

Taking a WIDE View of Profits



Squeezed by competitive and market pressures, more commercial printers than perhaps ever before are taking a good, long look at the marketability and profitability of expanding their services to include wide-format printing—and they're liking what they see.

When looking at large-format printing presses, says Raymond Prince, Vice President and Senior Consultant, Operations Management for NAPL, "the message is that *they are back*. At one time we did have roughly 125 76- and 78-inch presses operating in the country. That was back in the '60s."

Even then, Prince notes, wide format "was economical to do, but so much work was better suited to the 40-inch press when it came to image fit. We did not have paper distortion factors to deal with on the 40-inch press as opposed to big ones. The buyers were demanding higher and higher printing quality and the large formats at that time could not produce it." Beyond that, equipment speeds were good, Prince recalls. The 40-inch presses were fast. "The big ones, by comparison, were slow—a low of 5,000 an hour and a high of 7,800 an hour."

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Getting More Output

Today, however, all that has changed. "We are seeing the 60-inch-and-above presses selling rather well," says Prince. The 63-inch press, as an example, sells primarily in the folding-carton market. Basically it takes the same number of people to run that press as a 40-inch press, but they're getting so much more output with the same amount of labor. And the speed is up there: you're looking at speeds of 14,000 an hour on those presses."

Large wide-format printers are used to produce packaging—both litho-lamination and the cartons themselves—retail-related signage, point-of-purchase and free-standing displays, "multiple-up" signatures and ganged work, labels, catalogs, textbooks, and other book printing applications. The work can be done on plastic, vinyl, and

textiles, as well as paper, and the quality level can be extraordinary.

Printers have found that large-format machines can produce as much as double the amount of work, in the same amount of time, with the same quality, and with the same makeready times, as a conventional 40-inch sheetfed press.

And they can allow sales- and marketing-driven printers to diversify into more lucrative markets, such as point-of-purchase displays, with higher gross margins.

Adam Florek, Research Analyst, Wide-Format Printing Advisory Service for Lyra Research, Inc. in Newton, Mass., estimates that total wide-format revenue was approximately \$9.6 billion in 2008, although this may serve as a high-water mark for the near future since many analysts expect total wide-format inkjet revenue to decline to approximately \$8.5 billion in 2012. The drop, they suggest, is due primarily to sagging demand for low-end aqueous and solvent printers. “It is also misleading,” says Florek, “since we expect revenue to fall to \$8.5 billion this year alone before stabilizing over the next few years.”

Lyra researchers believe wide-format sales are benefiting overall from print service providers looking to diversify their service offerings. “Commercial printers are one example. Sign shops, photo labs, reprographers, and even quick printers have introduced wide-format printing to target a broad range of applications,” he explains.

Point-of-purchase (POP) materials, transportation graphics, and event signage are some of the applications that have lured printers to wide-format printing, Lyra reports. “More than anything else, firms are looking to stable markets. Hence, POP is especially attractive since retailers constantly require new signage on a massive scale.”

Evidence of the growing popularity of wide-format printing can be seen in the pre-show interest in the Print 09 Wide Format Pavilion, a special “show within a show” that will demonstrate the latest advances in wide-format technologies, including flat bed and super high res roll-to-roll printers that produce vibrant images on a grand scale.

A Bigger Step

Transitioning into large format is “a bigger step than just going to bigger paper,” explains Joe Kulis, Chief Operating Officer for The Garvey Group in Niles, Ill. “There are a lot of ancillary processes that go on. It’s a bigger customer base with different expectations, and it requires a fair degree of homework before getting into it. While it’s still using four-color process printing on paper, or non-paper substrates, the requirements for getting into it make it trickier than what it first appears to be.”

Kulis sees growth in large format continuing, but is quick to caution that “as much as anything else, I think it’s

dependent on what happens in the economy, how people decide to allocate their marketing budgets. Like everything else, it’s under pressure right now.”

There are a couple of notable differences between digital and offset when it comes to large format, he explains. One is that “offset on paper in many cases still produces a finer image than digital,” says Kulis. “Now, you have to be careful, because most of this work is made to be seen from a distance, and once you start stepping three, four, five feet away from a piece it becomes more difficult to differentiate between the inkjet and the offset. We do have an inkjet imager in the Garvey group’s Milwaukee plant, and they do some wonderful work there, as well.”

In addition, offset remains “a much faster process,” Kulis says. “When you start talking about having to produce 400, 500, 800 pieces, let alone 2,000 pieces, offset is still a lot quicker.” At those quantities, offset “is still much more economical.”

“There is better opportunity for greater profitability in large format because there are fewer of us who do it,” says Steve Rickett, Chief Operating Officer of Unimac Graphics in Carlstadt, N.J., which has been doing large-format printing since 1960. “The 40-inch market is saturated with sheetfed presses, so once you get into the people who have 56s, 64s, and 78s, it’s mostly people who were in packaging or the display business.”

According to Rickett, there is no shortage of candidates when searching for potential wide-format customers. “You can say that almost all the *Fortune* 500 companies use it. Just about everybody uses some sort of large format.”

The key to success today, Rickett emphasizes, is experience. Large-format printing “is not an easy thing to learn how to do, and there aren’t very many people left who know how to do that kind of printing because the computer world has taken technical people and minimized them to where training in the basic printing skills and color have diminished.”

“I would say that the large-format presses are as good as the smaller running presses at this point,” suggests Lisa Hirsh, President/Chief Executive Officer of Accurate Box Company, Inc. in Paterson, N.J. “They run as quickly. The makereadies are as efficient.” The manufacturers “really mastered the technology.”

Her company makes large packaging, so large format was always necessary for her customer base,” Hirsh says.

“A bigger customer base with different expectations.”

“Clearly, if you’re printing 8-1/2-by-11 sheets you may not need a 64-inch press, so it depends on your customer base.”

Accurate Box Company works primarily with large consumer companies, many in the food and beverage industry, and has been doing large-format printing “probably since we got involved with printing back in the 1950s,” says Hirsh. The company, which operates a 300,000-sq.-ft. facility staffed by 170 employees, produces high graphic corrugated packaging. “We didn’t always do that, though. We used to be in the folding carton business. Now we do only litho-laminate packaging.”

Hirsh says that one of the best moves she and her company have made has been buying new equipment “because it’s faster and more efficient. It’s all computer generated at this point. It’s really brought our waste down and increased our productivity.” ROI, Hirsh points out, depends on the presses themselves. “I think most of the large-format litho presses are in the \$5 million range.”

‘Hot Head’ Yields Phenomenal Color

“When it comes to wide format there are three types,” explains Ray Prince, NAPL Vice President and Senior Consultant. “One is printing presses in the XL to XXL size. Then there is the wide-format roll-to-roll machines, which are for building wraps and signage, so you can go 10 feet wide by any length you want to go.

“The third type is the flatbed, which is basically for printing on rigid material. It could be Styrofoam, board, fabric, or anything that is moderately rigid that you would place on a large table and then do inkjet on that substrate. The reason for the flatbed is that you don’t have to laminate the stock to anything; it’s already on the wood, the metal, whatever it’s going to go on.”

As for the roll-to-roll variety, “the hot head is the XAAR head,” says Prince. “It is a very high resolution, and can really give you some pretty phenomenal color. They’re selling very well. It’s the highest quality, so a lot of people who used to go up on a printing press to get that kind of quality for short runs will use the machine with the XAAR head. Now many manufacturers buy that head and then put it into their machines.”

While noting that a lot of printers are interested in flatbed machines—“where it prints directly onto different types of substrates on flat boards of wood or steel, as opposed to the rolled media that has dominated the large format for so many years”—price is thus far proving an obstacle, says Dave Thomas, President of Ambient Graphics in Culver City, Calif.

“The biggest problem I face is that in this economy I can’t afford to get that equipment. The price has come down, and there are options that are more affordable, but the cheapest one you’re going to find is around \$70,000. It’s expensive in a market in which you’d be buying the equipment and then trying to find the work, which is not a good business model,” he adds.

Accurate’s most recent equipment addition was a seven-color KBA press.

Virtually Anything

“The thing with large format is that you can load virtually anything into the machine and print on it: fabric, vinyl for a banner, or adhesive-backed stuff for vehicles,” says Dave Thomas, President of Ambient Graphics in Culver City, Calif. “It’s just a matter of knowing the media, and then the inks.

“There are really four different types of inkjet printers out there,” he continues. “There is the solvent printer, and we can throw the eco-solvent into the same category. Then there are the UV printers, which people like because it comes out cured and dried right away and you don’t have the drying problem. Then there is dye-based, which is where the industry started, but it’s not water-resistant so you have to throw lamination over it and it’s not UV

protected. It’s more for indoor applications. Then there are the pigment-based inks, which is the archival stuff that you would use for artist’s reprints.”

Large format was a big piece of Ambient’s business, Thomas recalls, but has dwindled along with the national economy. He and his colleagues, he says, “have to kind of frame things in terms of what they were like a year-and-



Dramatic wide-format output at Ambient Graphics, Culver City, Calif., President Dave Thomas notes that the company prints on numerous substrates for a variety of large-format applications because the same equipment produces everything “from graphic stickers you put on the floor to stuff you put on vehicles—anything that needs to be printed big.”

a-half ago as opposed to what they're like now." Back then, the company was notching \$50,000 to \$60,000 a month with large-format projects, or about 75% of total revenue. Last year, however, large-format business dropped by more than 30%, a descent that has continued in 2009, Thomas notes.

Ambient first entered the large-format segment in the early '90s when it began to pick up speed, Thomas recalls: "That was when the affordable equipment came out. Of course, what was affordable then is expensive now." With technology driving the graphics business and end users increasingly wanting to put what they were seeing on screen into different media, large format grew.

Thomas' company offers a variety of large-format applications "because the same equipment does most all of it—anything from graphic stickers you put on the floor and walls to stuff you put on vehicles, things you hang, like outdoor banners, point of purchase applications and other in-store graphics; anything that needs to be printed big. The thing that makes a difference is, if you're going to do thousands of something you might want to go to screen or offset printing as opposed to inkjet printing."

New Venues

The investment can be sizeable, Thomas points out. "You're going to need to get the finishing equipment to go with it. At the entry level, if you're seriously going to get into it, I would say you're looking at an investment of at least \$70,000." The labor requirements are easy, he adds. "One person can pretty much do the whole thing."

Space, however, is an important consideration. Doing large-format work "needs space to lay big jobs out, so if you don't have the space you've limited your capability to do some jobs." Success or failure may "come down to how creative you can get when it comes to moving big things around in a small amount of space. To comfortably and efficiently operate in a large-format environment you need a table space to lay things out."

Thomas believes profitability of large format projects is "probably around the same" as more conventional work. "In this industry if you're making a 5% profit you're doing really well."

Wide format's output versatility continues to open new profit venues. In the XXL 73- and 81-inch sizes, notes NAPL's Prince, "We're finding markets in certain areas. For example, in display signage, where someone may come to you and say, 'Gee I need 5,000 signs.' Well, if you go on an inkjet printer and print 5,000 signs, your cost per square foot is so doggone much money it isn't funny, and inkjet inks are exceedingly expensive. Therefore, going up on a printing press makes all the sense in the world."

Many printers are using wide-format for printing signage on the back of plastic. That material, Prince adds, is "exceedingly expensive, but we can do it now and still maintain perfect registration and put out a superior product. We still see conventional billboards, which are printed on these 81-inch presses."

Prince is also finding that 60-inch-plus size book printers are adopting it. "In fact, some have adopted the 73-inch press. Why? Color, and some feel it's an easier

“Retailers constantly require new signage on a massive scale.”

◀ There is no shortage of candidates when searching for potential wide-format customers since "nearly every *Fortune* 500 company uses it," notes Steve Rickett, Chief Operating Officer of Unimac Graphics in Carlstadt, N.J., which has been doing large-format printing since 1960.



◀ New faster and more efficient wide-format equipment has "really brought our waste down and increased our productivity," notes Lisa Hirsh, President/Chief Executive Officer of Accurate Box Company, Inc., Paterson, N.J., which produces litho-laminate packaging for large consumer companies, many in the food and beverage industry.

book to put together from a stitching and stock handling standpoint. Maybe you'll have three men on a 73-inch press as opposed to two on a 40-inch, but when you start looking at the output that those three men can deliver, it's tremendous because the sheet size is so much bigger."

According to Eric Frank, Vice President Marketing for manufacturer KBA North America, large- and super-large format presses are being equipped with successful and proven features found on conventional 40-inch sheetfed models. Perfecting presses, once only found on 40-inch and smaller units, are now available on large-format models, and UV lamps and hybrid ink technology are becoming increasingly popular.

Roll-to-sheet feeders equipped to large-format presses allow a printer to be economical as well as productive, he explains. Printers are able to buy large rolls of paper and feed them through the press to be sheeted according to the size needed. This gives the printer the ability to be both efficient and add capacity. Inline perforating, scoring, and

slitting are further accessories that are helping to make large-format presses popular.

Another key has been the amount of automation employed on press. Manufacturers have automated almost the entire press operation, allowing these larger presses to duplicate the quality, productivity, and waste savings of a conventional 40-inch size.

Printers who are seeking to install a large- or super-large format press also need to equip their plants with the necessary auxiliary equipment and upgrade their plate-making ability, material handling, and finishing areas.

“Almost all Fortune 500 companies use wide format.”

A Different Mindset

Large- and super-large format presses are one of the fastest growing segments of the graphic arts industry, according to Frank, who recently wrote about the trend and noted that these presses, which range in size from 51 to 81 inches, have in the past been used mainly by packaging printers who needed the size and format.

“Today, we at KBA, are noticing that all types of printers are looking at the large-format segment with a different mindset than they did just a decade ago. The acceptance of larger press formats is due to newer models with more automation and state-of-the-art technology—and printers who are realizing that they can take these presses and produce consistent high-quality work, in less time, with huge benefits and great efficiencies.”

Also helping fuel the popularity of large-format presses is their ability to print on a variety of substrates. In the past, these presses could handle board stock well enough to produce cartons and packaging. But, with the increased automation on the press, large-format models are able to handle a variety of substrates.

Wide Format Takes on a Green Tint

Wide-format production printing is shifting to cleaner, less harsh inks, particularly UV-curable ink, according to Adam Florek, Research Analyst, Wide-Format Printing Advisory Service for Lyra Research, Inc., Newton, Mass. In fact, one reason for the popularity of UV-curable devices is “the perception that it is a relatively ‘green’ technology,” he explains. “Concern for the environment is factoring the choice of what printer to buy.”

Printers report seeing an increase in the number of customers who inquire about the green aspects of the print process. Corporate customers and architects, says Florek, “are especially likely to request a print process that has a smaller carbon footprint.”

Lyra says that UV-curable ink is responsible for much of the wide-format market’s growth. The ink, which ultraviolet lamps cure to adhere to the substrate, is “tremendously versatile and can adhere to a wide range of rigid and flexible substrates. Hence, it is easier for some print service providers to try printing on new substrates.” In turn, printers can target new types of customers.

The research firm also notes that wide-format printer manufacturers are developing new types of ink that are less environmentally harmful and that can broaden the capabilities of wide-format printers. In 2008, for example, HP released a printer that uses its proprietary latex ink technology. “The ink is supposed to emit fewer VOCs than UV-curable printers. Océ developed Crystal Point technology, which is similar to Xerox’s solid ink technology, and has been initially leveraged in a printer meant for reprographers.

“For its part, Xerox showed its ‘cured gel’ technology at last year’s Drupa, which will probably be used in a digital screen printer one day,” Lyra notes. “We expect each of these ink technologies to be marketed to multiple markets. It is far too early to say, but the possibility exists that these technologies may prove to be disruptive.”



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“Large format is an ideal means of being able to continuously catch the eye of the consumer at a time when advertisers want to maintain maximum exposure at a low cost,” says Frank. “Traditional markets, such as the book and packaging sectors, continue to use large-format presses as well as new markets, such as poster, point-of-purchase display work, and sign printing.”

Future Growth

KBA “sees a large number of customers buying large format presses to complement their 40-inch presses,” says Walter Chmura, the company’s Vice President of Technical Sales. “Printing companies are looking to have greater flexibility to attack multiple markets. The reason for this is the amount of sellable product that is produced on a daily basis. Owners want to get into new market segments that are more profitable. All printers want to differentiate themselves, and the 40-inch market is very competitive in North America.”

Further, Chmura continues, printers “like the fact that large-format machines open up new markets, such as packaging, gang commercial work, POP, display, and images that cannot be produced on a 40-inch machine. The printers can gang runs and use multiple layouts on a large-format press. The layout on a large format press is the key to minimizing substrate waste created while trying to produce the same piece on a 40-inch press.”

Garvey Group installed its first large-format press nearly six years ago. Management had decided to go in that direction, says Kulis, because “we were looking at where the future growth opportunities were going to be. We were at that time in the direct mail market, and we were looking for areas we felt were potentially under-served.”

After looking at large-format equipment, he continues, executives found that competitors “had a lot of older equipment. We made the decision that it might be good to start to invest in new large-format equipment with improved technology. That was the primary driver, looking at under-served customers.”

Garvey prints litho labels, which are used primarily

on large boxes and retail displays. “Some of the signage is produced with corrugated backers,” Kulis says.

“We’re printing the labels that go on top of

them.” The company also makes top sheets that are used as part of the corrugated manufacturing process. “We do not print, fold, assemble, and die-cut packaging,” he adds. “We print the top sheets and litho labels. Most of our customers are in the business of doing the converting.”

That niche has proven to be a growing one, Kulis says. “Like everything else over the past couple of years, it is still

extremely competitive. There is no free lunch out there. We have found that we’ve been able to, from a niche perspective, gain customers who appreciate our service and the products we can manufacture.”

“While many of Garvey’s customers are in the corrugated manufacturing business, some are graphic design agencies, while still others are what Kulis calls “hybrids between people doing the design and procuring and implementing the signage programs in stores.”

The large-format presses “require big investments,”

“It’s a matter of knowing the media and the inks.”



▲ Pressroom at The Garvey Group, Niles, Ill., which installed its first large-format press nearly six years ago. Chief Operating Officer Joe Kulis explains that the company invested in new equipment with improved technologies after identifying large-format as an area with future growth opportunities that was under-served by competitors with “a lot of older equipment.”

Kulis confides, “and at the time it was our first foray into large-format printing.” Nor was it simply a matter of buying a press. Garvey also had to upgrade its prepress and finishing equipment and expand its physical plant. The cost? “We invested about \$28 million over a three-year period to get us into the business.”

Within the large-format segment, Kulis explains, “a lot of what we do—where our customers really count on us and where we like to be with our customers—tends to be short-run, multi-color work with various types of UV coating or other specialty coating combinations. For example, a migrating dull varnish with a UV coating gives a high contrast, eye-catching appearance to the piece. We like to work on specialty products that require a little bit more on the technique side.

Giving a little bit more is part of everyday life for printers. “Everyone in the printing industry wants everything turned around immediately,” says Kulis. “The special demands of our customers range from managing color over multiple press runs to providing help in engineering the integration of graphics with display construction.”

In Process

What is different, Kulis continues, is the fact that “when our printed sheets leave our dock, they are not finished product yet. It’s usually going to our customers, and our customers are continuing the manufacturing process. Whereas a commercial printer might be shipping finished product out their door, we have requirements that the product meet certain additional standards and specifications—for example, how the product is packaged, the moisture content of the paper—because it’s going into yet another manufacturing facility. The product itself has to meet more technical demands than just pleasing color on a white piece of paper.”

When it comes to working on non-paper substrates, Kulis points out, having conventional and UV manufacturing capabilities requires “a lot more up-front conversation with our internal people to plan out the jobs, and with our customer to understand their expectations. The big thing is really getting the specification nailed down as soon as possible in the production workflow so that everyone understands what needs to happen and what the outcome needs to be. As much as possible it needs to be planned and set out before you get to the press, so you’re not trying

to make last-minute decisions.”

Beyond all of this, Kulis adds, deadlines are tighter “because we’re coordinating a supply chain handoff.” The company’s best strategic move in the large-format arena has been, “as crazy as it sounds, making sure we had a wide enough variety of equipment to handle the different sizes over 40 inch,” says Kulis. “We have 56-inch, 64-inch, and, as of this year, two 81-inch presses. Having that variety of equipment allows us to service—economically—a wide variety of customer requirements.”

Key Moment

Should printers go offset or digital for large format work?

“It depends,” Prince suggests. “As usual, it depends on one thing: money. What is your length of run? Quite frankly, if I were a \$30-million-a-year printer today looking at this very hard, and I had clients who wanted to buy large format, I would go both ways. I would go inkjet roll to roll for the short runs and litho for all the long runs.”

Digital screen printers, says Lyra’s Florek, “mark a key moment in the wide-format market.” The machines, which cost more than \$1 million, use vacuum tables and other mechanisms to move substrates through fixed page-width print head arrays. Inca—a subsidiary of Screen, HP, EFI, and Agfa have released new digital screen printers in the last year. Other manufacturers, including Océ and Xerox,

have ink technology that could be leveraged for fixed head technology.

“Digital devices still pale in comparison to analog devices in terms of output,” says Florek. “This is only the first generation of these devices,

however, and the capabilities of inkjet wide-format devices will likely be enhanced. Hence, output is likely to shift to digital devices at a steady, albeit gradual, rate.”

Some vendors are also using services to supplement their hardware and ink business. HP, for example, “is planning to use a version of its managed print services for customers of its CAD printers,” notes Florek. In addition, technical support and training “are crucial if customers decide to invest in big-ticket superwide printers.”

Hardware and ink prices are in decline. “Partly,” says Florek, “this is the result of heightened competition as vendors enter the market. It is also the result of expanded production that has cut costs to develop and manufacture printers and supplies.” New 54-inch and 64-inch solvent printers can now be priced as low as \$15,000 to \$20,000;

“There is no free lunch out there.”

UV-curable printers currently are priced as low as \$50,000, “but prices are trending downward.”

One “potential threat” to wide-format print, Lyra researchers believe, is the emergence of digital signage. It is used in both indoor and outdoor environments. “Billboard operators like CBS, Clear Channel Outdoor, and Lamar have been investing in electronic billboards at a rapid pace. Digital signage is especially efficient for advertisements of limited duration, which are particularly preferred in times of economic distress.”

Digital signage is also used for high-traffic areas such as airports and shopping centers, which once used backlit graphics. “At this time, however,” Florek says, “we think digital signage merely supplements print signage. Digital signage will divert demand at any rate.”

A printer purchasing a large-format press will find that his best return on investment is going to be in the plastics field, Prince suggests, “or in folding cartons. Both are hot right now, and if I’m going to put it on plastic I’m going to have a UV press.”

Project prices have been “basically stable as long as you’re doing good quality work,” Prince says. “Now, in the regular inkjet segment those prices have come down as a result of price pressure because everyone is getting into the market, and so many people are in it already.” Where the real battles are taking place, he adds, “are in the two- and three-color work, where it’s just basic signage. When you get into the high-quality work, the pricing model becomes much more interesting.”

Tagging Defects

The ROI on a large-format press “comes down to efficiencies, reduction in total makereadies and makeready times, one-pass printing, in-line quality control systems and moving stock effectively in and out of the press,” Chmura explains.

One recent innovation, which comes from KBA, is the module-based QualiTronic system, whose capability removes the manual labor aspect on press. The in-line sheet-inspection and density control system scans each sheet and compares it with a reference sheet. The system is located in the delivery on a straight press; when a customer purchases a long perfecter, there are two QualiTronic systems installed on the press, one before the perfecter mechanism and the second in the delivery.

The system maintains color during the production run, monitoring the lithographic performance of the press, including mis-register, debris in the image area, and damper system dry ups. When the system detects a defect from the customer color OK, it will insert a tag into the load and alert the press operator that there is a printing issue that needs to be addressed. When the press operator makes the correction, the system will insert another tag into the load, and the software will inform the finishing department that printing defects exist between the two tags so it can remove the bad copies.

Gain a Foothold

Printers “want to diversify,” Chmura points out. “They want to get out of the commodity market, and get into other areas, such as the packaging market, which is the largest-growing market in the United States. The com-

mercial market is in transition, people are trying to find better ways to run their work to satisfy their customer base.” Those who have purchased KBA’s Rapida 81-inch machines in the United States, for example, use the

presses for a wide range of applications, including everything from general commercial work to packaging to POP/display work, he says.

More printers will continue to try and gain a foothold in the packaging and plastics markets, Chmura predicts. “Many printers are going to print with UV. Everything today for the printer is on demand. The print buyer today expects to send a file to the printer’s customer service representative and have the printer deliver the job within 24 to 48 hours.

In addition, “The average print buyer has budget restrictions, as well as cycling promotions that require a quick and easy fix for their printing needs,” he continues. “The print buyers expect this type of on-demand service to stay competitive in their individual marketplace.”

The outlook for the next year or two in large-format is “tough,” says Prince. “It’s tough for everybody. It’s a tough market.” Growth can be had, however, particularly “if you are in large format carton or large format plastic.”

In the end, says Chmura, “you need to look at where your market is going; who are your competitors, what are your manufacturing opportunities, and how can your organization differentiate itself in today’s competitive marketplace?” ♦

“The quality level can be extraordinary.”