

The top trends driving big opportunity



GLOBAL TRENDS DRIVING THE LARGE FORMAT PRINTING INDUSTRY





Why follow when you can lead?

Successful entrepreneurs are those who set the pace for others to follow.

Companies that fail to move quickly to adapt to the business environment won't survive. With the industry and the market constantly evolving, keeping pace depends upon an in-depth understanding of your customers' needs.

Three megatrends shaping the future of the print industry



Sustainability

73% of millennials are willing to spend more on a product if it comes from a sustainable brand.¹

A consumer base of such magnitude will reward industries that practice sustainability.



Globalization

By 2025, half the Fortune 500 Companies will be headquartered in today's emerging markets.²

How and where companies design, sell, and manufacture products will be about thinking globally, but acting locally, and delivering promptly.



Ecosystems

Digital platforms are transforming markets. 3 out of 4 people are convinced that they will increase their sharing of physical objects and space in the next 5 years.³

The top 10 trends
shaping the large-format
printing industry





Print on demand

Digital technology is driving on-demand printing, replacing the print-to-stock model. The combination of the Internet and new digital platforms is driving growth in e-commerce and web-to-print applications. It's a critical time for offline print service providers to start measuring and growing their online business.

Look into growing your online business by at least 50% by the end of the year, so that you're positioned to compete with new, 100% digital providers.

1

Home



Introduction



Print on demand



Personalization



Same-day delivery



Local for local



Vertical integration



The rise of fabrics
& bio-materials



Paper will be back



Water-based inks



Digital screens.
Driving print,
not replacing it.



Values and transparency



Personalization

In a global, commoditized world, you've got to find new ways to add value to your customers. Digital printing is ideal for addressing the trend toward personalization, from versioning to customization. In any of the forms, the value created helps to differentiate against mass-produced prints and will increase brand value, customer satisfaction, and loyalty.

2



Home



Introduction



Print on demand



Personalization



Same-day delivery



Local for local



Vertical integration



The rise of fabrics & bio-materials



Paper will be back



Water-based inks



Digital screens.
Driving print,
not replacing it.



Values and transparency





Same-day delivery

Thanks to the Internet and digital platforms, customers expect to receive goods quickly. Digital printing has driven lead times down from weeks to days, and together with the growth of online orders, from days to hours. As online orders grow, lead times are being scrunched from days to hours, compelling print service providers to deliver on the same or next day.

Look into how you can meet your customers' expectations for same-day delivery.

3

Home



Introduction



Print on demand



Personalization



Same-day delivery



Local for local



Vertical integration



The rise of fabrics & bio-materials



Paper will be back



Water-based inks



Digital screens.
Driving print,
not replacing it.



Values and transparency





Local for local

The demand for centralized mass production continues, driven by economies of scale in low labor rate countries.

At the same time, the demand for personalization and same-day delivery is driving local production that reduces logistics costs and delivery times.

While the demand for centralized mass production will remain, the growth and value-addition will be created by local production moving to a distributed network model of micro-factories located close to the customer. We expect this model to go mainstream towards 2020.

4

Home



Introduction



Print on demand



Personalization



Same-day delivery



Local for local



Vertical integration



The rise of fabrics & bio-materials



Paper will be back



Water-based inks



Digital screens.
Driving print,
not replacing it.



Values and transparency





Vertical integration

Consolidation in the printing industry will continue, moving from horizontal mergers forming larger and more global companies to vertical mergers focused around the implementation of an end-to-end strategy.

Vertical consolidation will occur not merely from a capacity point of view but also at many levels, from equipment manufacturers to print providers, offering end-to-end solutions - from design to production.

5

Home



Introduction



Print on demand



Personalization



Same-day delivery



Local for local



Vertical integration



The rise of fabrics & bio-materials



Paper will be back



Water-based inks



Digital screens.
Driving print,
not replacing it.



Values and transparency



The rise of fabrics & bio-materials

In printing, the media or substrate has the most substantial environmental impact. PVC is the least sustainable option, and is already being banned in a few countries.

More eco-friendly alternatives are beginning to take centre stage, such as polyester-based fabrics. With the fading of PVC and the rise of fabrics and bio-materials, the emergence of new categories of bio-degradable substrates is also on the rise.

6



Home



Introduction



Print on demand



Personalization



Same-day delivery



Local for local



Vertical integration



The rise of fabrics & bio-materials



Paper will be back



Water-based inks



Digital screens.
Driving print,
not replacing it.



Values and transparency





Paper will be back

Stringent regulations on sustainability and printing materials are resulting in a rise in paper-based applications. New durable materials will provide attractive alternatives to PVC banners or boards, for a 3-6 months campaign.

Look for growth in paper-based applications, especially in indoor retail, POP segments, and in outdoor advertising.

7

Home



Introduction



Print on demand



Personalization



Same-day delivery



Local for local



Vertical integration



The rise of fabrics
& bio-materials



Paper will be back



Water-based inks



Digital screens.
Driving print,
not replacing it.



Values and transparency





Water-based inks

The large-format printing industry continues to move to water-based inks for the advantages over solvent and UV-curable inks in terms of employee health and safety.

Stricter regulations are compelling ink manufacturers to focus on developing safer, more sustainable inks, mostly water based.

8

Home



Introduction



Print on demand



Personalization



Same-day delivery



Local for local



Vertical integration



The rise of fabrics
& bio-materials



Paper will be back



Water-based inks



Digital screens.
Driving print,
not replacing it.



Values and transparency





Digital screens. Driving print, not replacing it.

Proliferating digital screens are, in some cases, replacing printed applications like outdoor billboards and high-value store displays. However, with a high relative cost and the potential to distract customers with moving images, this trend may actually contribute to the growth of print. For every screen placed, several new applications are emerging as an opportunity for print.

Look for a growing trend towards creative printing around the surfaces of the screen.

9

Home



Introduction



Print on demand



Personalization



Same-day delivery



Local for local



Vertical integration



The rise of fabrics
& bio-materials



Paper will be back



Water-based inks



Digital screens.
Driving print,
not replacing it.



Values and transparency



Values and transparency

Social media networks are boosting consumer power. Consumers buy products not only based on quality and price, but also based on company values and transparency.

Bring your values to the forefront, and provide your customers and end users with the transparency they need to evaluate your actions.

10

Home



Introduction



Print on demand



Personalization



Same-day delivery



Local for local



Vertical integration



The rise of fabrics & bio-materials



Paper will be back



Water-based inks



Digital screens.
Driving print,
not replacing it.



Values and transparency



These ten global trends inspired the landscape of the large format print production business

We're embracing these trends to help you keep pace with the accelerating speed of innovation and to help create new opportunities for your business.

It's our goal as a company to make life better for everyone, everywhere.



For more information about HP Latex printers, visit: [HP.com/go/latex](https://www.hp.com/go/latex)

Created by HP's graphics business worldwide marketing, based on industry research and internal documentation.

Sources

1. https://www2.deloitte.com/content/dam/insights/us/articles/platform-strategy-new-level-business-trends/DUP_1048-Business-ecosystems-come-of-age_MASTER_FINAL.pdf
2. <https://www.forbes.com/sites/sarahlandrum/2017/03/17/millennials-driving-brands-to-practice-socially-responsible-marketing/#4e19a684990b>
3. <https://www8.hp.com/us/en/hp-labs/innovation-journal-issue2/megatrends-shaping-the-future.html>