

PRINTINGUNITED  PRESENTS:

wide-format **SUMMIT**

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Wide-format Impressions

Keynote: **How to Thrive in a More Competitive Landscape**

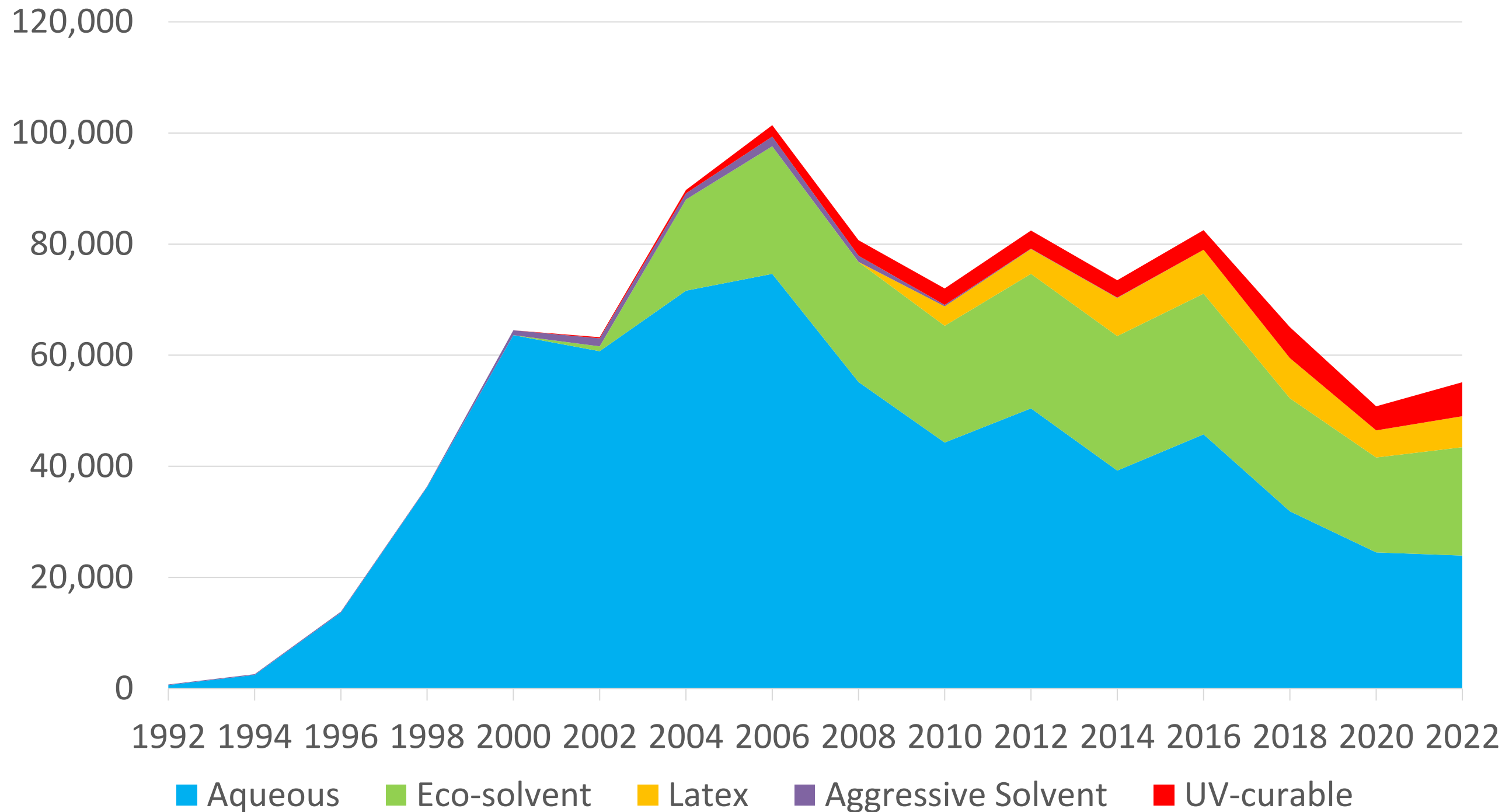
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WFG by Technology: Units 1992-2022 WW

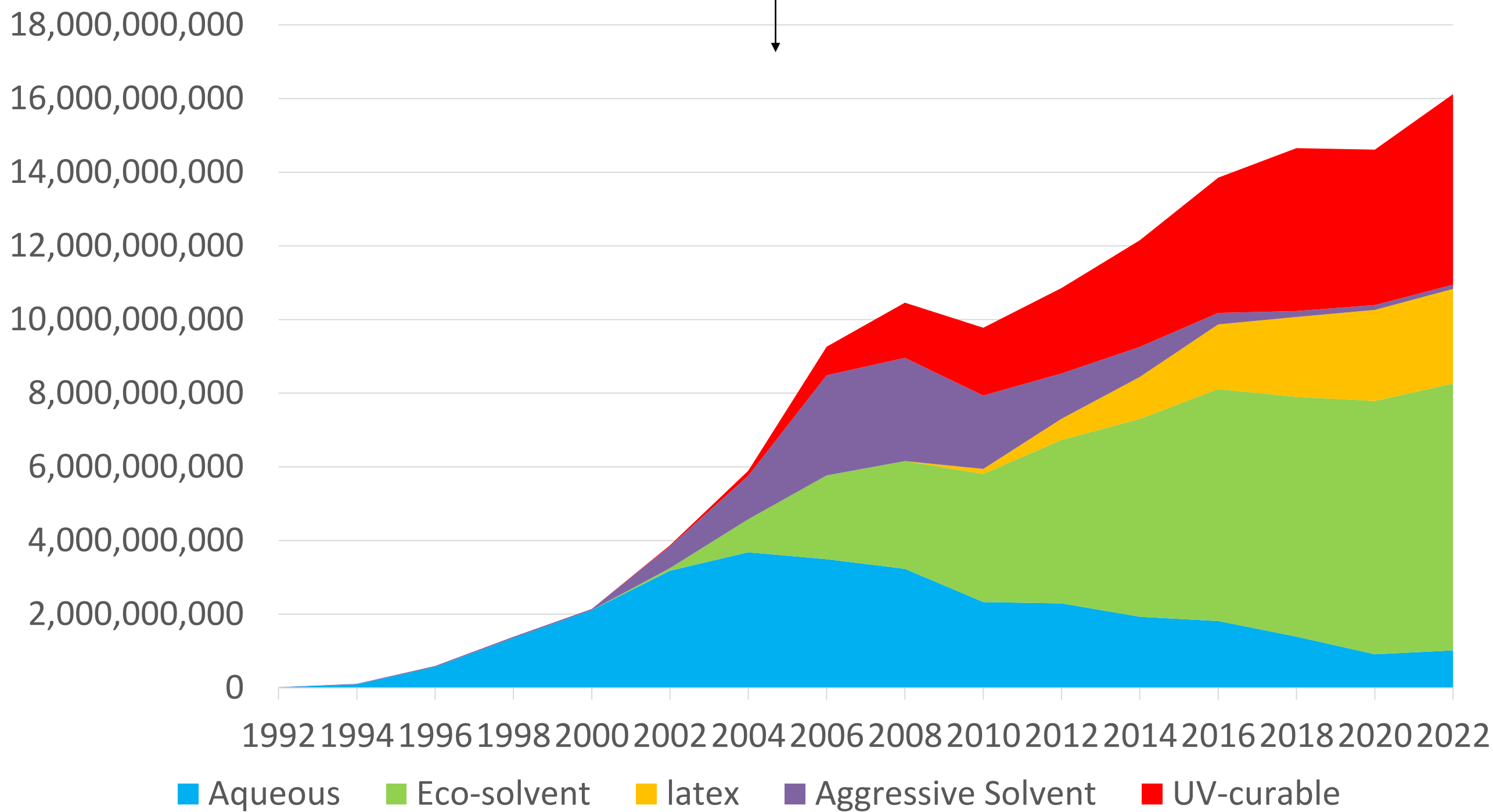
The demand for wide format units peaked after 14-years due to a technology shift to more productive ink technology



The Manufacturer view has little correlation to demand for WFG output; indicator of consolidation of volume

WFG by Technology: Square Feet 1992-2022 WW

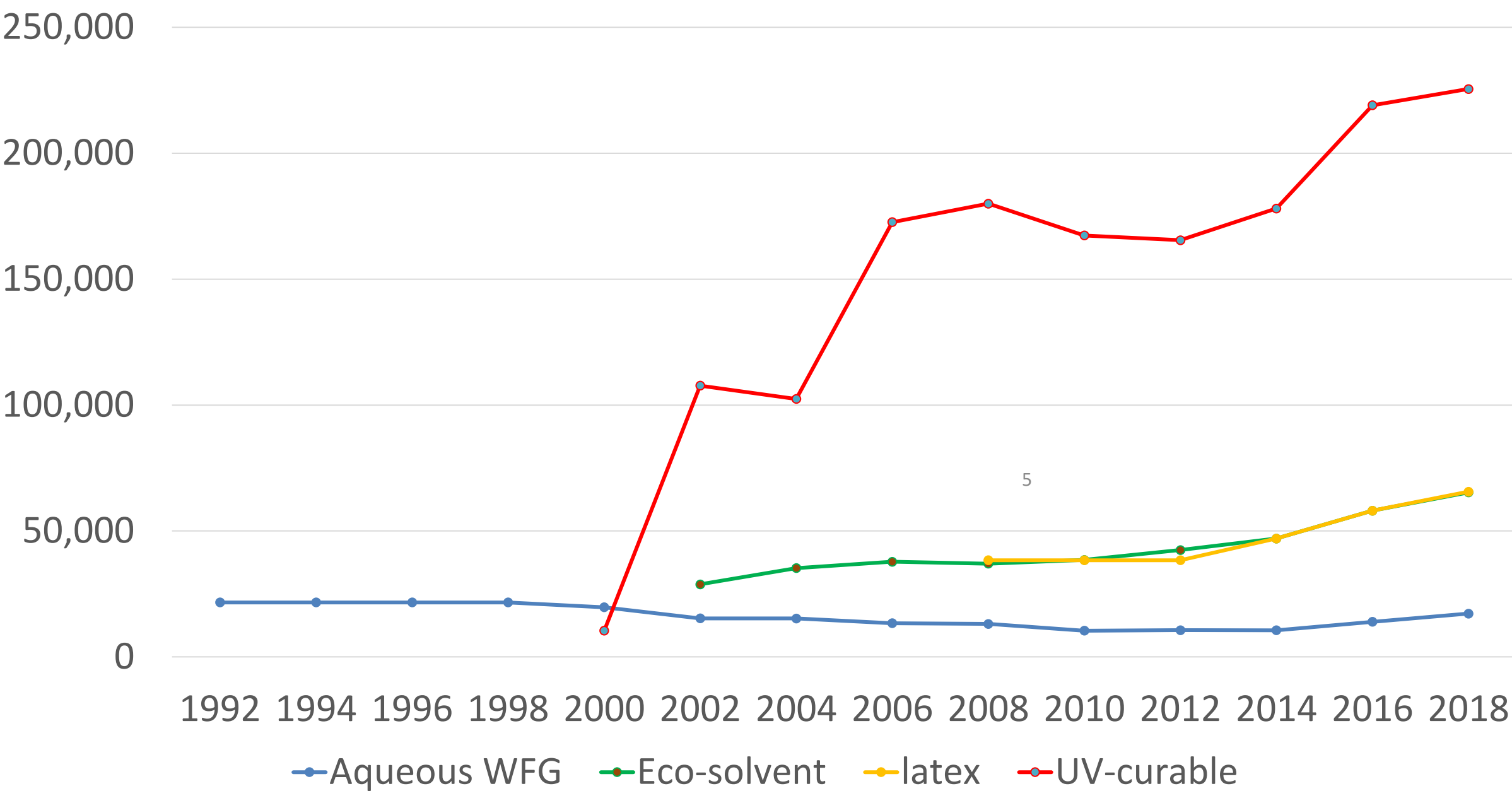
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WFG by Technology: Units 1992-2022 WW

Annual Square Feet Printed Per Printer in the Installed Base



You have to keep up with technology investments, or else you'll fall behind on productivity

How does one grow WFG Volumes?

- **Steal/Buy share**

- Make it easier to do business with you
- Become price competitive through automation/efficiency improvements

- **Move up the value chain**

- Finishing/ Installation services

- **Expand applications**

- Product expansion



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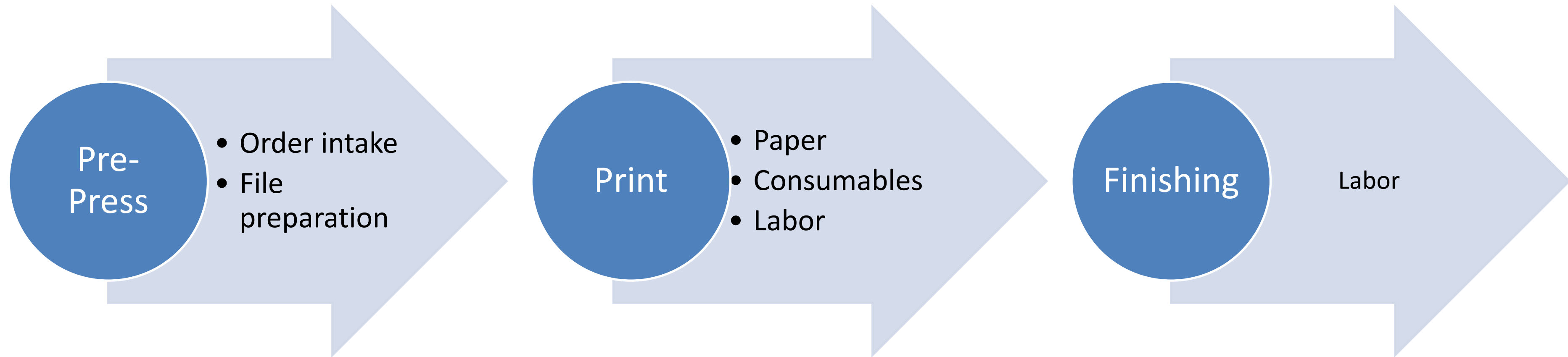
Become More Price competitive: Common Requirements

- Automation is non-negotiable
- Customers and partners will require real-time dashboard connectivity
- Different kind of labor: from press to data skills
- Faster Turnaround



Source: PrintPLANR

When is the last time you truly calculated your TCO from end-to-end, across your entire plant?



In an automated, short-run world, inkjet ink price becomes less consequential

An over-simplified TCO example

1,000 pieces	Screen/ Offset		Inkjet	
Order Intake	\$20	23%	\$20	24%
File Preparation	\$35	40%	\$20	24%
Paper	\$10	11%	\$10	12%
Ink	\$3	3%	\$20	24%
Labor	\$20	23%	\$15	18%
Finishing Labor	\$20	23%	\$20	24%
	\$88	100%	\$85	100%

- “Increases in screen/plate cost, energy cost, real estate cost sneaks up on you”
- “There is a real cost to inability to find qualified labor”
- “Opportunity cost to not being able to meet service level agreement requirements”

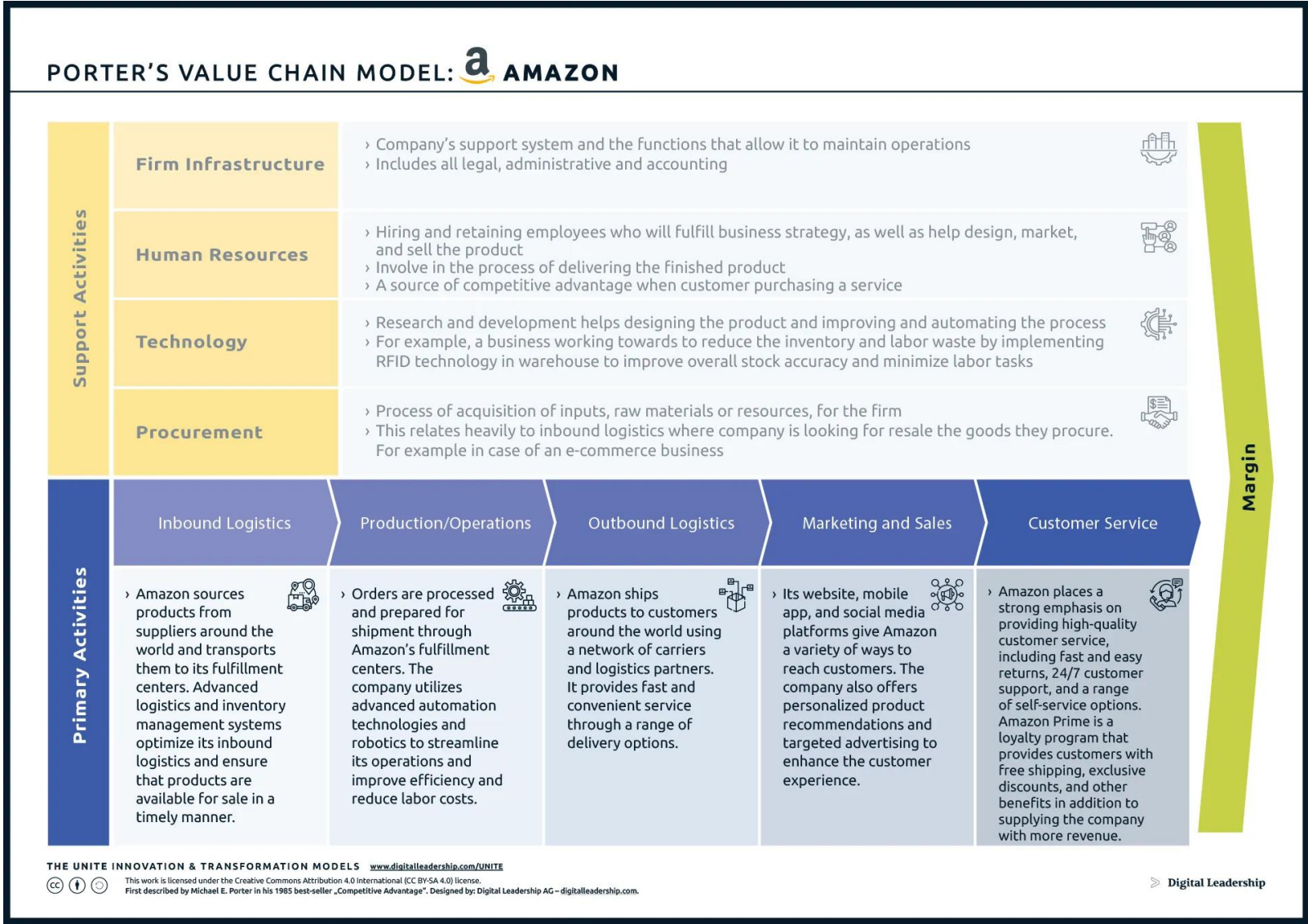
Moving up the Value-Chain

➤ Print got a lot more expensive for end customers

➤ So...

➤ It has to be right, offer more value

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Expand Applications



- **Specialty products**
 - 64” plus fine art prints
 - Dye sublimation on aluminum
 - Other
- **Vertical markets**
 - Automotive
 - Sports/Concerts
 - Trade shows
- **Wholesaling**
 - Corrugated POP displays, etc.

The Opportunity: Business Model Change...



➤ Print got a lot more expensive for end customers

➤ So...

➤ It has to offer more value

This is the moment we have all been waiting for....

- A moment to change the business model
- A moment to create additional value, revenue
- A moment to leverage the inherent benefits of inkjet printing