



# Future Opportunities and Challenges of Inkjet Technologies

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# Helping to Create the Specification for Next Generation Printers for the last 25 years

- IT Strategies, Inc. is a digital printing market research firm and consultancy, with a focus on non-consumer printer markets.
- Established in 1992 and under the same private ownership since that time, IT Strategies has been a partner of Inkjet production printing manufacturers in helping to identify, size, and qualify new market opportunities for Inkjet printing technologies



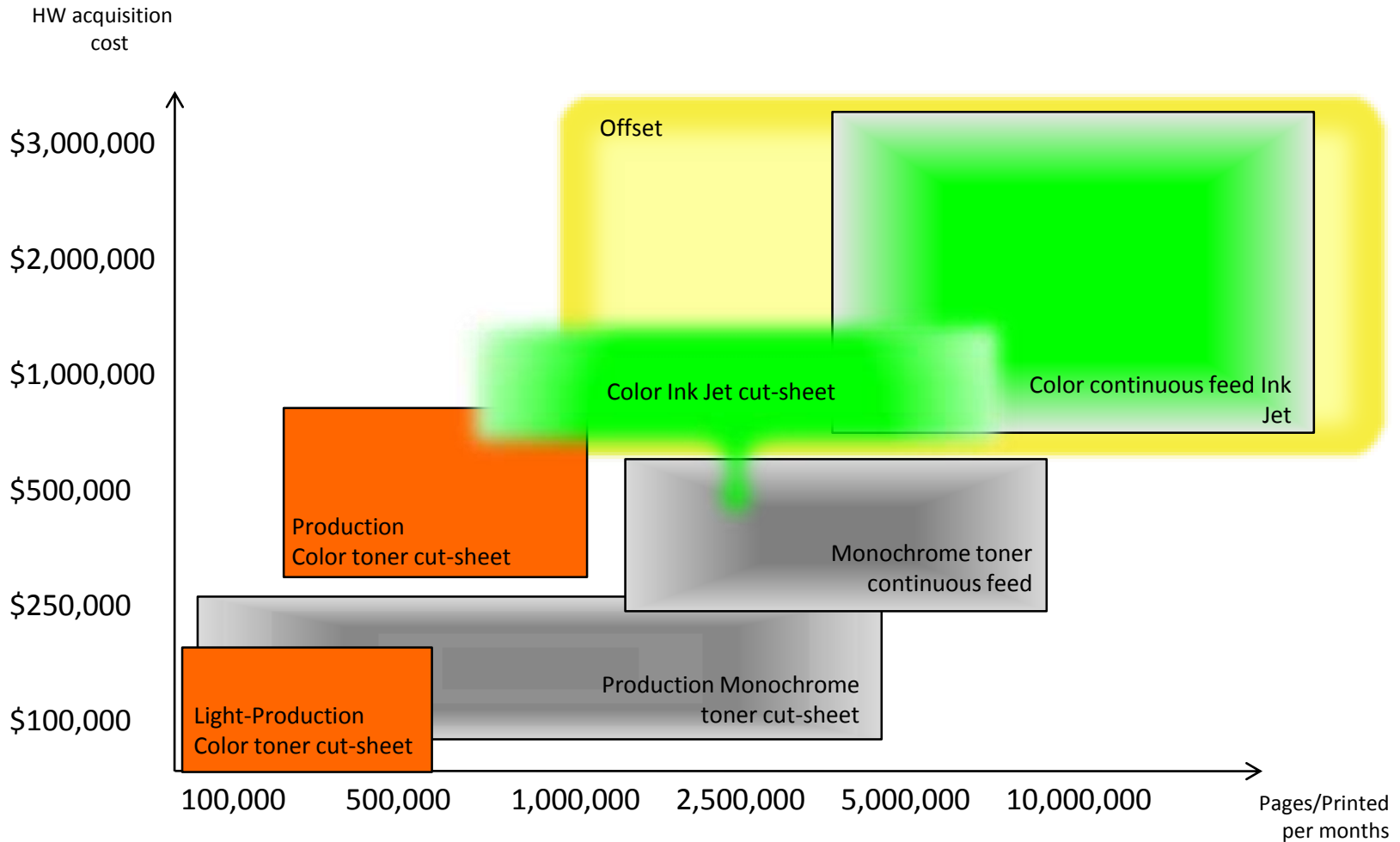
# The Surprise Quiz

- How much money do printers spend buying conventional (offset) presses, plates, ink, etc. annually, worldwide?
- How much money is spend worldwide buying ink jet printers, ink cartridges?
- Where is Inkjet technology used?

	True	False
Billboards		
Egg expiration codes		
Zara dresses		
Ceramic floor tile		
Body parts		
Replacement auto parts		
Newspapers		
Transaction statements		
Legos		

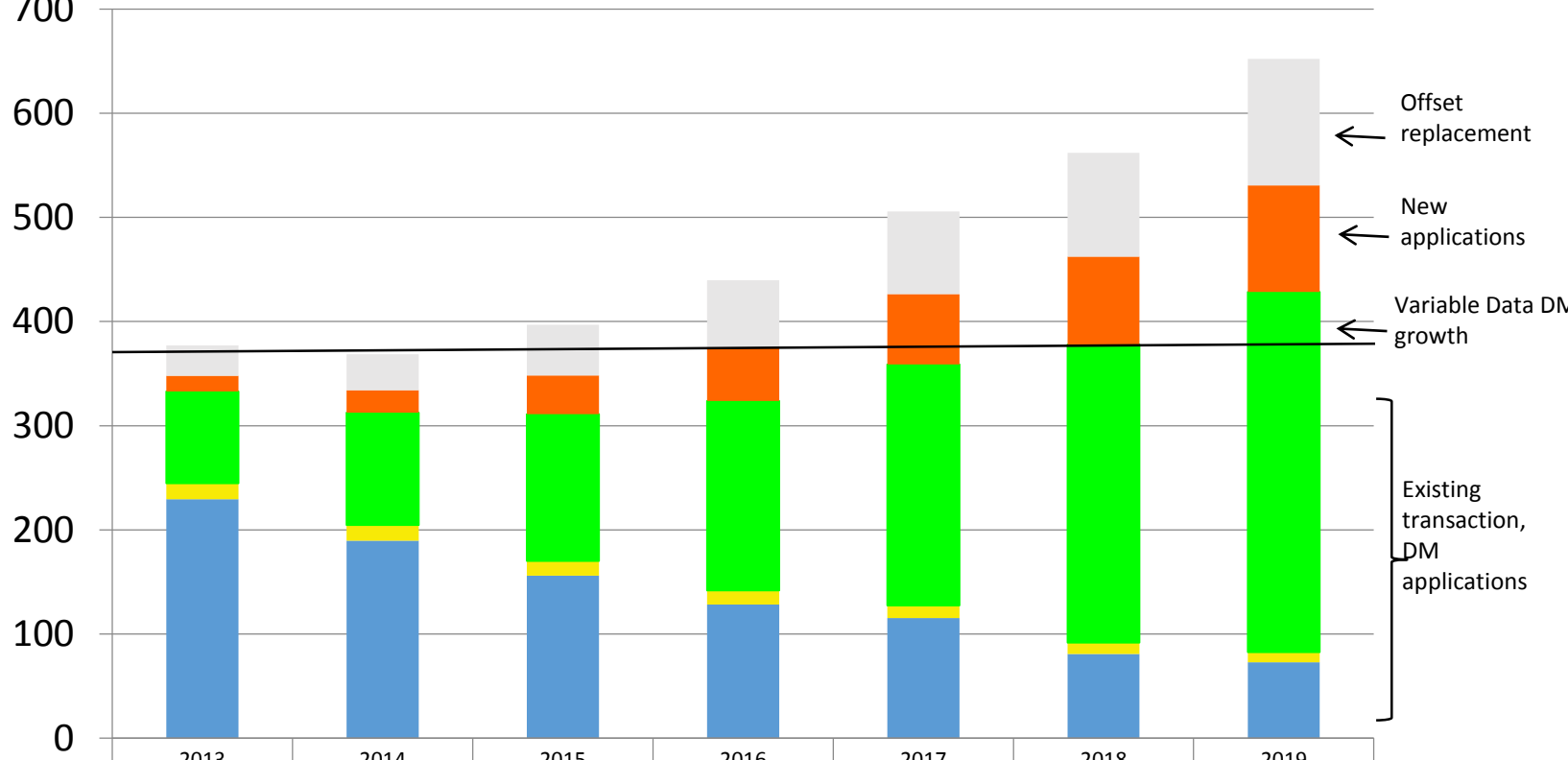


# The Market Fit of Inkjet



# Growth of continuous feed color IJ moving beyond mono toner replacement -2014-1019

Billions of letter-size simplex pages WW

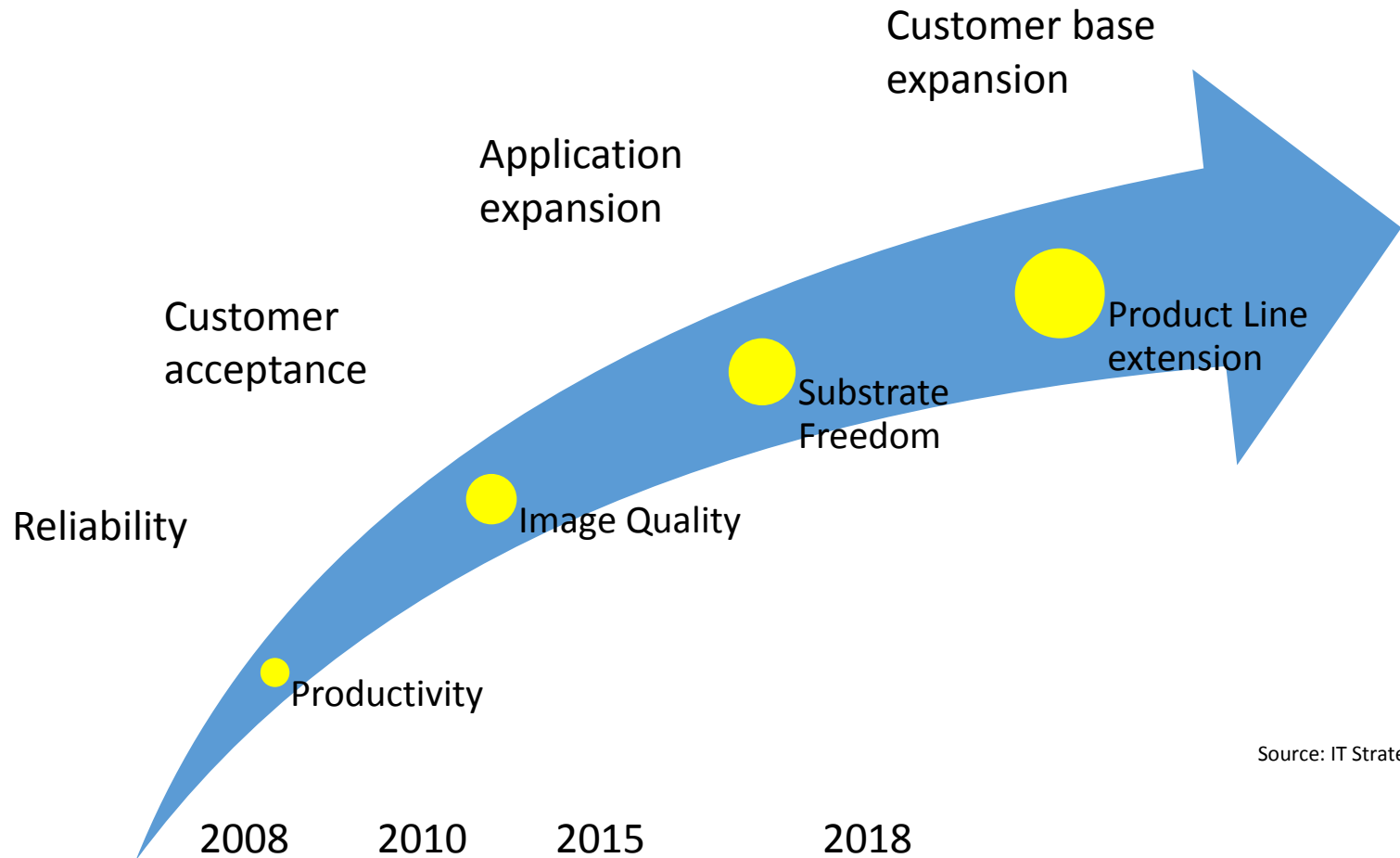


	2013	2014	2015	2016	2017	2018	2019
Book Ink Jet/Offset Replacement	29	35	49	64	80	100	121
New Ink Jet Application Pages	15	22	37	51	68	84	102
Transaction and DM Ink Jet	88	108	141	182	231	286	346
Color Toner continuous feed	15	15	14	13	12	11	10
Mono Toner continuous feed	229	190	156	128	115	81	73

Note: Excludes Graphic Arts and cut-sheet inkjet pages



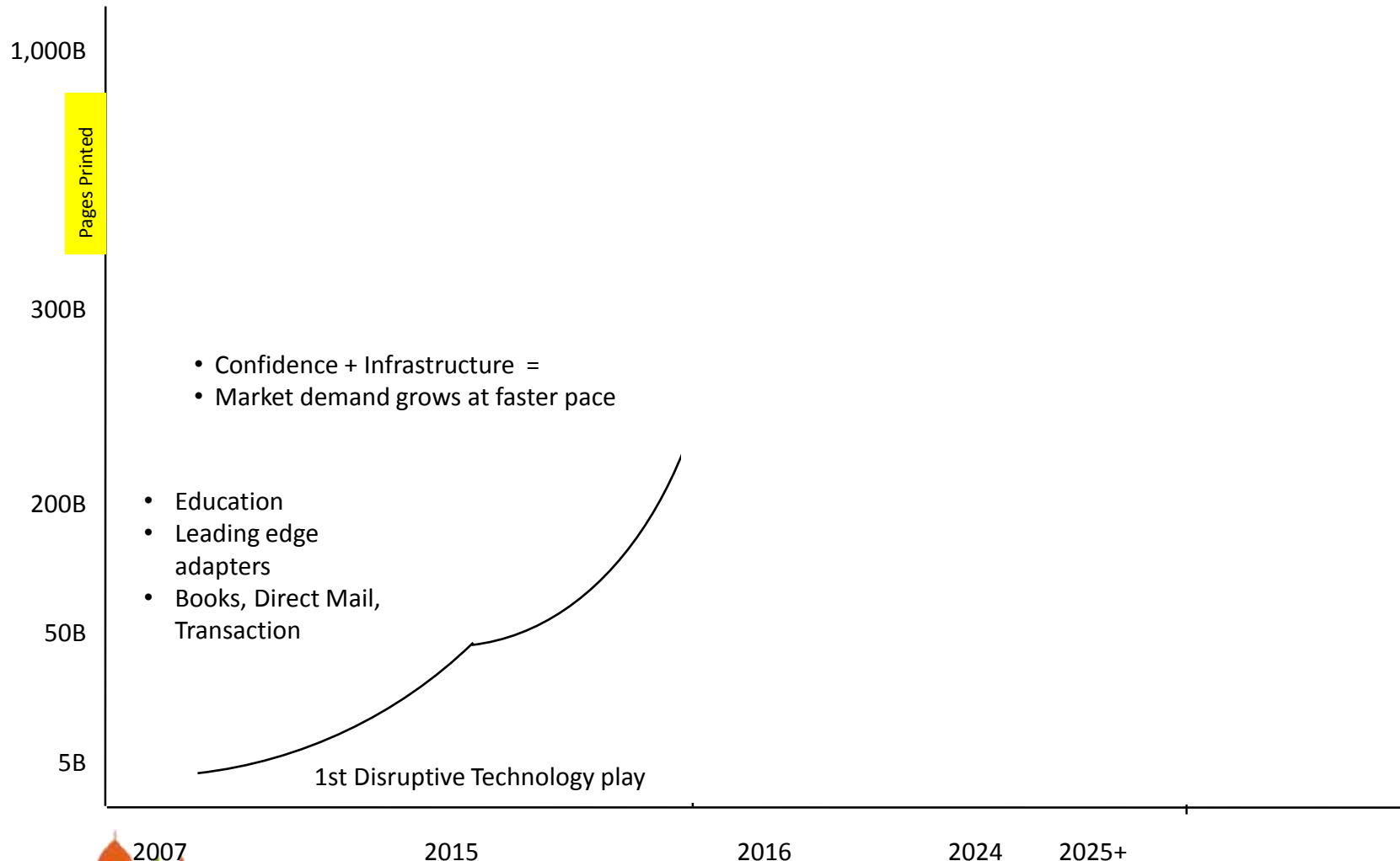
# The IJ Production Journey: From Acceptance to Expansion



Source: IT Strategies, Inc.



# Entering the 2<sup>nd</sup> Disruptive Phase of Inkjet Technology



# Top three ways IJ is changing the printing market

1. In a multi-channel, big data communication world, print has the final say. Ink jet is the only print technology that has the ability to print messaging just-in-time, with a high-degree of relevancy, in the mass volumes marketers require
2. The productivity of color ink jet technology is dramatically altering business models, particularly in the area of inventory waste reduction
3. The flexibility of ink jet is creating new, incremental, high value print applications not possible to create previously. Transaction, direct mail, and marketing collateral are merging into new forms of output never seen before, applications that have higher returns on investment for marketers than ever thought possible.





# I believe...

“The biggest cost to deploying production ink jet technology is the learning curve. In today’s hyper-changing world of marketing/communication, the key competitive advantage is staying ahead of the cost curve rather than chasing it down”



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