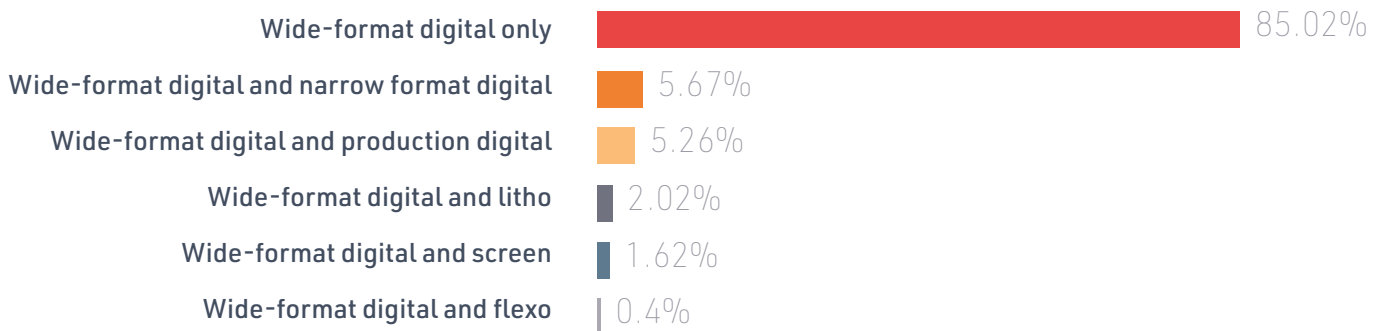
Every company's business is different - and for some, the need to press will still be paramount - but many owners of wide-format companies seem to have concluded that discretion is the better part of valour. It's not just that they are looking to invest less - in some cases, they're likely to spend nothing at all - they have also narrowed their focus in terms of what they are investing in. A new LED UV flatbed printer could make a substantial difference to

a business's performance. A shiny piece of new software? Mmm, they're thinking not so much.

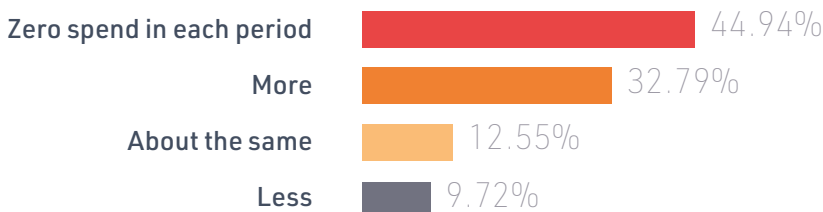
More than half of companies surveyed - 51.8% to be precise - do not expect to buy a new digital wide-format printer in the next two years, while 14.2% can't make their mind up. This is no great surprise because, as Peter Mayhew of Lightworks notes on pX of this report, the growth in wide-format technology spend slowed significantly in 2018. The Widthwise 2019 results suggest that printers are even more cautious about investing in other kinds of technology: a hefty 79.3% of respondents do not expect to spend anything on software or finishing equipment.

At the same time, many print service providers feel there is less incentive to invest because they feel that, in the past two years,

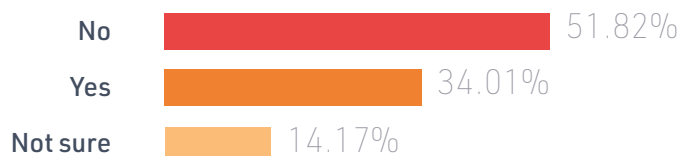
## Q30. What type of printers do you own?



## Q32. How much are you expecting to invest in new hardware/software across your business in 2019 compared to 2018?

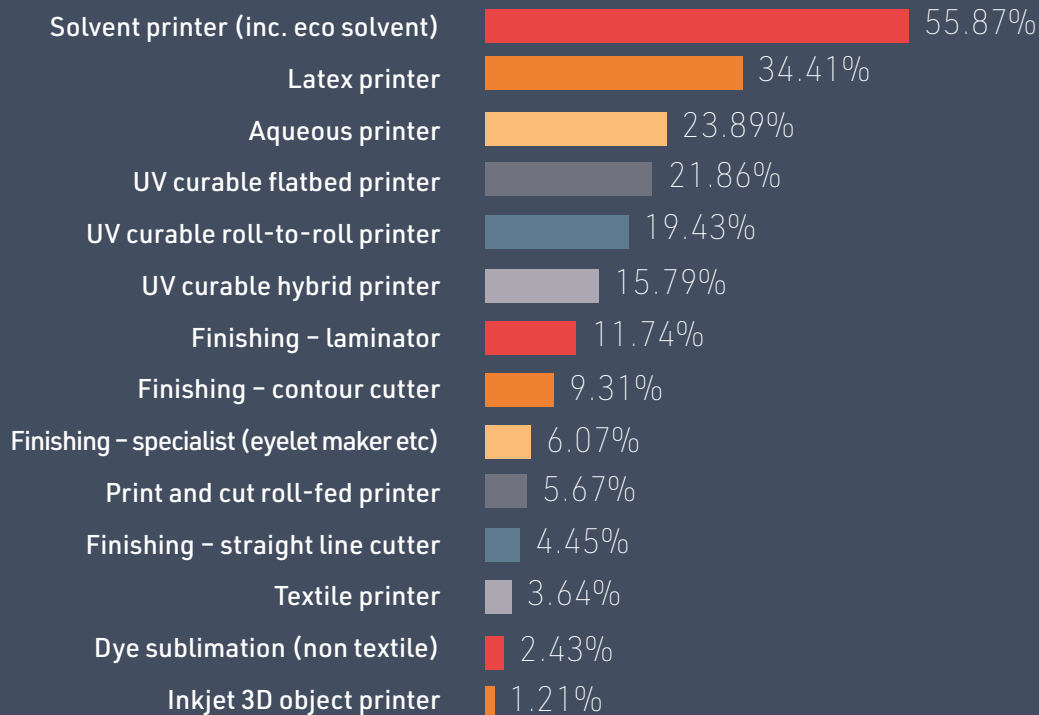


## Q33. Do you expect to buy a new digital wide-format printer in the next 2 years?

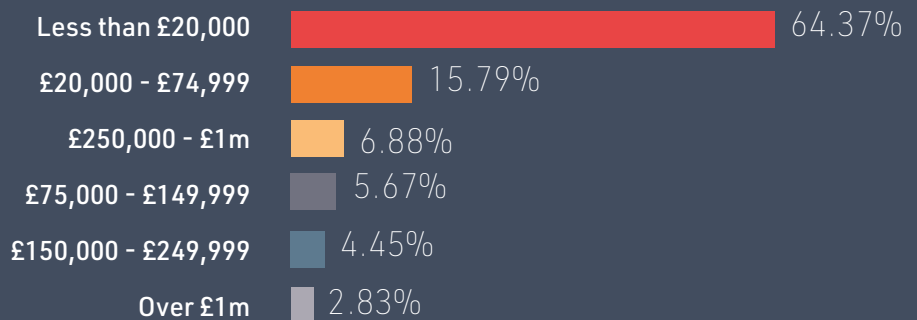




### Q31. What type of wide-format equipment do you own?



### Q36. In total, how much do you expect to invest in the wide-format technology altogether over the next 2 years?



technological advances in wide-format digital printers have been incremental, rather than transformational.

Even so, a third of respondents do plan to purchase a new printer and their preferences have shifted slightly since the 2018 report. There is much greater interest in UV curable flatbed printers (30.9% of those investing plan to buy one) and slightly less interest than last year in solvent printers (which 21.4% intend to buy). UV roll-to-roll printers and UV hybrid printers were also in demand. In terms of installed base, solvent remains the most popular option - 55.9% of print service providers have

one. This suggests that, despite environmental concerns, the industry's bread and butter work still involves solvent printers and vinyl substrates.

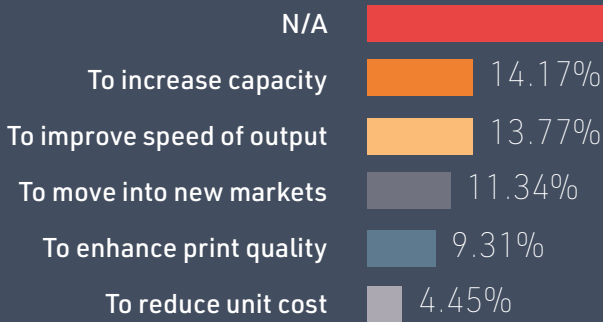
No other type of printer comes close to that although the findings suggest that many print service providers are running Latex, aqueous and UV curable flatbed printers. Versatile and economical, LED UV curable printers are attracting a lot of interest. That trend could well accelerate as the technology is still developing, with such innovations as clear coat varnish and white inks entering the marketplace.

Nearly two out of three companies planning

to invest expect to spend less than £20,000. Around one in ten are likely to spend in excess of £250,000. The most common rationale for investment is to expand capacity (a priority for 14.2%), print faster (13.8%) and to enhance quality (9.3%). Apart from new wide-format printers, the only other significant area of investment is in design software (of interest to 10.5% of respondents).

That means that, once again, the industry's interest in Web-to-print, VDP, management information systems and workflow software is negligible. Finishing is also a low priority - with only 3.2% expecting to invest in laminators.

Q37. What is the rationale behind your planned investment technology?



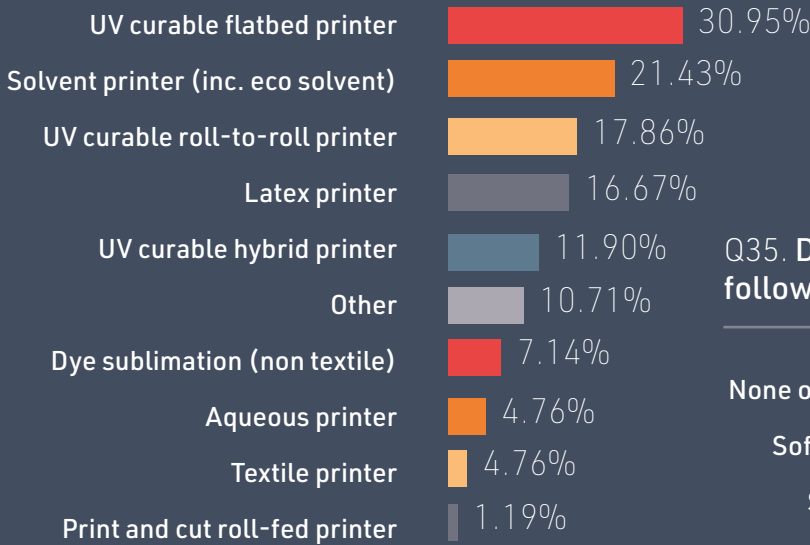
Q39. If no, do you plan to in 2019?



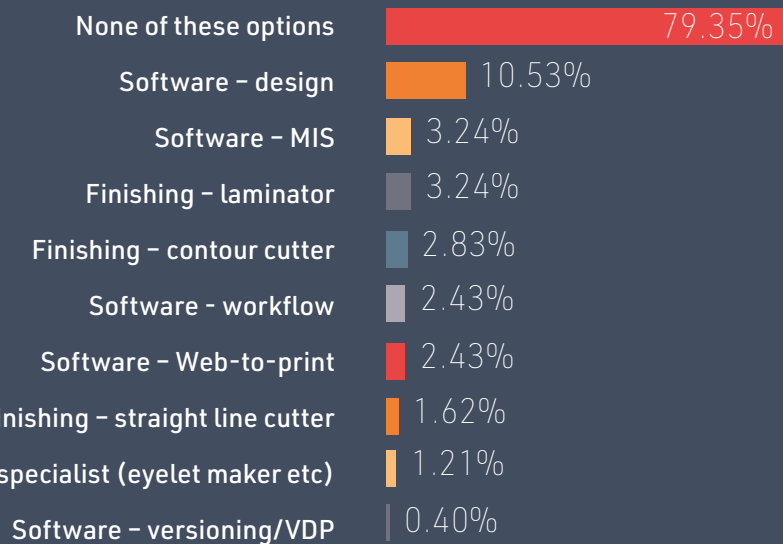
Q38. Have you invested in Industry 4.0 technology (e.g. the Internet of Things, artificial intelligence, workflow integration)



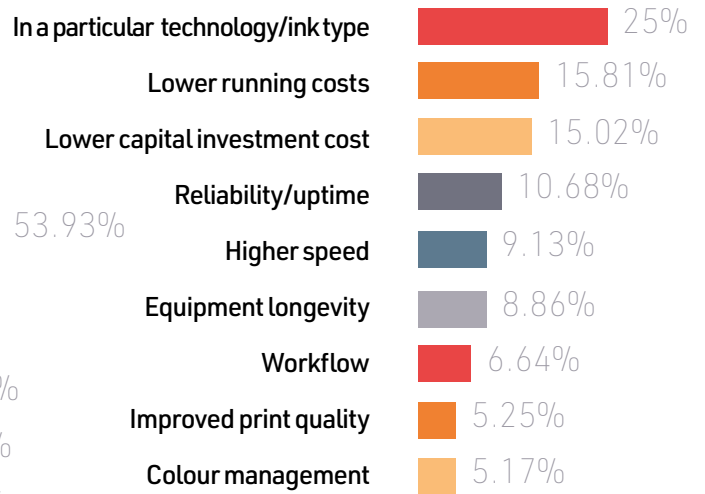
Q34. If yes, which type of digital wide-format printer do you expect to buy?



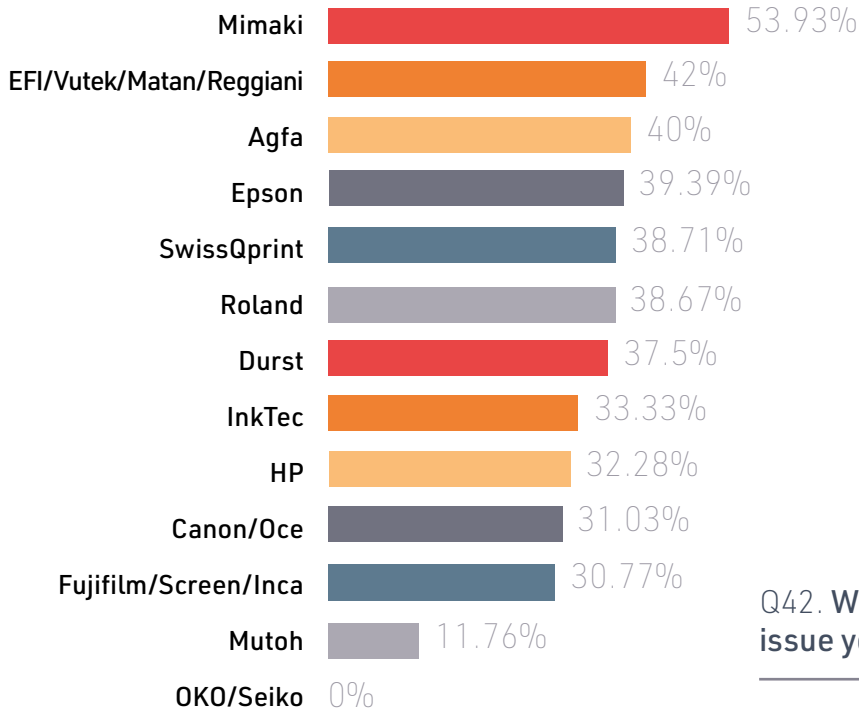
Q35. Do you expect to invest in any of the following for wide-format in the next 2 years?



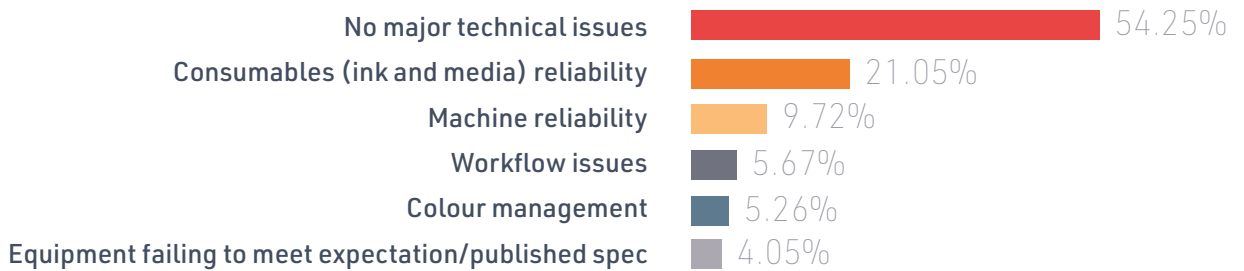
Q41. Where would you like to see more innovation in wide-format?



Q40. Which 3 large-format inkjet printer manufacturers do you consider the most innovative



Q42. What is the biggest technological issue you face in wide-format?



As far as seven out of ten British print service providers are concerned, the Internet of Things, let alone Industry 4.0, might as well not exist. There has been a slight increase in companies that have invested in emerging technologies - 5.3% this year, compared to 3.3% in 2018 - but no-one expects to spend any more on it in 2019. (To be fair, 31.2% say they haven't made their mind up yet.)

As industry stalwart Peter Kiddell told Image Reports, ignoring Industry 4.0 is like not using the internet because it is disruptive. Many printers, he says, just don't understand why it is relevant to them. "There is too much focus on the next bit of kit coming along," Kiddell said. "A much better

strategy would be to look at what you want to achieve as a business and look across the whole technological landscape to see how to develop your operation."

The ability to visualise how a new machine would perform in their workspace, to track production digitally as well as actually and use AI to manage parts of the production process - which will all come with Industry 4.0 - are hardly insignificant benefits for wide-format print companies. As Kiddell noted, they also have the IT and technological nous to adapt to the Internet of Things quickly and easily.

It may just be that Industry 4.0 sounds complicated, amorphous and expensive. The timeline for developments is also unclear.

For these reasons, many managers would rather spend what money they do have elsewhere. That is perfectly understandable although print service providers which refuse to take their blinkers off may find themselves, five years from now, at a serious competitive disadvantage.

If the British wide-format sector was granted three wishes by suppliers, it would ask them to make machines that are cheaper to run, cheaper to buy and last longer. Those priorities say a lot about the industry's state of mind. Faced with the greatest economic uncertainty since the 1970s, many British print service providers are heeding the old military adage: "Keep your powder dry."

# Roland DG Creating Opportunities with Wide Format UV Printing



**N**o two print businesses are the same. None would call themselves straightforward: every operation has their own specialism, their own unique requirements to meet, and their own issues to overcome. Even print professionals who focus on what they might call the everyday work of graphics production have a distinct set of circumstances. Others, meanwhile, have very niche needs indeed.

Roland developed the VersaUV S-Series to be the perfect solution for businesses with specific challenges. Not to be a jack of all trades and master of none, but a machine leading the field in every respect: quality of print, range of compatible sub-

strates, colour and texture – the ultimate in versatility, in short, that allows businesses across myriad facets of the print sector to produce optimum output.

The VersaUV S-Series builds on the success of the established VersaUV family of UV printers and super-sizes it. Like the VersaUV LEJ hybrid UV flatbed printer and VersaUV LEC UV printer/cutter series is a fantastic solution for sign-makers and speciality graphics producers, while fans of the benchtop VersaUV LEF series will recognise its ability to add creative customisation to a vast range of materials and 3D objects.

The VersaUV S-Series UV-LED is available as a flatbed printer in two bed widths and three bed lengths, and as a belt printer in two belt width and two belt length

options. Every model can print rigid and flexible substrates and objects up to 200mm in height, 100kg/sqm in weight and generous lengths and widths, meaning that it's possible to direct-print to more materials than ever before. There's an ideal VersaUV S-Series for every user – and a feature to meet every need.

For instance, in 2018 packaging sector leader ASG Spark upgraded to a VersaUV S-Series UV-LED belt printer to improve the quality of its print. The UK-based company ASG Spark provides services and solutions for major brands in the fields of beauty, home electronics, home entertainment, gaming, wines and spirits and more, and invested in the S-Series specifically to create fully detailed scale models of large POS displays.





Upon installation, the prepress and systems team found the detail and quality achievable on the S-Series was as good as production and therefore perfect for creating packaging mock-ups, including those with special effects with textural coatings, and could print directly to boxes, dramatically changing up the workflow. The speed and quality accelerated turnaround times, improving customer relationships and maintaining ASG Spark's core business – while helping the company adapt to new markets and demands too: the S-Series can print onto any substrate the business wants, from laminated metallic boards to golf balls, all in superior quality.

Meanwhile, the VersaUV S-Series grabbed the attention of Genesis Marketing & Events for its flexibility and compatibility with an extraordinary range of substrates – even very large and heavy items like wooden doors. Initially the UV-LED belt printer's direct-to-substrate capability accelerated the production of signage boards, as the team no longer had to print onto and apply self-adhesive vinyl, but it has since successfully achieved fantastic results printing directly onto a variety of different substrates including leather, wood, MDF,

glass, plastic, canvas and ceramic tiles.

Genesis Marketing & Events' clients include historical public buildings such as the National Museum of Wales and Cardiff Castle – where it has used the S-Series to add branding directly to bistro table tops – while the business is also moving into new applications like customised window graphics, which is made possible thanks to the S-Series system's white ink and great compatibility with flexible, heat-sensitive films. In addition, the S-Series will allow Genesis Marketing & Events to bring more work in-house that was formerly outsourced, for example printing Braille on signage – achievable by printing gloss varnish in layers to build up intricate 3D textures. The outstanding variety of materials that be combined with VersaUV S-Series technology means Genesis Marketing & Events is looking forward to trying a host of new applications.

Conversely, The Sign Shed chose its VersaUV S-Series belt model for one main application – health and safety signage – but to make its manufacturing processes faster and more productive. Like Genesis Marketing & Events, The Sign Shed previously printed graphics and letters onto vinyl for

manual application onto signage materials – a lengthy process now eliminated thanks to the S-Series' ability to direct-print vibrant CMYK, sharp white and gloss onto standard sign substrates such as Foamex, Corex, composite aluminium and rigid plastics. The addition of the new S-Series at The Sign Shed has reduced manufacturing times by three-quarters, an incredible acceleration that meets its customers' strict demands. This increase in speed is paired with the highest quality output, for which clients are happy to pay and can be proud to display.

There are many more businesses who have discovered the exceptional features of the VersaUV S-Series and how they can meet unique needs – and reveal niches previously not considered. Like all Roland printers it delivers outstanding colours and sharp prints, providing accuracy for text, images, photographs and complex designs, while also opening the creative door for textural elements and special effects thanks to its gloss ink.

As The Sign Shed has discovered it is suitable for Braille and tactile signage, and can be put to work creating textured packaging designs as used by ASG Spark, but this feature is also ideal for fashion, homewares, gifts, musical equipment and more. Imagine a snakeskin effect on a faux leather handbag, a paintbrush finish on canvas artwork, realistic water droplets on a plastic phone case, high-shine highlights on a set of speakers – and much more. Users are still only scratching the surface of what is possible.

Furthermore, the machine is large-scale yet delicate: its low-temperature UV-LED lamps are cool enough to be used with heat-sensitive items such as electronic devices and shrink-wrap for packaging; the ink sits on top of the material rather than penetrates it, making the system suitable for even fragile items; and its ozone-free UV inks don't necessitate additional ventilation. And, despite its size – you really can print an entire door in one piece – it's been designed to be space-efficient and can fit into most standard work environments.

There are almost as many printers on the market as there are types of businesses to buy them. But every business is unique, with a specific set of challenges. That's why Roland developed the VersaUV Series in a range of configurations and sizes, with a host of exciting features, that don't just solve problems – they create new opportunities.

[www.rolanddg.co.uk](http://www.rolanddg.co.uk)

# The Findings: Environment

**T**he best way to summarise the environmental findings of the 2019 Image Reports Widthwise survey is to quote the baseball manager Yogi Berra's most famous remark: "It's déjà vu all over again." here are, as in every year this report has been published, signs that the industry (and its customers) are making progress on sustainability. At the same time, it is clear that a minority of printers and print buyers are resolutely refusing to be bothered by all the fuss. Although there has been a significant increase in the proportion

of printers with environmental credentials, the other 2019 findings do not suggest that the industry - or its customers - has had a Damascus conversion and is fully committed to the cause.

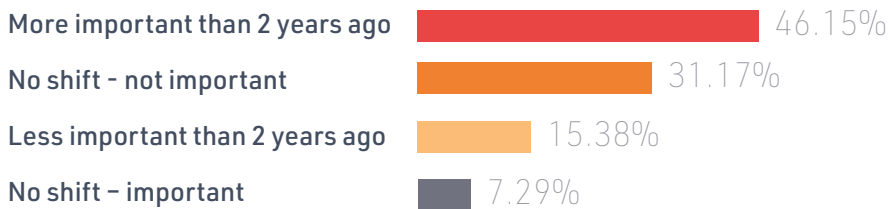
The proportion of British print service providers who say it has become more important to offer 'green' printing options stands at 46.1%, a slight increase on the 45.0% who thought as much in 2018. That said, almost one in three said there was no need to provide environmentally friendly options!

You can understand the scepticism. Although the percentage of wide-format printers saying customers never ask

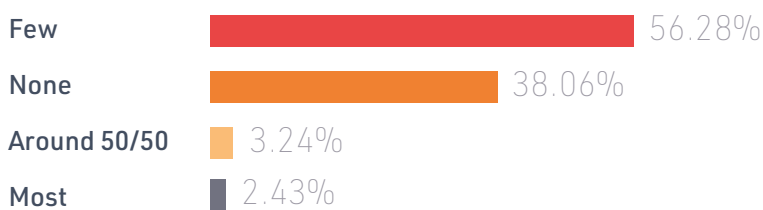
about environmental accreditations has plummeted from more than 70% in 2018 to 38.1% this year, 56.3% say only a few clients bother to enquire. Print buyers' concerns are obviously going to vary depending on the status of the business and the sector it is in - publicly-quoted companies in retail or fashion are much more likely to focus on sustainability - but even so, these results suggest that, at many businesses that buy wide-format or digital print, inaction speaks louder than words.

So rather than managing their environmental risks, many print buyers seem to prefer to ignore them. It is hard to say whether this attitude is driven by

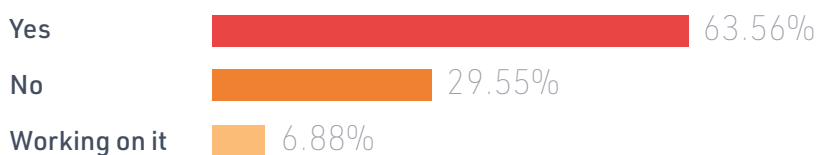
## Q43. How important is it to offer 'green' print options?



## Q44. Do clients ask for your environmental credentials or ask for your sustainability plans?



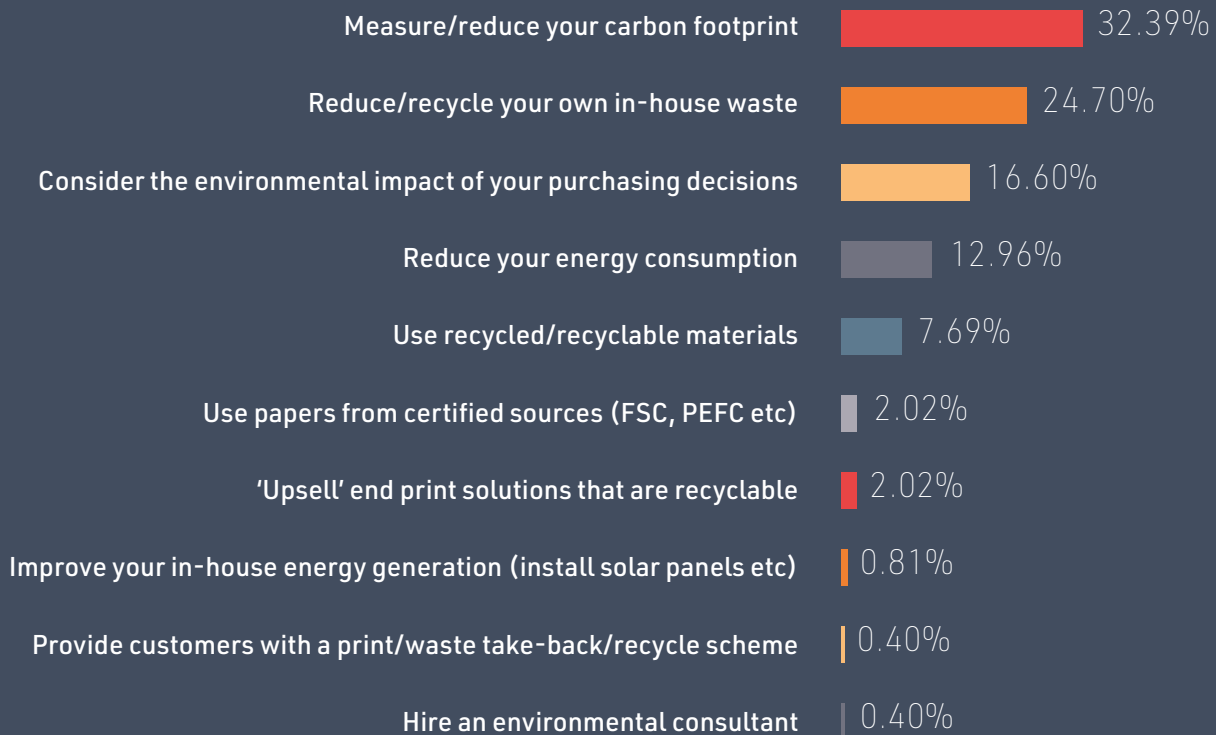
## Q45. Do you have environmental accreditations?



### Q46. Do you expect clients to reduce or withdraw business because print is increasingly seen as environmentally unfriendly in comparison to other options?



### Q47. What is your major environmental focus for 2019



ignorance, apathy or a suspicion that sustainability will increase unit costs. Sir David Attenborough's exposure of the devastating level of plastic pollution in our oceans in 'The Blue Planet 2' illustrates the perils of this approach. In the courtroom of world opinion, with trust in business almost as low as the public's faith in politicians, and outrage fanned by emotive posts on social media, judgements on such matters are rendered instantly. Attenborough's intervention prompted a panicky, undignified scramble among consumer goods giants to disassociate themselves from toxic

plastic as quickly as possible.

The good news is that at least most British print service providers are ready when such storms blow up. Almost two out of three say they already have environmental accreditation and 6.9% are working on it. This is an emphatic shift from 2018 - when only 39.1% of respondents said they had accreditation - and yet, the industry's environmental priorities make you wonder how much has changed. The most urgent task for 32.4% of printers, is to measure and reduce their carbon footprint. (The comparative figure in 2018 was 38.4%.) Reducing and

recycling in-house waste and consuming less energy were near the top of the industry's environmental agenda.

The most encouraging finding - for those who believe that the British wide-format industry has to become greener to thrive and prosper - is that just over one in seven print service providers said they consider the environmental impact of their purchasing decisions. This is backed up by anecdotal evidence of some printers opting for water-based inks and reduce their use of Volatile Organic Compounds in the press room. Things are changing, but are they changing fast enough?

# Supporting Design, Creativity and Innovation

Antalis looks at changes and trends in the large format market and the new opportunities these can offer to large format digital printers.

The large format digital inkjet print market offers opportunities as new demands, trends and, increasingly, new sectors look to take advantage of the capabilities of this technology. The growth is being aided by new media as more sustainable options become available. New sectors, personalisation and end uses are providing further opportunities for large format print businesses.

A great example is the increase in digitally printed textiles, particularly in the interior sector, with the market set to grow to €4.9bn (£4.22bn) in 2023, according to new research from Smithers Pira. Data from a new report, *The Future of Digital Textile Printing to 2023*, shows that in 2018 the global value in this market reached €2.83bn. This equates to 2.17 billion square metres of fabrics printed by wide format inkjet printing.

So how are media suppliers reacting to this development and the growing need for new media, personalisation and new end applications?

## Collaboration throughout the design journey

Claire White, Innovation & Creative Consultant for Antalis Visual Communications,

explains how Antalis is engaging with its clients at an early stage to aid the specification process - encouraging both printers and designers to look at different ways to use media for all types of projects, from branding to interior design and even construction.

Antalis has a far reaching media selection with a wide portfolio of products for all types of large format applications. "Finding the perfect media partner is a collaborative approach and one where Antalis tries to truly understand the objectives from the initial planning stage, so we can support the project with the best use of substrates", said Claire.

Claire goes on to explain "We work with clients to consider everything from how to target customers, what messages they want to convey in their visual communications, how to create a point of difference or an experience that will help the audience engage and connect with the finished design.

Considering the media is, of course, a key part of this process it should reflect the personality of the brand or design. For example, a brand with a strong emphasis on natural-based products would want a more sustainable media solution. Colour, texture and finish are all critical ways to communicate and will have an impact on the finished result. The target is to ensure the display represents your brand and its personality,

evoking engagement and even emotion throughout the design."

"There are lots of different examples of fantastic media choices for wide format - they all help create an experience in a physical environment, helping retailers, for example, stand out on the high street, something that digital communication channels just cannot achieve," concludes Claire.

## Meeting future demands

The trend in the market to create bespoke, personalised interiors, within both commercial and residential markets, continues to grow giving new opportunities for wide format printers. As the Smithers Pira new report highlights.

Antalis is also seeing this increasing desire for textile media that can provide both the scope and quality printers need to tap into the growing interior design market and has extended its textile range, launching new Coala Textiles, a range of polyester printable textiles for signage and decoration to complement its existing Coala WallDesign range.

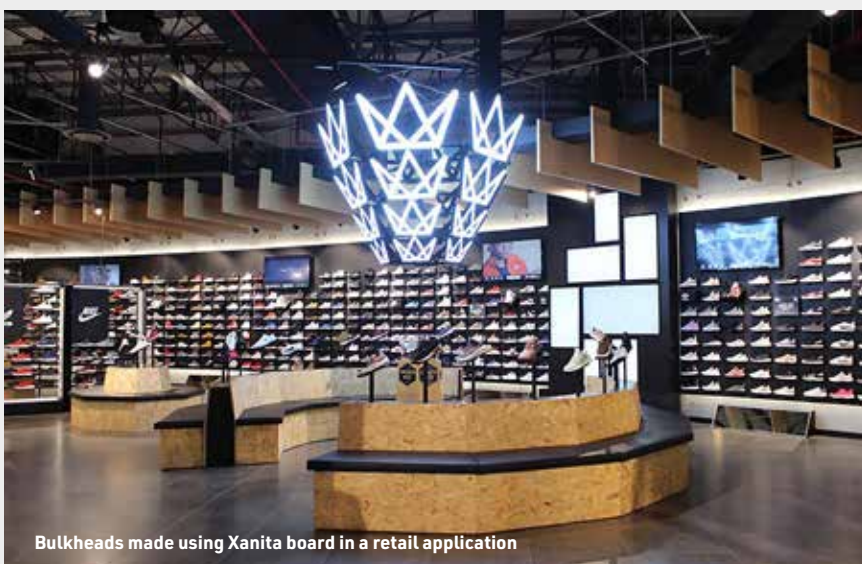
Textile products have great versatility and, as they are 100% polyester, they are a more environmentally-friendly alternative to traditional PVC materials. Textile ranges available include products for a large variety of applications, including frontlit and stretch displays, vibrant backlit displays, acoustic dampening, and indoor/outdoor blinds.

"The new trends and increasing use of textiles is really enabling large format printers, both specialists and commercial printers, to diversify their offering, to capitalise on the growing opportunities presented by the interior design market," said Claire.

Textiles are being used for a range of applications from traditional POS, wall coverings, exhibitions to new architectural and geometric applications, with sound absorbing semi-sheer fabric which are particularly interesting for use within public buildings and workplaces.

## New market opportunities

Another move noted by Antalis is the convergence of market sectors with new media



Bulkheads made using Xanita board in a retail application





New Coala digital textiles range

opening up brand new applications and end uses for large format production.

“Xanita board, is a great example of how a board that may have been traditionally associated with POS, exhibition etc is now crossing the boundaries of conventional usage,” said Claire

Xanita is made from 100% post-consumer kraft in the core and is fully recyclable. It presents a real opportunity for printers to explore new markets that make use of structural applications that they can produce with their existing equipment. These markets offer significantly better margins for players in an industry with ever-increasing margin competition. They also present additional revenue streams without the need for significant capital outlay. By simply working with a new substrate such as Xanita board, printers gain the ability to move from a flat two-dimensional starting point and finish off with a three-dimensional, even load-bearing structure - which opens up a world of possibilities. These possibilities are most notable in the event & exhibitions and shop fitting industries. The ability to direct print, cnc cut, ship flat-packed and significantly reduce structure weight, play into a series of advantages that printers have over traditional suppliers

that they might not even be aware of. For example, a sheet of Xanita board, directly printed with a wood grain, cut and folded resembles a wooden beam. The consumer is unlikely to know the difference between a well-printed, well-converted piece of Xanita board and the real thing. The end-to-end cost and installation differences between real materials such as wood, widely used substitutes such as MDF, and substrates like Xanita board, are significant.

#### Recognising originality and creativity – AIDA awards

Antalis’ belief in a collaborative approach to new developments and design trends is demonstrated in its very own Antalis Interior Design Awards (AIDA), which was launched in 2017 to recognise and reward great design and print. In its first year, AIDA was a huge success with 341 submitted projects covering home interiors, retail, hotels, public premises, offices and restaurants, as well as 3D projects on scale models in white. Antalis is delighted to announce that it will be running the awards in 2019 to recognise, once again, the creativity and talent of interior design agencies, architectural firms and printers from across all sectors.

#### In conclusion

The only real question is; if a substrate will allow you to open up a world of new business opportunities, do you embrace it? Or do you take your chances in the ‘safety’ of your comfort zone? Whatever your decision Antalis is certainly well positioned to assist and advise you – to help you embrace any new opportunities that may lie ahead.

[www.antalis.co.uk](http://www.antalis.co.uk)



Claire White - Innovation & Creative Consultant, Antalis

antalis <sup>EM</sup>  
Just ask Antalis



# The Findings: A global view

A look at the 2018 data collected by consultancy Lightwords from printer manufacturers, ink suppliers, paper mills and vinyl producers and more. Peter Mayhew analysis the meaning behind the numbers.

Lightwords is a focused research company providing custom and bespoke analysis of nearly every segment of the printing market. To do this, our team of industry-experienced analysts use primary research studies, shipment data and industry connections to develop market insights. Our clients range from manufacturers of printers, inks and media to channel distributors, dealers and service providers.

Our analysts collate data from a variety of sources, including shipment numbers from manufacturers themselves. We use this to track product segments and applications, while applying our proprietary algorithms to forecast markets looking forward. We work in virtually all printing segments including wide format printing and applications, commercial printing and, office copier/printer markets.

We also conduct competitive pricing analysis based on a unique and proprietary data-collection methodology. All the data we collect is processed, analysed and interpreted into meaningful insights to support our clients' decision-making processes.

To understand the UK wide-format market, it's first necessary to look at just how many printers were added or retired during 2018 before you can reach any conclusions about its relative health. Last year Lightwords estimates that the number of wide-format printers in the UK market grew by 240 units, as new installations slightly outpaced retirements of older units.

We estimate that the total value of UK wide-format printers, media and ink reached approximately £763m in 2018. This figure has risen for the last few years as new markets open and established applications continue to

grow. However, the growth rate has weakened considerably compared to what we saw in 2017. Established service providers have shown that they have more than enough production capacity to enable them to move into new application areas. As a result, there was limited demand for new printers in 2018.

Overall, just over 9,000 wide-format printers were sold across the UK and Ireland in the past year. Again, most of these sales were CAD models. Architects, engineers and construction companies are the principal buyers for these printers. However, the UK construction industry is currently in a flat market cycle with only a few pockets of growth.

Even limited growth prospects continue to attract the attention of major manufacturers. For example, Canon introduced its new TX Series of printers and scanners while HP saw success with its XL Pagewide products. Océ also introduced new Colorwave models, two of which feature multi-roll feed systems, a feature that is critical for many design offices.

Housebuilding continues to drive the CAD market in the UK but it's a slowing sector. In 2018 the UK CAD market remained relatively stable. Looking ahead, delays in commencing large infrastructure projects such as the North-South, High Speed Rail Link (HS2) and, postponed decisions to begin work on new UK energy programmes are causing concern about the future health of the UK CAD market. On a positive note, ink consumption in the CAD market is healthy and OEM brand loyalty remains strong among CAD users.

In the 2018 graphics market, installations of aqueous wide-format inkjet printers continued their slow decline. We also note that aqueous graphics work continues to migrate to eco-solvent, latex and now, roll-to-roll LED

UV curable printers.

However, there are still many UK service providers that operate fleets of wide-format aqueous in jet printers producing personalised indoor applications such as canvas prints, photography and fine art output for both consumer and professional markets. Due to their considerable investment in aqueous printing technology, these PSPs remain unlikely to adopt another ink technology anytime soon. In fact, UK aqueous wide-format graphics printers are working harder than ever, printing 1.3m square metres more of media in 2018 than in 2017.

For Canon, this was the first full year of shipments of the imagePrograf Pro printer range and the company made considerable progress establishing these products within the UK photo community. Meanwhile, HP's Z series printer models recorded solid shipment volumes at a time when innovation in this market segment has likely peaked.

Although demand for solvent printers is slowing due to concerns about ink safety, the core benefit of print durability is sustaining demand for eco-solvent offerings. In this segment, unit sales of eco-solvent printers grew by 13% in 2018 versus 2017. This was driven mainly by commercial printers and service providers adding applications such as exhibition displays and personalised banners for local businesses as part of an integrated marketing campaign.

While some new print service providers are choosing eco-solvent ink-technology, others in the UK market are taking notice of the versatility of UV curable and Latex options. Overall consumption of banner and scrim media produced by solvent and eco-solvent wide-format printers declined by 600,000m<sup>2</sup> compared to 2017, with sales of just under 68m

| Company                          | April 14/15 Financial Year |                | April 15/16 Financial Year |                |                      | April 16/17 Financial Year |                |                      | April 17/18 Financial Year |                |                      |
|----------------------------------|----------------------------|----------------|----------------------------|----------------|----------------------|----------------------------|----------------|----------------------|----------------------------|----------------|----------------------|
|                                  | Accounting Year End        | Turnover (£'s) | Accounting Year End        | Turnover (£'s) | % Change 14/15-15/16 | Accounting Year End        | Turnover (£'s) | % Change 15/16-16/17 | Accounting Year End        | Turnover (£'s) | % Change 16/17-17/18 |
| SPANDEX LIMITED                  | 4/30/15                    | £35,800,000    | 4/30/16                    | £40,895,000    | 12.5%                | 4/30/17                    | £43,548,000    | 6.1%                 | 4/30/18                    | £43,347,000    | -0.5%                |
| ART SYSTEMS HOLDINGS LIMITED     | 12/31/14                   | £30,481,829    | 12/31/15                   | £30,717,845    | 0.8%                 | 12/31/16                   | £31,950,463    | 3.9%                 | 12/31/17                   | £34,758,393    | 8.1%                 |
| METAMARK (UK) LIMITED            | 3/31/15                    | £23,948,278    | 3/31/16                    | £26,053,474    | 8.1%                 | 3/31/17                    | £29,348,962    | 11.2%                | 3/31/18                    | £31,014,000    | 5.4%                 |
| PAPERGRAPHICS LIMITED            | 12/31/14                   | £16,601,250    | 12/31/15                   | £17,525,472    | 5.3%                 | 12/31/16                   | £25,432,837    | 31.1%                | 12/31/17                   | £25,797,000    | 1.4%                 |
| PERFECT COLOURS LIMITED          | 8/31/14                    | £15,363,982    | 8/31/15                    | £18,252,151    | 15.8%                | 31/12/2016*                | £30,146,788    | n/a                  | 12/31/17                   | £19,360,836    | n/a                  |
| STANFORD MARSH LIMITED           | 1/31/15                    | £14,195,236    | 1/31/16                    | £14,542,440    | 2.4%                 | 1/31/17                    | £15,104,121    | 3.7%                 | 1/31/18                    | £18,746,000    | 19.4%                |
| HYBRID SERVICES LIMITED          | 31/09/2014                 | £13,520,130    | 31/09/2015                 | £15,263,860    | 11.4%                | 31/09/2016                 | £15,779,686    | 3.3%                 | 9/30/17                    | £16,859,015    | 6.4%                 |
| LITHO SUPPLIES (UK) LIMITED      | 12/31/14                   | £14,690,559    | 12/31/15                   | £17,528,445    | 16.2%                | 12/31/16                   | £17,128,573    | -2.3%                | 12/31/17                   | £16,779,143    | -2.1%                |
| WILLIAM SMITH GROUP 1832 LIMITED | 3/31/15                    | £16,297,343    | 3/31/16                    | £15,942,043    | -2.2%                | 3/31/17                    | £16,557,841    | 3.7%                 | 3/31/18                    | £16,456,803    | -0.6%                |
| ALLPRINT SUPPLIES LIMITED        | 12/31/14                   | £11,049,297    | 12/31/15                   | £13,058,867    | 15.4%                | 12/31/16                   | £14,770,676    | 11.6%                | 12/31/17                   | £16,109,404    | 8.3%                 |

Figure 1

square metres in 2018. Despite the downturn in the total number of solvent and eco-solvent printer installations, Epson's SureColor S range expanded its number of UK installations in 2018. Customers are particularly attracted to the wide range of applications capable of being produced on these printers.

It was a rather more complicated situation in the UK for Latex ink technology in 2018. Sales of latex ink-based printers were roughly unchanged from 2017 and unit sales remain smaller than the combined sales of solvent and eco-solvent printers. HP is the major brand for Latex ink technology, which is now firmly established in the UK market. While there is competition from other Latex ink technology vendors, HP's print and cut promotions helped the company maintain its latex market dominance.

During the second half of the year HP started shipping its new R1000 and R2000 flatbed latex printers in the UK and Ireland. Although HP finished the year with less than a dozen installations of these models, this should be considered a good start for a new production technology segment.

For the entire UK market, total revenue from the sale of Latex Ink and media supplies grew by a healthy rate of 10% in 2018. Lightwords estimates that installed Latex printers in the UK and Ireland accounted for the use of more than 20m square metres of media in 2018. The technology continues to grow in popularity for both indoor and outdoor applications especially where environmental concerns are high.

Another success story in the UK for 2018 must be in the UV curable market, where there was strong demand for LED UV curable wide-format printers. Unit sales were up almost 8% versus 2017, generating an additional £4m of hardware sales from this segment. UV curable media sales also reached a new record of 55m square metres in 2018, a 10% increase compared with 2017.

LED UV curing continues to be the technology segment to watch going forward. It also continues to innovate with white inks

and clear coat varnish now available. New printer prices for LED UV curing models are falling in both the roll-to-roll and flatbed segments and these are challenging even established eco-solvent products.

Meanwhile, increasing ink durability and flexibility continues to drive the acceptance of UV cured output in new applications areas. These include direct printing on glass and tile as well as vehicle graphics and soft signage.

Much has been written about textile printing from a sign and display perspective. But UK demand for dye-sublimation paper remained relatively flat in 2018 compared to 2017. The reasons for the lack of growth in 2018 are complicated but, Lightwords believes that many backlit displays, flags and banners that were previously produced on aqueous, solvent or UV curable printers are now being printed with dye-sublimation technology. Further, many sites where these applications are displayed have been modified to accept only textile media meaning that, the volume of printed media required to replenish these displays is now stabilising at current levels.

But do not expect it to stay this way. HP have the textile market in its sights and is looking to disrupt it. Supplying manufacturers in the UK's expanding sportswear and leisure sector could be an interesting new opportunity for UK PSP's.

Even more interesting is the direct-to-textile print market, which grew by approximately 15% in 2018. This added new sales of 4m square metres to the total of direct printed media in 2018. While we may not see this momentum continue in the UK, it may be a good reason for PSP's to look at this segment more seriously. There are compelling reasons (personalisation, decor market growth, shortening supply chains, etc.) and lots of volume in India and the Far East that is prime for repatriation back to the UK making this a good vertical market opportunity for anyone who understands digital printing technology and its techniques.

To round up the UK revenue numbers, Lightwords estimates that the total wide-for-

mat print market - including hardware, media and ink - grew by approximately 14% in 2018 to reach a total of £763m. Most of this growth came from the sale of media and ink. In fact, ink sales alone account for about 23% of total wide-format revenue in the UK market and it continues to be a high margin business for a limited number of players.

Let's now look at those players whose business it is to get these products to end users and, the service providers who also add considerable value. Figure 1 lists the sales performance over the last five years of ten of the UK's most well-known wide-format distributors.

Many of our ten selected reseller companies enjoyed higher revenues in 2018 when compared to 2017. Digging further into their results reveals that many had also focused on increasing profitability and had successfully achieved this goal. Interestingly, those with growth do have some business from the European Union and all highlight risks from this business in light of the uncertainty due to Brexit. Others highlight moves into new businesses by acquisition or adding product ranges such as, 3D printing or own-brand products to support their growth and mitigate future liabilities.

Figure 2 illustrates the sales performance of ten top-performing print service providers over the past five years. Mid-sized service providers with under £25m in sales in 2018 had lower sales compared to the previous year. These companies generally cite bad debt problems, reorganisation costs and the decline of the UK retail sector as the primary reasons for their lower revenues.

In contrast, many large, successful PSP's have diversified their businesses by adding design services, acquiring smaller competitors or, investing in new machinery. Not surprisingly, the Brexit word can also be found as a risk factor for many of these companies.

At Lightwords, our view is that it is those mid-sized PSP's in the UK market who face the greatest risk in 2019. They must therefore focus, most acutely, on their customers, competition and the re-invention of their businesses.

Figure 2

| Company                               | April 14/15 Financial Year |                | April 15/16 Financial Year |                |                      | April 16/17 Financial Year |                |                      | April 17/18 Financial Year |                |                      |
|---------------------------------------|----------------------------|----------------|----------------------------|----------------|----------------------|----------------------------|----------------|----------------------|----------------------------|----------------|----------------------|
|                                       | Accounting Year End        | Turnover (£'s) | Accounting Year End        | Turnover (£'s) | % Change 14/15-15/16 | Accounting Year End        | Turnover (£'s) | % Change 15/16-16/17 | Accounting Year End        | Turnover (£'s) | % Change 16/17-17/18 |
| Inspired Thinking Group (ITG) Limited | 8/31/16                    | £60,981,709    | 8/31/16                    | £75,838,000    | 19.6%                | 8/31/17                    | £82,141,000    | 7.7%                 | 8/31/18                    | £91,003,000    | 9.7%                 |
| Delta Display Holdings Limited        | 12/31/14                   | £65,639,950    | 12/31/15                   | £66,873,329    | 1.8%                 | 12/31/16                   | £69,962,841    | 4.4%                 | 12/31/17                   | £81,025,185    | 13.7%                |
| Augustus Martin Limited               | 3/31/15                    | £56,902,039    | 3/31/16                    | £50,017,775    | -13.8%               | 3/31/17                    | £42,126,604    | -18.7%               | 31/12/2017*                | £32,026,684    | n/a                  |
| Kolorcraft Limited                    | 12/31/14                   | £22,279,289    | 12/31/15                   | £21,222,537    | -5.0%                | 12/31/16                   | £23,568,674    | 10.0%                | 12/31/17                   | £22,246,024    | -5.9%                |
| Ultima Displays Limited               | 12/31/14                   | £16,613,389    | 12/31/15                   | £17,993,096    | 7.7%                 | 12/31/16                   | £17,510,830    | -2.8%                | 12/31/17                   | £16,389,965    | -6.8%                |
| Aura Graphics Limited                 | 6/30/14                    | £14,109,000    | 6/30/15                    | £14,066,000    | -0.3%                | 31/12/2016*                | £22,033,105    | n/a                  | 12/31/17                   | £15,957,622    | n/a                  |
| Vinyl Graphics Limited                | 12/31/15                   | £16,165,876    | 12/31/15                   | £14,788,834    | -9.3%                | 12/31/16                   | £15,619,130    | 5.3%                 | 12/31/17                   | £15,016,133    | -4.0%                |
| A H Leach & Company Ltd               | 3/31/15                    | £8,923,056     | 3/31/16                    | £10,071,904    | 11.4%                | 3/31/17                    | £10,999,908    | 8.4%                 | 30/04/2018*                | £12,153,295    | n/a                  |
| Cestrian Imaging Limited              | 30/09/2014*                | £17,558,436    | 9/30/15                    | £11,254,617    | n/a                  | 9/30/16                    | £11,090,272    | -1.5%                | 9/30/17                    | £11,070,287    | -0.2%                |
| Simpson Print Limited                 | 10/31/14                   | £11,570,034    | 10/31/15                   | £11,483,532    | -0.8%                | 10/31/16                   | £11,682,661    | 1.7%                 | 10/31/17                   | £10,933,346    | -6.8%                |

Source: www.gov.uk/government/organisations/companies-house Copyright ©2019 Lightwords Ltd. www.lightwordsimaging.com

\*Accounting Year Date Change



# Hybrid offers market choice

Bobby Grauf – Sales Manager UK & Ireland – Agfa



L to R: Paul Smith MD PrintBig, Paul Abson Sales Director PrintBig, Henry Stevens Agfa & Joe Woolley Production Manager PrintBig

As the sales split between a true flatbed engine versus a hybrid wide-format machine hits 50:50 in the UK, print service providers now have a choice of equivalent quality and accuracy between these rival technologies.

For clarity, a “Hybrid” Large Format Print Engine is a term used to define a moving belt printer that can print on both sheets & boards (rigids) and on roll media (flexibles). The media on a Hybrid is transported under the print carriage using a moving belt, with the gantry, that carries the beam, remaining static. The alternative is a “true flatbed” printer, where the media sits on a static bed with the gantry moving over the media. True flatbeds can often be extended with a roll-to-roll option, however on most systems the width is less than the width of the bed, reducing the media scope.

When first introduced some Hybrids were found to be inaccurate with issues of registration, especially with board material longer than 2m. Early models also struggled with accurately when printing double-sided. Unfortunately, these early conclusions remain the view of some in the market today whilst in reality the technologies have improved dramatically since the early days. The proof to this statement can

be demonstrated with the ‘buy-in’ to Hybrid technology by some key players in the market, some who have always believed in its flexibility and others who have more recently chosen to invest in a Hybrid printer.

Ty Power from The Big Ink Tank in Coventry has always used a Hybrid printer since they started in wide format 10 years ago. They currently run an Agfa Anapurna H3200i LED UV Hybrid which they purchased in 2018. “I’ve always been a convert to a Hybrid engine, I ran Vuteks before our current Anapurna, all of which have been Hybrid machines. They allow us to put lots of different jobs together and give us the flexibility to create new products for customers. I’ve personally never had quality issues with a Hybrid.”

Hull based Garthwest is a 50 year old business with a print focus on in-store marketing material and they largely print on corrugated cardboard. They used to run an Agfa Jeti Titan Flatbed machine but in 2017 invested in the next generation Agfa Jeti Tauro Hybrid machine.

“We moved to the Jeti Tauro H2500 LED largely due to its increased speed and to gain an improvement in quality and we are delighted with its performance. The increase in speed alone has opened up new markets for us with significant growth potential.” Said Paul Dixon, Head of Design & Innovation at Garthwest.

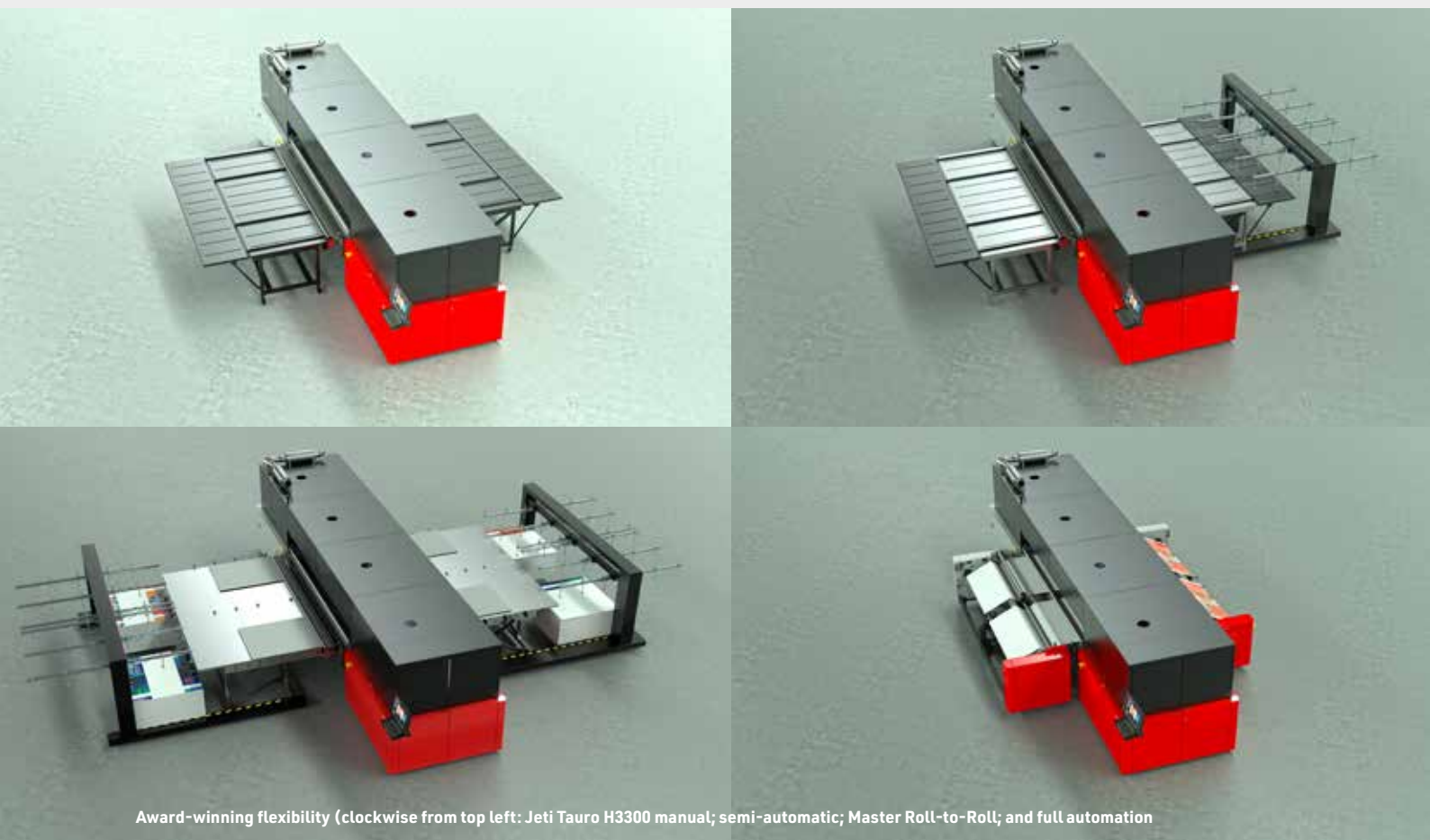
Paul Smith at PrintBig near Ashford invested in an Agfa Hybrid Anapurna H3200i LED in September 2018, which effectively replaced a Solvent 2.6m roll to roll, a HP latex roll to roll and an older Durst Omega Hybrid 1.6m. The business needed a wider format engine, especially to cope with soft textiles for their exhibition work and didn’t want to lose any features offered by their incumbent machines.

“The Anapurna Hybrid prints ten times the speed of our old printers and the quality is superb. For quality and square metres output it is at the best price point in the market today as an investment and it’s also extremely cost efficient to run. It not only copes with all our capacity, a Hybrid gives us ultimate flexibility in the work that we offer and saves us lots of production floor space too.”

If live case studies like these are not convincing enough that the Hybrid market is taking a lead, consider the technology. Today’s hybrid systems have improved belt and media transport mechanisms that are just as accurate as a flatbed. Double-sided printing is no problem either on the latest Agfa Anapurna and Jeti Hybrid presses and neither is the registration accuracy when printing on long sheets or boards. On the contrary, whereas flatbeds are physically limiting the size of the media as they can’t print a sheet that’s bigger than the bed, Hybrids can print many times the length of their own belt.

One could still perhaps argue that taping down a warped sheet or board is easier on a flatbed, but with its specially designed Hybrid belt and vacuum on the Agfa Jet Tauro, taping is no longer needed.

Automating a hybrid system to run either semi or fully automatic boards is relatively simple, as the media prints through the press as opposed to having to be loaded and unloaded from a table. Depending on the width of the press, it can handle up to four boards in parallel, hence further increasing productivity, with or without automation. It also offers the possibility to add jumbo roll-to-roll options, which significantly increases the capacity for printing on flexible media, leading to fewer roll changes, less downtime, and ultimately more jobs through the door.



Award-winning flexibility (clockwise from top left: Jeti Tauro H3300 manual; semi-automatic; Master Roll-to-Roll; and full automation)

Agfa is without doubt one of the main players in the Hybrid wide-format market that's reaping the rewards of its market growth. The Agfa range splits into two families; their Anapurna engine covers entry-level to the markets higher mid-range. It runs in speeds from 63 sq.m/hr to 129sqm/hr and offers maximum print widths of 1.65m, 2.05m, 2.50m and 3.2m, with prices ranging from £85,000-180,000. Agfa's high-end range is the award-winning Jeti Tauro with prices starting at £345,000 and with a maximum speed of 453 sq.m/hr. It's available in two widths 2.52m and 3.30m, with automation options for semi-automatic or fully automatic loading and unloading. Both Jeti Tauro



Agfa's Anapurna Hybrid LED family available in width of 1.6m, 2.05m, 2.5m and 3.2m



H2500 LED and H3300 LED offer Master Roll-to-Roll for flexible media printing of up-to 700 kg per roll in both single and dual-roll modes.

So, if you're looking to invest to fulfil an increased or new product capacity or you're simply wanting to update your current engine(s), take another look at the Hybrid market, it's moved on dramatically over the past few years and could offer you many advantages in space, cost and expansion into new markets.

[www.agfa.com](http://www.agfa.com)



# Doing Business In Transitional Times

We know the outcome of the Brexit referendum, but other than that we're in the great unknown. So how are those running large-format print businesses managing and thinking? Here's what four MDs have to say.

## James Lavin

Leach MD



**W**e expect to grow our £11m turnover by 20% by the end of 2019 and double it within five years. That target and expectation has not changed.

In 2018 we invested £500,000, an amount that included a Durst Rhotex 325 dye-sub printer, and spent another £20,000 building two mezzanine floors to create extra space. In 2019 we've invested around £100,000 in automating our front-end system and working on our Web portal. The intention is that these actions will make us more efficient, increase productivity, and bring us closer to the customer - and regardless of Brexit, we are confident that we can make the 20% turnover growth in our plans for this year.

We are of course focussing on existing clients, but we're looking to the Middle East for new work too. And the USA is a focus. Since Leach's takeover [by French-based Chargeurs in April 2018] we have developed some great products and have more financial backing to internationalise our offer. Pre-takeover, 10% of our work was overseas. I expect that to be 20% by the end of 2019, and eventually half of our turnover.

I don't want to use Brexit as any kind of excuse - we're sticking to our plans in regards to UK and international business. That doesn't mean we're not being impacted by Brexit of course, and we've been doing all we can to secure our supply chain for instance.

Senfa - our main supplier of lightbox materials - was already part of parent company Chargeurs so that is helpful! But most of what we buy on the hardware side for our lightboxes we buy from China on a quarterly basis, so we've been trying to get as much stock as possible. There's little else we can do on that front.

Given the Brexit situation, a lot of people are nervous right now, but as we see it there are long-term opportunities because of gaps in the market for new products. We appointed a new client services director, Suzanne Pitcher, at the start of the year because our product portfolio is growing all the time - and

we're aware that a more consultative approach with clients will bring in additional new business.

UK PSPs on the whole have sharpened up because the market has become so much more competitive, so many UK PSPs are now better at what they offer than overseas players are, so we can really make our mark in foreign territories - many of us

**We have developed some great products and have more financial backing to internationalise our offer**

are offering new products and services and are internally much more efficient etc. so we are increasingly being seen as go-to suppliers by overseas customers. Look, we did a project for the biggest museum in Kuwait a couple of years ago and have really started to make inroads in the Middle East. And only this spring, we handled lightbox installations at the Brooklyn Museum in New York - a real landmark job.

There's also plenty of opportunity to build on the eco-story of print-based displays. We recently introduced Eco-Screen - a back-lit product made from textiles composed of 100% recycled yarn, and what's more, when the graphic needs updating the fabric can be returned to us for recycling.

This 'return to base' model means the solution is completely circular, with two recycled plastic bottles required to produce 1m<sup>2</sup> of Eco-Screen. 2.29 tons of CO<sub>2</sub> are also saved for every ton of plastic bottles salvaged. Topics like carbon footprint, material reuse, closed loop business models and single-use plastics used to only interest the minority, but now they're mainstream issues that companies like Leach can address.

## Tony Barnett

John E Wright MD



It is hard not to mention the B word and any stated opinion has the potential to alienate roughly 50% of the population - including potential customers or even friends! However, I think we can all agree that it would be helpful if we got on with it. In the meantime, our default position is to hope for the best but plan for the worst and, in that respect, we are building stocks as much as we can given space restrictions, and keeping a close eye on credit limits.

Is it really going to be that bad post Brexit? Not compared to the financial crisis of ten years ago when sales fell by 25% from their peak in 2008 and companies were going bust due to banks pulling the plug. Bad debt was a real issue but we survived and eventually grew stronger. Lessons were learned which can be applied to the uncertainty today: excellent customer service, maintaining margin by adding value, and of course getting paid!

Finding ways to maintain margin, especially in a downturn, can be challenging. Being responsive to last minute requirements and meeting tight deadlines certainly helps but, in this digital age, it is almost becoming an expectation. We are finding that becoming part of the project team is helping. Working with creatives to help make their ideas become a reality, adds value to them by saving time and effort at the design stage.

We are pretty sure we won the Nottingham Open Tennis Tournament due to our all-hours flexible approach and our technical knowledge. It was explained to us that the main problem the previous year had been that the tournament was on the west side of Nottingham and, after a severe storm, the banners were in an unknown location on the east side! So we discussed mesh and the trade off between hole size and colour and how to correct this at the design stage to achieve the sponsor's branding guidelines. Brand enhancement is all about image quality and colour accuracy and, in that respect, we take media profiling very seriously.

Offering a one-stop solution for all of a project's requirements also helps and we offer a full range of products and

services from small format brochures or marketing collateral to grand format banners and rigid displays and, of course, the fitting teams to make it all happen on time and to budget.

Long term, it's about doing what has been asked of us with as little incident as possible. The old saying "it's better to under promise and over deliver" comes to mind, as does "it is ten times more cost effective to retain a customer than to gain a new one".

Own goals are to be avoided at all costs, but to achieve this, we need to constantly appreciate the efforts of our staff and invest in training and the best equipment.

If there is to be a downturn, there will inevitably be consolidation of the print industry and we are well placed to merge with or acquire like-minded businesses. Our turnover was £6m turnover last year. At the end of the day, we are a collection of businesses acquired over the past decade and every merger brings good people and expert knowledge.

We are also a little contrary in our investment strategy. So, despite a challenging environment, we have just bought the latest Xerox Iridesse printing press to add gold/silver impact to our small-format offerings and it has created quite a buzz amongst staff and customers alike.

We all need to stay relevant and have something to say and offer. Every day I ask myself: 'What is the point of John E Wright Ltd?' and then together with my management team try to make it happen.

**We are well placed to merge with or acquire like-minded businesses**

## Simon Osborne

Oasis owner and MD



**S**itting on the fence has never felt so brave. The level of uncertainty surrounding Brexit is the scariest thing about it. Not knowing the best way to prepare or protect ourselves is unnerving. Everyone is advising to ‘be prepared’, but how can we prepare for the unknown?

Over the last year we have looked in depth at the business with the support and guidance from our advisors, and the answer is always the same...preparing for the unknown is impossible and ineffective. The government is advising, “prepare for every eventuality” but this is not feasible or sensible for a small business. I would consider us to be busy fools if we rushed into pouring much needed resources in to preparations for two opposing outcomes, one of which will not happen.

So perhaps with what may seem on the face of it as naivety, we sit on the fence. We are riding out the wave until the waters settle and then we will react accordingly. We run an organised ship, with room for flexibility and so I am confident that we can make the right decisions quickly and adapt when the future is clear.

This has played a part in our business strategy, which we have refreshed at the beginning of 2019. Whilst turnover has remained steady, profits have been affected by rising costs attributed to Brexit - the same story for many PSPs, as costs of materials such as self adhesive vinyl rise. So our approach is to stand strong. Make no rash decisions, no big investments, keep staffing at a level and steady the ship, ready for turbulent waters ahead.

We have questions of course. We are not ignorant to the affects either outcome of Brexit will have on our business, but at the moment no one can answer those questions, so preparing seems futile. We are asking our suppliers if they are stockpiling goods so supply isn't affected post Brexit. We are asking our HR advisors what Brexit could mean for European travel, as carrying out work in Europe is a huge part of our business and changes to free movement may affect working rights. We have logistical questions about mobile phone tariffs and driving in Europe. We are aware that custom charges, costs of transportation of goods and import tax could affect our costs and we are asking who will swallow these costs? Our lawyers have warned us of potential tax changes and advised we may even need to appoint a fiscal agent in every EU member state where we supply goods and services but none of this can be done until we know what the outcome of Brexit will be.

We are already feeling the affects of a sluggish UK economy due to panic over Brexit. As already mentioned, supplier costs have been steadily rising for around two years now. Our accountants and lawyers make us aware of potential increased borrowing costs, inflation, and affected IP rights. Aware we are, but acting we are not. How can we act, until we know how these matters will be affected?

We are seeing the affects of reduced customer confidence. Not in our goods or services but the confidence to invest as much money in projects. This seems to be across the board, and perhaps because our product sits within a client's ‘marketing budget’, it is the first to be reduced when clients want to steady their own ship. And so we are all affecting each other with our caution, and this is the true nature of uncertain times. The best form of preparation we can do for Brexit is to remain on the fence while the decision is made. But most importantly, we must be ready to be flexible and adaptable enough to react appropriately when the veil is finally lifted.”

**We may need to appoint a fiscal agent in every EU member state where we supply goods and services**

## Richard Courtney

Gardners MD



**B**rexit and its delay in particular, has been a hot topic of conversation for months on end and with it we've seen growing uncertainty at different levels of business operations and decision-making across all industries. The reality of the situation is that the effects of Brexit have already started to kick in, with some organisations 'planning for the worst and hoping for the best' and others still sitting with their heads in the sand. Belts have started to tighten in preparation and I don't see this slowing down, particularly as EU officials are reportedly considering a much longer delay (2021). People do funny things during periods of prolonged uncertainty (and not always the haha kind) so I anticipate that there will be some knee-jerk reactions in due course.

As an industry with a turnover of £13.8 billion (2016, BPIF) and employing around 116,000 people in 8,400 companies, the UK print sector is an important economic contributor and employer across the UK. We certainly should be preparing for the potential impact of things spiralling, especially in light of foreign investors starting to look elsewhere.

With Brexit on the horizon there is no doubt that all aspects of business, everything from recruitment to the supply chain should be reviewed, but despite the scaremongering I don't think everything will be affected. People will still find a way to do business with each other, after all a business is an organisation where people work together to '...buy or sell good or services' (Oxford Dictionary) so I have no doubt that no matter how tough things may get, we'll find a way to work together post Brexit in whatever shape or form that may be. We've come a long way since the European Union was set up with the aim of ending frequent and bloody wars and I would hate to think that all the progress made since has been in vain.

Rather than taking a head-in-the-sand approach or just 'winging it', we're trying to stay positive by looking at what we should be prioritising. For example, protecting our supply chain to ensure continuity of service and minimising the impact of exchange rates. Customer experience is a top priority for us and as a business with a high percentage of work coming from referrals and long-term relationships, a supply chain failure is not something we would take lightly. This can have a tremendous impact reputationally, not to mention on the bottom line too, so we are having numerous conversations around planning ahead and ensuring consistent service delivery, as well as any financial implications a change may have with suppliers and clients alike. It's important to keep

dialogue and communication lines open and to be proactive to maintain high levels of service and profit margins.

"Keeping on top of regulations and potential changes is also something we are focusing on. Knowledge is power and being aware of possible changes means we can consider all our options and make the most informed decisions, particularly due to the nature of our work. We go beyond print production and

**Everything from recruitment to the supply chain should be reviewed, but I don't think everything will be affected**

the transformations we undertake require us to adhere to stringent health and safety regulations. As such, we'll be investing in legal advice to help prepare for any possible changes but will also continue to closely review, and potentially increase, stock levels alongside upping the ante in terms of marketing and relationship building. Nurturing current business partnerships is a given but widening our reach and seeking out the right opportunities and people to do business with will also be key to weathering the storm, that is currently the delay of Brexit and potentially in time, Brexit itself."



# Going soft

How dye-sublimation soft signage has completed the impressive service offerings at Ottimo Digital



Ottimo Digital has a full array of wide format service provision, which according to its two founder directors Lee Crew and Nick Lindwall are offerings you simply can't refuse. Whatever you require from super-wide graphics, through to PVC banners, Foamex, back-lits, POP and everything in between, this

Newport, South Wales-based print shop has got it covered.

Underpinning this 360 wrap around service is the simple but uncompromising driver – to ensure forward, successful growth.

In its ten years, forward successful growth is a leading characteristic of this wide-format trade services company.

Founded by boyhood pals, (the aforementioned Nick Lindwall and Lee Crew) to service the exhibitions sector, in the great

tradition of humble beginnings, the company started off in premises the size of a back bedroom with a 1600mm wide Mutoh inkjet printer.

Since those days the company has grown year on year, has new premises, a staff of 15 and turnover of £2 million. Exhibition work still accounts for more than half its output.

However, it seems that Ottimo is about to take another leap forward, thanks to the

arrival of a significant piece of kit, the EFI VUTEk FabriVu 340i dye sublimation printer, purchased through independent wide-format digital print specialist CMYUK.

The FabriVu 340i is a new variant of the EFI VUTEk 340 FabriVu soft signage printer. Crew and Lindwall first saw the machine when it made its debut at FESPA in Berlin last year.

Featuring an inline fixation unit, which negates the need for a separate calendaring unit, the 340i was designed for PSPs like Ottimo that wish to grow the soft signage part of their business but with a one-step approach.

Says Crew: “The FabriVu 340i has its own in-line sublimation so print comes off the machine as a finished piece ready for converting. That takes a lot of the dark art away and makes it a lot less scary prospect to get into, especially as this is our first foray into dye sublimation print.”

It may be the company’s first experience of in-house dye sublimation work, but Ottimo had already been outputting soft signage i.e. backlit fabric through its 5m wide EFI Quantum 5LXr UV printer generally for single use work, but felt that the UV ink was limited for many textile applications.

The reason for finally deciding to purchase the FabriVu 340i was down to increasing customer demand, reflecting the growing trend in the event, retail and exhibition spaces towards fabric dye-sublimation. The benefits here are well known i.e. ease of transport – fabric is light, can be folded, isn’t prone to damage and can be reused. Then add color vibrancy, the ability to produce a fresh and highly impactful aesthetic that doesn’t suffer from lighting issues. No wonder soft signage is one of the fastest growing segments in digital printing.

These benefits were not lost on Ottimo’s clients who started to specifically ask for this type of printing process.

“The FabriVu 340i is a proper textile printer,” says Lindwall. “Our fabric prints before were ok but very much single use, whereas with a dye sublimation printer everything is so much better. The ink becomes part of the fabric. You can fold the fabric and it’s easy to transport. Everything can be reused.

Crew adds: “Customers were insisting they wanted dye-sublimated printing. They wanted the material to be folded. They wanted the look and feel of something much softer. They were also after the vibrancy of the print, you can’t get anywhere

## THE EFI VUTEK FABRIVU 340i AT A GLANCE

- 3.4-metre wide aqueous-based soft signage printer with inline sublimation
- Vibrant four-colour printing with a wide colour gamut and deep colour saturation for exceptional fabric display graphics
- Ultra-high resolution up to 2,400 dpi and four level greyscale printing with 4pL to 18pL drop sizes
- Production speeds up to 250 m2 per hour
- Auto printhead cleaning station increases printer uptime
- Capping station to keep your system up and running
- Medium-viscosity ink, high-resolution printheads, and ink recirculation for improved ink yield
- Fiery® proServer SE with Fiery XF production digital front end and colour management workflow
- Water-based CMYK dispersed-dye Genuine EFI Inks
- Enhanced Service Program (ESP) warranty for your printer, Fiery proServer hardware, and Fiery XF software

near the colour vibrancy with UV, whereas with dye sublimation you get really, really, punchy colours.”

The company is using CMYUK accredited premium textile materials from Pongs for Frontlit, Backlit, Blockout, Black Back and Flag applications. These have been calibrated to the machine to provide exceptional output quality.

Says Lindwall, “We have been very impressed with how the Pongs fabrics have performed on our FabriVu and coupled with the profiling support that both CMYUK and Pongs have provided, we can be assured of consistently high-quality print results across all of these textiles.”

The EFI VUTEk FabriVu 340i is the third EFI VUTEk machine the company has bought through CMYUK in as many years, representing an investment of nearly £1 million. The plant list also includes a high-speed EFI VUTEk LX3 Pro hybrid, Esko Kongsberg C64 digital cutting table as well as its 5m wide EFI Quantum UV printer and solvent printing capabilities.

Very shortly the company is to take delivery of a new AE automated conveyor

sewing machine that will complement the soft signage work from the FabriVu 340i. Staff are being retrained to use this machine, but due to its semi automatic capability, the machine is able to do a great deal of the work itself, is faster and finishes fabrics to a far higher standard.

Ottimo Digital too, has just expanded its premises to accommodate the new machine, and has taken on an additional member of staff and retrained another to work on it.

However, rather than moving into new market sectors such as fast fashion and décor for example, the company’s focus is still very much targeted towards exhibition work. It expects to be able to service its regular customer base in a deeper way that matches current trends and client expectation.

“There’s also an obvious business benefit,” says Lindwall. “We’re basically targeting work that we were missing out on before because we didn’t have this technology. So we’re hoping it will add a fair amount to our turnover.”

Likewise, it is expected that the dye sublimation capability will bring in new customers, and in turn expose them to the other processes and services that Ottimo Digital has to offer.

At present, the company is working with a few close clients to navigate the learning curve that bringing dye sublimation in-house has rendered. Says Lindwall: “We’re going at this one quite slowly because we want to get it absolutely spot on. Once we’ve got our new sewing capability in, and it’s up and running and we’re happy with everything, we’ll start the promotional work. We just want to make sure that we get this right for our customers.”

Existing UV fabric backlit work will be migrated to the VUTEk 340i because the machine will do a better job. However, both directors point out that the FabriVu 340i is part of an impressive arsenal of equipment that can service all customers comprehensively.

“It was really like the last machine for us to buy,” says Lindwall. “We’ve got the five meter wide printer so we can print as wide as possible in a single piece. We’ve got a high-speed flatbed and now we’ve got a textile printer as well plus we’ve got digital cutting.”

Adds Crew: “We’ve got all the assets now so our customers have no excuses to go anywhere else. We can do everything, you know, everything.”



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# Insight from the frontline

CMYUK speaks to Widthwise about adjustments in the wide format print market, and why and where investment is being made.

**R**obin East Group Director at CMYUK sits in a rather privileged position. The company he set up with Jon Price 15 years ago has become the go-to place for those working in the sign and graphics market. The CMYUK training and demonstration facility in Shrewsbury offers wide format service providers – whatever their flavour and size – the opportunity to evaluate and consider how cutting edge new technology can work for their businesses.

CMYUK is right in the thick of it.

Says East: “We see ourselves as a good industry barometer. We’ve invested over £3million in a superb training and demonstration facility – a non sales environment where we highlight, promote and educate our customers on new applications and latest technologies. However, as good as we are at supporting, guiding and showcasing, people will only invest when they have their own opportunities.”

With the suppurating sore of Brexit never far away, one could be forgiven for assuming that gloom is the order of the day, but empirical evidence at CMYUK points otherwise.

“People are recognising new opportunities. They are investing in equipment and advances in technology are helping to drive demand,” he says.

## Shifting markets

Last year, there were some shocks in the UK with the closure of some giant print groups responsible for the fulfilment of tens of millions pounds worth of print.

From the CMYUK vantage point, East and his team have seen a significant amount of that untethered print volume flow to what he describes as ‘super print providers’, those facilities with large, dedicated wide format capacity.

“We’ve seen a great deal of investment in VUTEk equipment in the commercial, digital, wide-format mid sector. In print management too, we’re seeing links being removed from the supply chain, with many of these wide format printers dealing directly with retailers. We see this sector as flourishing,” he says.

## High-flying sign makers and PSPS

With the digital wide-format, commercial sector doing well, and undertaking higher volumes of work, their lower print volume work is making its way to the traditional, wide format, digital PSPS. This populous sector responsible for outputting national, regional and bespoke project work is also investing in new digital equipment and services, which perhaps in the past, would have been outsourced. Advances in equipment, and lower costs are making the difference.

“We’re seeing incredible, affordable technology across all areas of the digital offering. Digital cutting from Esko is selling at £90,000, 3.2m wide printers are now £70,000. There’s a shift to bring all that ownership in-house. The equipment is reliable, versatile and clever. You can now invest in machinery that really is a business in a box without needing to make life-changing investment,” says East.



**People are recognising new opportunities. They are investing in equipment, and advances in technology are helping to drive demand**

## Growth areas

One of the dynamic growth sectors in digital print is textiles, incorporating soft signage, décor, fast fashion et al. In the last five years, CMYUK has experienced a 100% year-on-year growth for textile materials, establishing a dedicated service division to support PSPs moving into these new areas of opportunity.

Says East: “Investment always has to be considered and that is why we put such a lot of emphasis in supporting customers making that decision. We’re interested in the Justification of Ownership, which is about balancing risk with current fulfilment, contingencies and opportunities.”

He believes the next five years will be highly significant. “We’ll start to see short runs for interior decor certainly, and that may be via existing digital PSPs or analogue textile producers switching to digital equipment. Designers will bring digital print in-house, and we’ll see a new breed of specialist décor print service providers. Whatever way the provision divides, the growth will be massive.”



# Question Time



**John Selby**  
CEO,  
Papergraphics



**Chris Logan**  
Director product management,  
CAD/digital finishing, Esko

**Print kit running costs and consumables prices are two key areas of concern for large-format print providers? What are you doing to help?**

One way is by highlighting the improved running costs that can be achieved through refreshing their equipment - in many cases we can help generate ROI's below 12 months through technology refreshes. Secondly, we divide up our product development resource between (a) developing products for new emerging applications, and (b) looking at ways we can re-engineer commonly used, mainstream products to make them more cost effective, whilst still maintaining high standards of reliability and quality. A further key aspect of our offering is how we look to help our customers minimise their wastage and maximise their operational efficiency through a range of training and technical support services, such as our workflow automation and colour management training.

Supporting large-format converters to manage their print equipment running costs and consumables means optimising their pre-press environment to deliver error and waste reduction, as well as press capacity utilisation and digital finishing. Automating the prepress stage helps.

Esko provides a portfolio of hardware and software solutions for wide-format, including Esko Automation Engine, a modular web-based prepress automation software that drives productivity across the entire wide-format workflow. It also enables operators to merge different jobs on to a single sheet to optimise capacity and reduce material waste.

An addition to Esko Automation Engine software is Device Manager, which moves operational control upstream to the prepress department. It allows companies to use their hardware at maximum capacity by providing smart estimation functionality and the possibility to balance loads between devices.

**As consumers and retailers in particular look to green up their supply chain, how are you helping print companies reduce their carbon footprint?**

Our product development team work hard with our supply partners to develop materials that offer improved 'green' credentials - for example, all of our papers are FSC or PEFC accredited. We also operate an environmental management system in line and accredited by ISO140001 to reduce waste and dispose of it responsibly. Furthermore, where suitable, we've introduced consignment stock arrangements to reduce the carbon footprint and give our customers immediate, on site access to the stock they need without tying up their working capital.

By automating prepress workflow with Esko Automation Engine the likelihood of errors in the print process is reduced, resulting in a lower overall carbon footprint. This also impacts upstream suppliers where unnecessary production, inventory and transport is avoided.

Also Automation Engine ensures sheet use is maximised; when partial sheets are created, Esko I-Cut layout software 'remembers' the residual partial sheet size and creates a label for easy storage. When another job arrives that allows that reduced sheet size to be used, the software will instruct the operator to select the sheet from storage, further minimising waste.

Software such as Studio Store Vizualizer or ArtiosCad 3D, combined with the virtual approval system Esko WebCenter, means the need for customers to be provided with physical mock ups, manually approve jobs on site or attend press trials is minimised.

Finally, Esko offers Cape Pack software to boost converter shipment sustainability by determining the best case count, product arrangement, case size, pallet and container load to optimise shipping conditions, minimize in-transit waste and maximise transport utilisation.

**Industry 4.0 remains a low priority in the large-format print community.**

- 1) Why do you think that is?
- 2) What are you doing about moving it up the agenda?

I think a big reason it's not high on the agenda is that there aren't many (if any) real world working examples of full automation in the LFP arena. One of the main reasons for this is OEM's reluctance to open up the access needed to manage and control their equipment through third-party applications and control systems. Until such time as OEM's embrace this potential and understand how much more valuable their equipment can be as part of a fully automated solution, integrated with other manufacturer's devices, then we will stay in an un-joined-up industry.

From our perspective, for a number of years now, we have been working with printer OEM's to try to at least open up access and control of the data being generated by the equipment so that we can provide our customers with more innovative and cost effective supply solutions... We can't go into more detail at the moment, but we hope to be able to make some big steps forward in the near future.

At Esko we believe that the large-format community is embracing Industry 4.0, but admittedly in bite-sized chunks. We observe converters automating repetitive and critical processes in prepress and print processes while remaining unconnected across the entire business workflow.

The majority of converters that we work with in the large-format sector recognise that digitalisation is a key differentiator, and we are working with a range of customers who are assessing their stage of digital maturity relative to what can be achieved and we are supporting them to connect their processes, both internal and out to their external suppliers and customers.

If Industry 4.0 is low priority for a converter, it is often due to concern over cost of investment and technical skill requirements, which will continue to accelerate as labour skill shortages exacerbate the situation. But, many solutions today from Esko are highly intuitive and easy to use, avoiding the need for skilled labour, and can be easily adapted to the specific business environment.

To move the digitalisation agenda forward, Esko hosts a number of regular webinars on developing 'The Automation Mindset' and how to address the steps to digital maturity.

**What do you consider to be the biggest technological issue now facing the large-format digital print sector, and are you involved in addressing it?**

With fewer retailers requiring display advertising and merchandising, and those that do moving towards electronic displays offering more personalised advertising without the need for physical input to change their messaging, there's a need to look at opportunities for growth in other market sectors - particularly decorative interiors, and growth trends in the demand for personalisation. Our product offering, and work to promote these solutions to the end users (architects, designers and specifiers), is helping to grow these markets for our customers to benefit from.

Also, large-format 3D poses a brand new approach to graphics display and signage, but it requires pioneers to explore, create market-desire and discover the best ways to make these exciting new applications.

The capacity and capability of new presses are such that the prepress and finishing processes can become critical bottlenecks to maximising press productivity if not automated - and Esko has tools to help resolve that.

With the Widthwise 2019 survey data prompting key questions of the industry's supplier network, we asked a representative sample for their responses. Here's what they had to say...



**Rob Goleniowski**  
Head of sales,  
UK and Ireland,  
Roland DG

At Roland, our inks are set at a price point which fairly reflects their quality and efficiency. Where some businesses might opt for a cheaper alternative, we've seen time and again how this proves to be a false economy. The design of our hardware runs in tandem with the development of our inks and our goal is to craft a solution which gives our customers the best output with the lowest possible consumption.

At Roland, we take our environmental responsibility very seriously and we do all we can to reduce waste at every stage of production - from our carbon neutral factories in Japan, to our eco-friendly packaging and the fact that 98% of components we use are recyclable.

The entire large-format print industry has made great leaps in developing better equipment, and that goes for every manufacturer in the arena. Due to the pressure of this arms race and changing customer demands, the highest priority is to develop hardware that exceeds expectations. With this in mind, it's understandable that many manufacturers have yet to invest in 'smarter', more connected systems.

Roland's development philosophy hinges on a holistic approach and as such we develop our software in-line with advancements in the hardware. As well as our new VersaWorks 6 Rip software, we have also created apps like Roland OnSupport and Roland Mobile Panel which allow users to monitor their devices and control certain functions remotely. As we continue to develop the next generation of devices, buyers can expect inter-device connectivity to become a key feature.

Print businesses are under constant pressure to turn work around faster for an ever more demanding client base. We are focusing on developing hardware which is efficient and fast, software which streamlines production and ink technology, like our new TR2 ink, with shorter drying and outgassing times.



**Bobby Grauf**  
Sales manager UK/  
Ireland, inkjet sales  
UKIE, Agfa

Quite often the lowest litre price does not translate into the lowest cost-per-print. We advise printing companies to compare not only the ink price and ink usage per square metre, but also the ink waste through automatic and manual maintenance on the press. Similarly, printers should look at how much maintenance a system requires and how long it takes.

At Agfa we develop our wide-format systems with cost-of-ownership in mind. For instance, we use our patented Thin Ink Layer Technology across all our products, which combines front-end software, printers and presses, ink, and services to deliver the best print quality at the lowest total ink consumption volumes including waste.

We aim to reduce waste wherever and whenever we can. To give you four examples: Firstly, Agfa's Thin Ink Layer Technology reduces the amount of ink per copy and ink waste. Secondly, using Agfa's Asanti workflow and its integrated CMS greatly enhances repeatability, hence reducing waste prints and costly re-prints. Thirdly, we build all our UV wide-format presses with LED curing. This significantly lowers energy consumption, start-up time, and need for lamp disposal compared to legacy UV mercury bulbs. Finally, we build our systems to last in terms of robustness and longevity. When the time comes to move on, users can access Agfa's Approved Used programme, where pre-owned equipment is refurbished and remarketed.

The nature of large-format printing demands immense flexibility and it's this aspect, especially in the context of automation, that I hear most when discussing Industry 4.0. However, printers who have invested in Agfa wide-format solutions are already embracing the concept of Industry 4.0. Agfa deployed cloud computing and automation in print many years ago. We started with larger newspaper and magazine printing companies, and enhanced our solutions to fully integrate small and medium sized commercial litho and large-format printers. It's in the latter where we see an increasing global demand for full or partial automation and further centralising of data management.

We will see further enhancements in improving productivity and lowering running costs. We are focused on improving not only our new systems, but our installed base too, where marginal gains are vital to retain the competitive edge. With the advances for jetting and curing/drying technologies we see huge potential for businesses to grow in markets adjacent to their own.



**Nils Gottfried**  
Product manager,  
wide-format inkjet  
systems, Fujifilm Graphic  
Systems EMEA

One of Fujifilm's core competencies is bringing together the best possible combination of hardware, printheads and ink to guarantee longevity and high residual value. Fujifilm draws on its knowledge and expertise across inkjet technologies to create patented Uvjet ink systems - which offer excellent vibrancy, saturation, density and ink adhesion capabilities - which in combination with hardware leads to a reduction in required maintenance and improved up-time due to the high stability of the inks, and very low ink usage.

Fujifilm takes its environmental responsibilities very seriously, from LED curing technologies to reduce energy consumption, to emissions reduction in inks for indoor use - for which Fujifilm's Uvjet inks have been recognised with Greenguard Gold certification. Fujifilm's entire wide-format range is also designed with waste reduction in mind.

I think Industry 4.0 remains a low priority in the large-format print community because it lacks a cohesive driver across the industry as a whole. Fujifilm is heavily involved in robotic automation and smart preventative maintenance systems which play a vital role in ensuring the smooth running of machinery and continuous, uninterrupted production.

Fujifilm is working to provide technologies to help customers begin to explore new markets and applications outside of the traditional graphics sector. A good example is our Acuity B1 flatbed machine which is increasingly being used for industrial metal decoration applications. With our Innovation Hub in Tilburg and our local hubs across Europe, we give a clear message that we are at the forefront of innovation. Recently, Fujifilm stepped this up another gear by launching the Creative AI Centre: 'Brain(s) Kyushu' in Nagasaki.

# The Role of Modular Display Systems in The Exhibition Environment

It's a well-known fact that face-to-face marketing plays a key role in many successful business strategies; research conducted by CEIR shows that 64%+ of surveyed marketing heads agree that the B2B exhibition channel is highly effective for multiple marketing/sales activities, like securing new customers. Exhibitions are also a great place to meet new potential suppliers, find new ideas and forge new sales relationships with potential customers. That's why you'll often find savvy marketers looking to invest a generous amount of time and money into designing a great exhibition display, that will promote their brand positively, whilst delivering on impact. As one of the most powerful channels for face to face marketing, we can see the importance of tradeshows, when looking at research from CEIR last year.

Here are the stats:

- 99% of exhibitors find unique value delivered by B2B tradeshows that are not provided by other marketing channels.
- 90% of tradeshow attendees won't have met face to face with any of the companies exhibiting at a tradeshow in the 12 months prior to the event.
- 46% of executive decision makers made purchase decisions while attending a show.
- 92% of tradeshow attendees come to see and learn about what's new in products and services.
- Over 50% of tradeshow visitors are attending for the first time. With new players emerging in the industry each year, a tradeshow is an ideal place to meet these people.
- 77% of executive decision makers found at least one new supplier at the last show they attended.
- 51% of tradeshow attendees requested that a sales representative visit their company after the show.
- 76% of executive decision makers asked for a price quotation at the last show they attended.
- The cost of a face-to-face meeting with a prospect at a tradeshow is approx. £100.



The cost of a face-to-face meeting at a prospect's office is approx. £200.00

In 2018, the exhibition industry's performance surpassed its last peak and is now anticipated to break new ground performance-wise, in terms of revenue growth and number of attendees, through 2021. "Moderate economic, job and personal disposable income growth should continue to drive exhibitions," noted CEIR Economist Allen Shaw, Ph.D., Chief Economist for Global Economic Consulting Associates, Inc. Which is where modular displays come into it. Modular displays are lightweight, versatile and can usually be built by just

one person (although there are plenty of companies who can provide a build service, especially for large or complex displays), so it's no wonder there has been a substantial upturn in the modular display market, with more businesses investing their money here.

The modular display is also cost-effective, which makes it the more economical option. Why? A prime reason is the reusability of the system. This means that once it has been used to fulfil one purpose, it can then be used time and again, either with the same design or reconfigured into something completely different. The result of this: lower costs and a higher return on investment. Plus, it's also good for the





planet! It's not uncommon to exhibit at multiple events a year. So, to avoid being wasteful and reducing carbon footprint, opt for a stand that can be reused on as many occasions as possible, it's a win-win for everyone! And, as modular displays are usually lightweight and compact, the costs of transportation are reduced.

Some stand designs, particularly custom-builds, tend to still use materials such as timber, which is then incinerated after one exhibition. According to UFI's 2014 Global Exhibition Industry Statistics report, an estimated 4.4 million companies exhibit across the globe each year and if every exhibitor used their stands just once before sending off to the incinerator, that equates to a lot of wastage! If businesses are choosing to exhibit with a framework display that can be dismantled after a show and put up again in a different configuration, there are only pros, not cons! Which is another

reason why the T3 modular system is such an ideal display solution.

For example, a T3 modular display system can be used & reused, built & rebuilt, configured & reconfigured over an endless number of exhibitions, but with different graphics. This means reduced outlay for the customer overall, providing the opportunity to change the face of their displays more regularly; fresh graphics are always highly sought after by marketers! And because this display option is so viable, the potential for businesses in the print industry to increase their own revenue, is also huge. There is opportunity for prints and re-prints, all because their exhibition-to-exhibition costs are reduced by the want/need to only replace graphics, instead of the whole stand. Marketers understand that at a trade show filled with hundreds of exhibition stands, they must try and do something to stand out (excuse the pun) from the

rest and reach as many eyes as possible. We know this can be easily achieved by using high-level branding and eye-catching graphics with a clear brand message.

Customers are realising exactly what the benefits of modular displays are:

- Grows with customer requirements
- Reconfigure and reuse
- Lightweight and compact
- Reduction of overall cost (labour, storage, transport etc.)
- Speed of build
- Cover with different substrate materials
- Flexible and versatile
- Integrate custom elements

So, it's really no wonder they're converting from more conventional type stands to modular displays. All they are lacking, are printed graphics.

What's more, an added bonus of modular systems is the customer is not limited to just exhibition displays. There are a whole host of other display options that all require printing services! Conference sets, event backdrops, entrance features, point of sale displays and retail displays, to name but a few. This makes this a very lucrative opportunity for printers and graphics houses.

So, as you can see, the exhibition industry is booming. And with over 265,000 exhibitors and 13 million visitors still attending tradeshow every year in the UK alone, there's no sign that it'll be slowing down anytime soon. This is the perfect opportunity to increase your own revenue for display graphics, whilst providing all the new (and returning) modular display customers, with exactly what they need time and time again!

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# The Discomfort Zone

Is it time to reinvent your company's place in the supply chain?

**H**ave you ever considered putting electronic tags on your staff? You know, like the ones they use to track prisoners out on parole. Accenture, one of the world's largest and shiniest management consultancies, says that, as Orwellian as the whole idea sounds, it could save time, money and lives, concluding: "Workforce analytics come with their own set of trust issues but many experts say the opportunities ultimately outweigh the risks."

These are the kind of experts who give knowledge a bad name. Besides, what is the point of tagging staff when you can replace many, most, or, quite possibly, all of them, with technology? This is how one Japanese print CEO envisages his factory of the future: "All devices, peripherals and processes will be connected using IoT, en-

abling dramatically improved transparency of real-time operations. A single operator will control multiple systems, part-time employees, AI and robotics. Our vision is to create a smart printing factory that uses next generation printing logistics to achieve a truly new dimension of productivity." When we say future, Katsuya Kawai, who runs the large Japanese gravure printer Mizukami Insatsu, is talking about 2025 as the year he expects his vision to be fulfilled.

Some wide-format printers will find this vision alluring. Others may pine nostalgically for a time when print was more of an art than science. In one sense, how print service providers react is irrelevant. Kawai's vision - or something resembling it - is the future, whether the sector welcomes the transformation or not. Yet there are various factors that could ensure, as the novelist Douglas Coupland put it, that when the future does arrive, it will be unevenly distributed.

For a start, the pace of change is going to depend on the customers. Printers who supply large companies - especially those that are publicly listed or in the retail sector - are likely to be affected first. Retailers and brands face such relentless pressure on costs, partly thanks to the inexorable rise of the Amazons of this world, that they will increasingly look to technology to drive efficiencies. That means automation, the application of AI and the replacement of the traditional supply chain with something that it has become fashionable to call a supply network or eco-system.

In this high-tech, outward-facing world, the print service provider becomes one point on a network that may receive business as and when required. The company may also find itself reluctantly co-existing with other print suppliers on the same network. There is nothing that can be done about that: it will be the price of doing busi-



ness with many large companies. This implies that print service providers will need the flexibility and capability to plug into different clients' technological systems.

There's nothing surprising about this - it has been on the cards for at least the past decade - but it does represent something of a cultural challenge for British wide-format companies which remain, as the 2019 Widthwise survey emphatically demonstrates, reluctant to embrace such relatively simple propositions as Web-to-print and personalisation, versioning and VDP. If anything, as we discuss in the technology findings on pX of this report, the sector is reacting to uncertainty by focusing its investments more narrowly on the kit - specifically new printers - that will generate most revenue in the short to medium-term.

Technology never sleeps. Nor does it stand still. And in a Volatile Uncertain Complex and Ambiguous (VUCA) world, a term

**Print service providers will need the flexibility and capability to plug into different clients' technological systems**

coined by Unilever, many organisations are looking to technology to help them reinvent their business - not once and for all but serially and continually - as they seek to become, to use yet another buzzword, agile.

What do large companies that buy wide-format print mean by agile? They mean having the data, analytics and technology to anticipate, measure and respond to sudden spikes in demand. To achieve this, they need all of their suppliers - or, at a minimum, their most critical suppliers - to join their network or eco-system. For print-service providers that could well mean accepting files in whatever format the client prefers. One of the upsides of this brave new world is that such systems will also make it harder for print buyers to procrastinate about payment.

Eco-systems can work the other way too. You need never worry about your stocks of vinyl again because sensors in your print plant will automatically inform your supplier when you are running low. Your supplier can also diagnose - remotely and automatically - when your press is in imminent need of maintenance or repair. This gives wide-format print businesses an opportunity to reduce running costs and expensive interruptions to workflows. Slightly further down the line, as Virtual Reality develops, it could even be possible for a print service provider to envisage a new plant in lifelike detail before they spend any money on it.

Smaller companies that purchase wide-format print are less likely to be early adopters of this high-tech eco-system model - unless they are obliged to join in by their own customers. At first, the complexity and expense of this kind of transformation will deter them from taking the leap and they may prefer to wait until the technology is simplified, standardised and significantly cheaper.

Many companies - be they print buyers or print providers - may be right to wait. One of the most underrated challenges concerning new technology is that management tend to overlook the broader impact on the organisation.

Digitally transforming a business isn't like updating the company's smartphones. It throws up all sorts of strategic questions - the corporate equivalent of 'where do you see yourself in five years' time?' clichéd job interview question - and cultural issues that need to be



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discussed and debated before management can define exactly what kind of digital transformation would be of most value to the business.

That message needs to be clearly, repeatedly, communicated from the top down, so that every employee understands the priorities and those whose job it is to drive change can build, scale and execute the changes. The greyer and vaguer this vision of digital transformation becomes, the more likely it is that projects will overrun in terms of time and money and that management will find themselves embroiled in unnecessary conflicts.

Sometimes, managers struggle with the all-pervasiveness of the change required. Traditionally, managing directors and boards prefer to focus on a project here and there when the really significant improvements in performance depend on how well the whole change management process is orchestrated.

Haier, the rapidly growing Chinese consumer electronics company, has coined a term for its own business transformation “rendanheyi” - “ren” for staff; “dan” for user value and “heyi” for unity, in other words, an awareness of the entire system.

Too many managers say they’re taking a holistic view when they’re actually only looking at two things at the same time. Yet a vision of how the business works, how it ought to and how it will work in five years time are essential if print service providers are to stay competitive. In the age of intelligent automation, the companies that build a capacity to use the technology - rather than merely buying it in - will find it much easier to compete. To be fair, some British wide-format print companies are already doing this, innovating with software and hardware to devise solutions so complex and bespoke they make it hard for anyone to compete on equal terms.

This capability could be developed still further. Suppliers of cloud-based procurement systems are already talking of systems that effectively use AI as a kind of layer, applied over the existing business, which mines data to give managers a more comprehensive view of operations in close to real time. Initially, these will be introduced at the kind of large corporations which have invested heavily in - and have often been disappointed by - enterprise processing systems. Yet, as surely as our washing machines came to contain more computer power than was used to send Apollo 11 to

the moon, capability will increase while size - and price tag - will shrink.

It’s hard to predict how long that will take but it will probably happen quicker than we might expect today. Thomas Erwin, KPMG’s go-to guru on intelligent automation, says: “By 2020, AI technologies will be engaging in more complex processes compared to simple tasks. We are probably only about 10 years away from a world where AI is navigating a portfolio of processes, and effectively acting as the engine of a company, making operational decisions.”

That is a prospect that may enrage some print service providers and enthrall others. Traditionalists may regret that an industry as craft-based and culturally significant as print seems set to become subsumed into the computing industrial complex. For those who sell print as a price-driven commodity - even if they pretend they don’t

## **Too many managers say they’re taking a holistic view when they’re actually only looking at two things at the same time**

- this is probably not good news. The threat to them is best summed up by the famous quote from Amazon’s presiding genius, Jeff Bezos: “Your margin is my opportunity.” Their companies will become vulnerable to a disturbing array of new competitors, including printers from other sectors in search of new business.

Those who use their expertise and craft to innovate solutions that customers want - and that rivals cannot easily replicate - could flourish in this world of intelligent, automated ecosystems. How many staff they employ, on what terms and what those staff will do will differ from company to company.

The crucial question companies need to ask, Giles Pearman, a brand consultant who worked at Unilever before setting up his own company to mentor young businesses, advises is: “What is my unfair advantage?”

There is no right answer to that question - every company has its own strengths, and they might be technological or cultural -

but there is a wrong one: “We don’t know.” If you’re brutally honest with yourself, and come to that conclusion, the best thing you can do is develop one - before you go out of business. As Pearman says: “If you want to grow your business, you need to inspire customers with a truth that makes you different from and not just better than the competition. Being better is good but being different is more powerful because it harnesses the power of our emotions and connects to our limbic brain, the part that makes decisions.”

The best example of the power of difference, he says, is the TV ad Apple used to launch the Macintosh at the 1984 Super-Bowl: “The advert didn’t say anything about the features and attributes of a Macintosh or why it was better than an IBM computer. IBM were in fact better at building computers than Apple, so the Macintosh factually wasn’t better at all. But it was different. They persuaded people to think about computers in a new way, a way that was personal and not corporate. That was their inspirational truth.”

Paradoxically, in a marketplace where supply chains, networks and eco-systems are technologically automated, the ability to connect emotionally, personally, may make it easier to win clients. This realisation has already transformed product development at companies that sell to consumers - and is beginning to shape the way businesses sell to each other.

Companies, like consumers, are influenced by price (but often not exclusively so), time-poor, and bombarded by many, often conflicting messages, on a daily basis. Managers are also increasingly likely to bring their experiences as consumers into their work. Their expectations of speed are being reset by all those e-commerce sites that promise to deliver the next day, the same day, or within an hour or two. No print buyer would expect digital print to arrive within the hour, but their definition of an acceptable speed of is constantly being recalibrated. To cite just one example, Walmart has just tightened its suppliers’ terms: any company that ships a truck full of product has to the world’s largest grocer must do so within a specified 48-hour window 87% of the time or risk losing the business.

Many managing directors of print-service providers see things as they are and ask why? In future, technology will reward those who dream of things that have never been and ask why not.



# No Time To Be Isolationist

Claire White is innovation and creative consultant at Antalis, one of a growing number of companies looking to improve links between the print sector and creatives to better realise the myriad digital print possibilities.

“Give me half an hour.” That’s the gambit special design and visual merchandising expert Claire White took with Commercial Build Show organiser Nicola Robinson who didn’t see the point in talking with her about the relevance of digital print to the event. It worked. On the back of that request and subsequent conversation, Antalis - for which White has been innovation and creative consultant since May 2018 - ended up handling the entrance to the event, speaking there and even launching a book.

White is one of the growing number believing in making more concentrated efforts to better communicate with creatives, develop their knowledge base when it comes to digital print - and perhaps even grow demand, if not at least widen its scope.

“My role at Antalis is to spread the message about digital print possibilities. My job is not to sell anything, but to raise awareness of the materials in our portfolio and how it can impact projects,” says White. “I was brought on board because Antalis realised that printers are not talking the ‘up game’ early enough in the design process - whether that be for retail, interior design or whatever - and that to spread the knowledge about print media and applications possibilities they needed someone who could talk the talk with creatives. I’m used to being on their side of the fence so I know how to engage them, and the print sector needs to do more of that engagement for longer-term development.

“We somehow need to make creatives understand that there is so much more potential than they probably realise. The thing is, the further away the creative is from print, the less they know about it, because the story about what can be achieved gets diluted along the chain and they only get a shortened version of what can be done. I think it’s therefore important to reach out and inform them before they even start talking to a printer!”

But just getting in to talk to them is half the battle of course, which is where having an inside asset like White can help. “I don’t want to end up talking print,” she stresses. “The whole point is that I talk to them in their own language. I do know the technical possibilities of what our media can do, but I don’t talk to them at the deeply technical level a printer would. I’m not talking to the print procurement team but trying to push the message further up the creative chain.”

To help her do that White uses LinkedIn to engage with creatives and their representative bodies, and as her work with the Commercial Build Show indicates, she is pushing the envelope in terms of the events where she thinks visitors could benefit from the digital print possibilities message. In April Antalis created a stand at the VM and Display Show made totally of its printed Xanita product to showcase applications potential to those within the retail space. The following month Antalis was also at the POPAI Innovation Workshop for the retail sector.

Having just launched additional textile products for the interiors



markets, Antalis is also keen to spread the message to creatives therein, to which end it is again running its own interior design awards in 2019 - open to creatives and to printers. “The winners book gets used as a tool for me to then engage with other creatives,” says White, who believes we need a sea change in how the digital print sector presents itself to the wider world.

“On one of my first visits to a creative, I was told ‘Oh, I was expecting an old chap with a suitcase of samples.’ They were amazed I didn’t fit that image. I’ve found that I don’t only need to talk the talk, but dress like a creative too. We also need to go where they go. They don’t do print shows. Some of the largest creative shows aren’t really the biggest pull either - they like smaller events that they can dip into for an hour or two, find something novel and get back to their desks. So if we could have pop-up print pavilions that ignite their interest at those type of things it would be great.

“This industry spends thousands of pounds at print shows, telling visitors what they already know. Investment is going to the wrong places. We need to spend more getting in front of creatives. And do stuff that is experiential - we don’t really do any of that either.

“Designers and architects are very time poor, but with a little education and support, together we can open their minds to the possibilities of print.”



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