



Next Generation Inkjet Investment

Survey-based analysis of how evolving customer demands, shifting application trends, and reinvestment strategies are driving the next phase of inkjet adoption.

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INTRODUCTION

Production inkjet press adoption is entering a new phase, with early adopters investing in next-generation equipment and more print providers making their first production inkjet purchase. Both experienced and new users are attracted to the technology because of its high speeds, exceptional output quality, broad substrate compatibility — including both coated and uncoated papers — and advanced variable data capabilities that support personalized, data-driven printing.

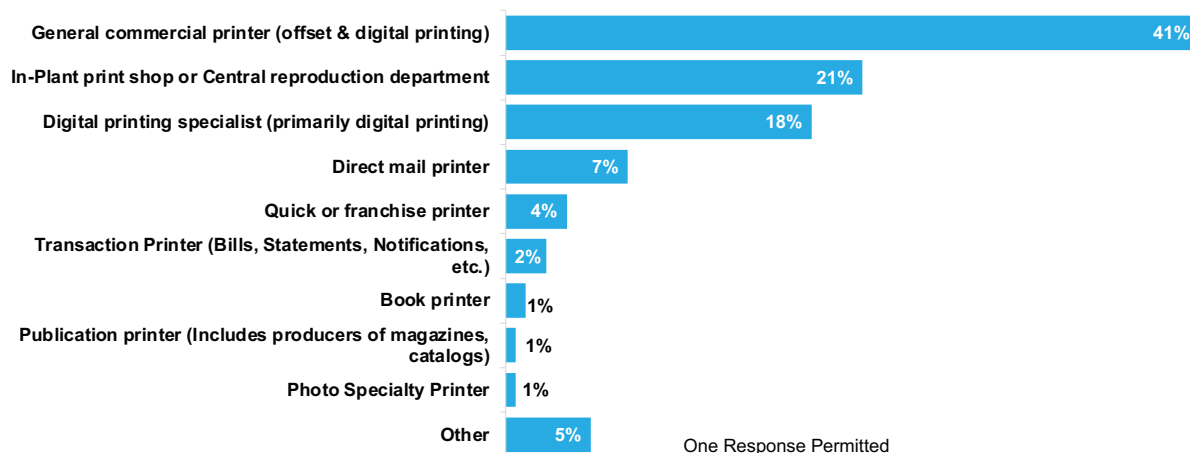
To gain deeper insight into the evolving production inkjet landscape, NAPCO Research (a division of NAPCO Media LLC, publisher of *Printing Impressions* and *In-Plant Impressions*) conducted a comprehensive study. The research aimed to track investment trends, evaluate the migration of print work to inkjet, and identify the key drivers and barriers to adoption, as well as the customer demands shaping the market.

The research is based on two separate online surveys targeting both print service providers and organizations that purchase print. The findings in this report are based on the following responses:

- 167 print providers (see *Figure 1* for provider type breakdown), including 61 inkjet adopters (53 print-for-pay and 8 in-plant operations)
- 167 communication buyers and influencers involved in specifying or purchasing print

Figure 1: Print Provider Respondent Base

Q. Which category best describes your company's PRIMARY business?



n=167 Print Providers

Source: Next Generation Inkjet Investment, NAPCO Research 2025

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Overall, survey respondents with production inkjet report using the equipment for 5.7 years, on average, with print-for-pay providers using inkjet for 5.9 years and in-plants 4.9 years.

KEY FINDINGS

Inkjet Delivering Significant Benefits

- Survey respondents reported that production inkjet delivered notable efficiency and profitability gains, including an average 10% decrease in production waste, a 9.4% increase in profits, and a one-person decrease in press staffing needs.
- Print providers reported a range of strategic business benefits from their investment in production inkjet. Sixty-five percent said it led to improved overall profitability, while 62% reported it helped generate new business. Over half (54%) noted an enhanced ability to offer personalization and variable data printing (VDP), aligning with growing market demand for customized communication. Other benefits included reduced per-job costs (50%), lower labor expenses (37%), and the ability to consolidate multiple pieces of equipment using a single inkjet press (33%) — further supporting inkjet's role as a smart, scalable investment for growth.

Adoption & Migration Trends

- Inkjet volume is increasing. Respondents expect significant migration from traditional print processes to inkjet. Sheetfed inkjet volume is projected to grow by 25%, while offset is expected to decline by 9%.
- Top sources of print volume migrating to inkjet include sheetfed offset (49%), toner devices (49%), and new applications enabled by inkjet (46%).
- On average, respondents report moving 42.3% of sheetfed offset, 39.3% of web offset, and 34.8% of toner work to inkjet.
- Over half (52%) of respondents with inkjet capabilities operate sheetfed inkjet presses, indicating the platform's growing adoption and versatility.

Investment Drivers & Future Plans

- Top motivations for inkjet investment include a shift from offset to inkjet; lower cost of ownership versus toner; short-run demand; increased productivity; offset-like quality.
- 59% of current users plan to upgrade existing inkjet equipment.
- 39% plan to invest in new presses within the next 24 months.
- Survey respondents are focusing their future production inkjet investments on compact and mid-format devices. Sheetfed B2 presses and webfed presses up to 22" are the most popular choices, each cited by 43% of respondents. A3/SRA3 sheetfed and 30"– 42" webfed presses also show solid interest, with 22% planning to invest in these formats. As for larger formats, 9% expect to invest in B1 inkjet presses and 4% in webfed devices wider than 42".
- When evaluating production inkjet presses, more than half of respondents rated several key factors as extremely important to their decision-making process. Press uptime topped the list at 71%, highlighting the importance of reliability in maintaining consistent production. This was followed by print quality (68%), customer support (67%), cost to operate and maintain (62%), overall running costs (58%), and speed and productivity (52%).

Profitability of Inkjet Applications

- Inkjet is producing a wide range of work — profitably — across both premium and high-volume print categories.
- Respondents report applications delivering the highest profitability include photo specialty products, which deliver an average profit margin of 15%, followed by financial/legal materials at 12.5%, and signage and display materials at 11.6%. These applications often demand high quality, customization, and fast turnaround — areas where inkjet technology excels.
- Production inkjet is also delivering solid returns on high-volume applications. Providers report healthy profit margins for books (11.1%), postcards (10.8%), direct mail (10.1%), and labels and packaging (10.4%).

Barriers to Inkjet Adoption

- Among respondents who have not adopted production inkjet, 37% indicated that the technology does not meet their specific production requirements.
- 35% of non-users cited adoption cost as a significant obstacle to investing in production inkjet. For many, the initial capital expense, along with associated costs for implementation, training, and integration, continues to be a deterrent despite inkjet's long-term cost-saving potential.

Press Selection Criteria: What Matters Most

More than half of respondents rated the following as extremely important when evaluating a production inkjet press:

- Press uptime (71%)
- Print quality (68%)
- Customer support (67%)
- Cost to operate and maintain (62%)
- Overall running costs (58%)
- Speed/productivity (52%)

Inkjet Gaining Customer Traction

- Buyers are drawn to inkjet's ability to deliver fast turnaround times, support shorter runs, enable personalization and versioning, and offer high-quality color output.
- 91% of respondents said they prefer working with print providers that offer digital printing, and 70% specifically prefer providers with production inkjet capabilities.
- A majority (61%) reported being extremely familiar with the printing processes used to produce their organization's materials. Additionally, 70% said they actively specify inkjet for their print projects, underscoring growing confidence in the technology.

Personalization Attractive to Customers

- Personalization is a key strategy for driving engagement — and inkjet makes it possible.
- With postal rates rising, respondents said they've increased their use of personalization in printed materials to enhance impact and improve ROI. Production inkjet enables this by supporting highly targeted, data-driven printing.
- Buyers are using personalization and seeing measurable success.
- Despite the benefits, personalization presents implementation challenges. Respondents cited cost and budget limitations, difficulty measuring effectiveness, and data-related issues as top obstacles.

Criteria for Selecting Print Providers

- When selecting a print provider, buyers prioritize technology, reputation, and flexibility.
- Expanded services and sustainability also influence provider choice.
- Buyers identified internal marketing departments and creative directors as the leading decision-makers when it comes to print applications, finishing options, and special effects. Print providers and graphic design firms were also named as key influencers.

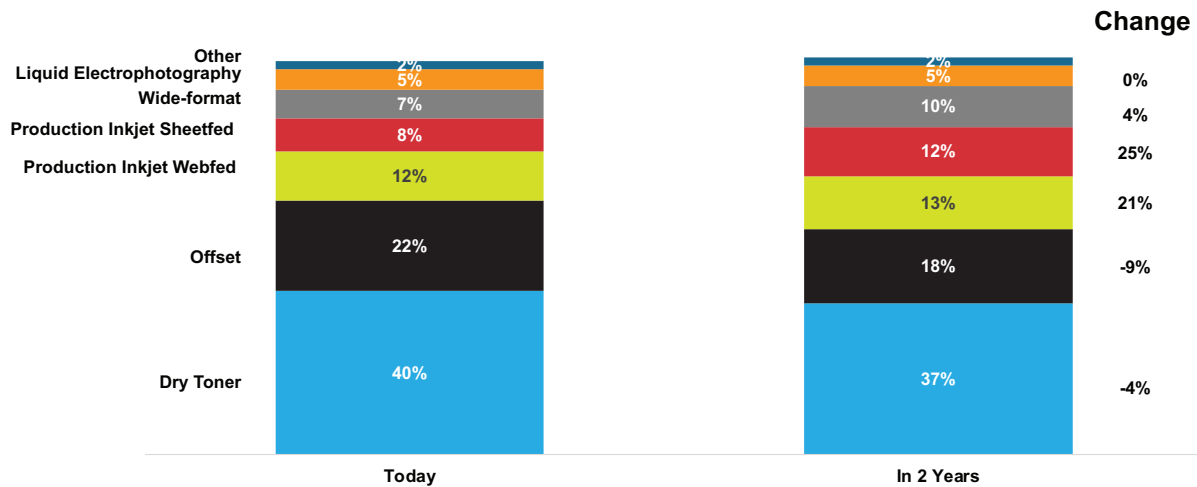
WORK PRINTED VIA INKJET INCREASING

Survey respondents anticipate a continued migration of print work from traditional processes to inkjet. The study asked participants to report both the current and projected distribution of their print work across major technologies, including dry toner, offset, sheetfed and webfed inkjet, wide-format, and liquid electrophotography (LEP).

Respondents reported that the most widely used process in their operations is dry toner digital printing, accounting for 40% of current output, followed by offset at 22% (*Figure 2*). Over the next two years, respondents expect the largest increase in work volume to occur on sheetfed inkjet presses (+25%), while offset is expected to see the greatest decline (-9%). Dry toner is also projected to decrease slightly (-4%).

Figure 2: Print Work by Printing Press Type

Q. What percentage of your organization's print work is printed/do you expect will be printed on the following presses TODAY/in TWO years ago?



n=167 Print Providers

Source: Next Generation Inkjet Investment, NAPCO Research 2025

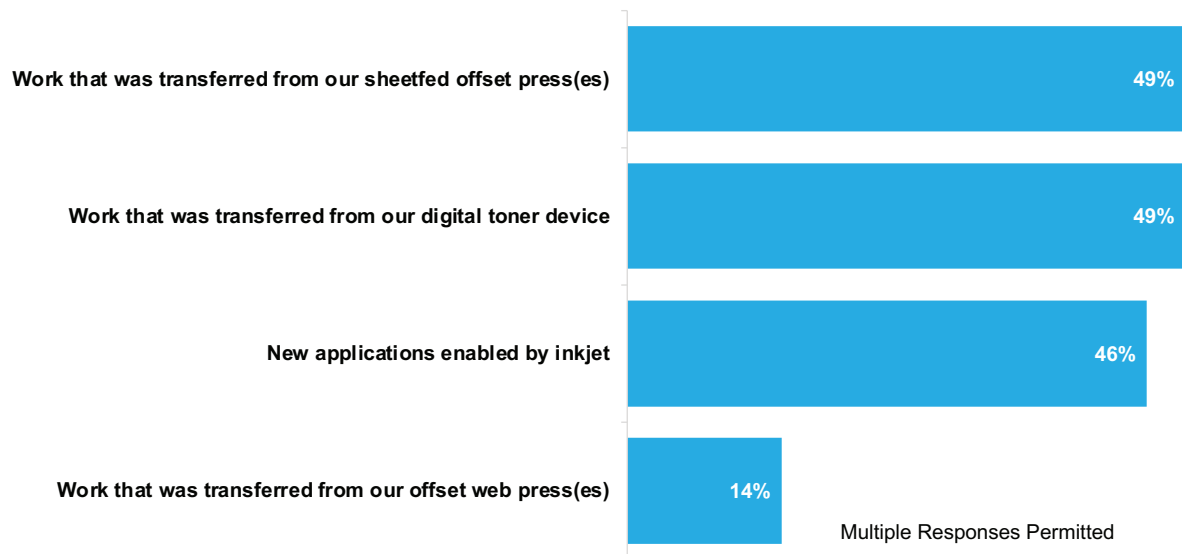
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The projected migration underscores growing confidence in inkjet's ability to deliver both quality and efficiency, especially for applications once dominated by offset or dry toner. This aligns with broader industry trends favoring automation, personalization, and substrate versatility.

While Figure 2 highlights how the overall print volume is expected to shift toward inkjet over the next two years, *Figure 3* provides a closer look at where that work is coming from. Respondents identified the primary sources of print volume migrating to inkjet, with nearly half citing sheetfed offset presses (49%) and toner devices (49%) as key contributors. Additionally, 46% of respondents reported that entirely new applications — made possible by inkjet's unique capabilities — are also driving increased inkjet output.

Figure 3: Sources of Inkjet Volume

Q. What are the primary sources of volume for your work printed on inkjet presses?



n=59 Print Providers with Production Inkjet Press(es)
Source: Next Generation Inkjet Investment, NAPCO Research 2025



When respondents were asked to quantify the share of work they've already transitioned to inkjet, they reported significant conversion across multiple technologies. On average, 42.3% of sheetfed offset work has been shifted to inkjet, along with 39.3% of web offset and 34.8% of digital toner work. These figures highlight the growing role of inkjet not just as a complement to existing processes, but as a primary production platform replacing legacy technologies across a broad range of applications.

INKJET INVESTMENT TRENDS

Table 1 shows survey respondents' production inkjet printing capabilities by respondent type. The most commonly used production inkjet presses are sheetfed. More than half of respondents with production inkjet capabilities operate sheetfed inkjet presses. Overall, respondents report a higher incidence of operating sheetfed inkjet presses compared to webfed.

Table 1: Production Inkjet Capabilities

INKJET CAPABILITIES	ALL	PRINT-FOR-PAY	IN-PLANT	RESPONDENTS WITH INKJET
Operate sheetfed production inkjet press/presses	23%	24%	35%	52%
Operate webfed production inkjet press/presses	7%	8%	13%	16%
Operate both sheetfed and webfed production inkjet press/presses	14%	17%	5%	32%
Do NOT operate production inkjet press but plan to invest	24%	26%	20%	NA
Do NOT operate production inkjet press and no plans to add	32%	25%	27%	NA
Number of Respondents	167	132	60	62

Next Generation Inkjet Investment, NAPCO Research 2025

The high percentage of print providers that operate inkjet presses reflects the technological advancements that have made it an attractive, versatile, highly productive, and more accessible technology. In addition, while the first high-speed production inkjet presses were webfed systems, the introduction of sheetfed inkjet presses has expanded opportunities for print providers by offering affordability, high-quality color printing, attractive running costs, smaller footprints, substrate flexibility, and enhanced productivity.

Press Purchasing Criteria

When evaluating production inkjet presses, survey respondents place a strong emphasis on performance, reliability, and total cost of ownership. As shown in *Figure 4*, more than half of survey respondents who currently use or plan to invest in production inkjet presses rated several performance and support factors as extremely important.

The survey revealed that press uptime is the top priority, with 71% of respondents rating it as extremely important. This highlights the need for consistent, uninterrupted production — especially in high-volume environments where downtime can significantly impact profitability.

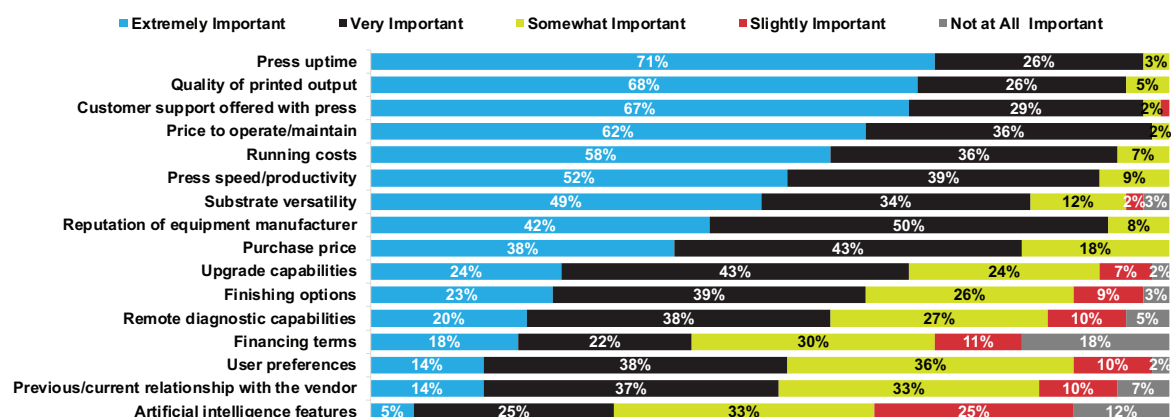
Print quality also ranked highly, cited by 68% of respondents, reflecting the importance of meeting customer expectations for sharp, vibrant, and accurate output. Close behind was customer support, with 67% of print providers emphasizing the value of strong post-sale service and vendor responsiveness — critical factors in maintaining press performance.

Cost-related factors remain central to purchasing decisions. Sixty-two percent of respondents rated the cost to operate and maintain the press as extremely important, while 58% pointed to overall running costs as a key consideration. Additionally, 52% noted speed and productivity as essential, underscoring the value of fast throughput in meeting tight turnaround times and maximizing efficiency.

Together, these findings highlight the key attributes print providers look for when selecting production inkjet equipment — reliability, quality, support, and cost-effectiveness — all of which are essential to achieving a strong return on investment.

Figure 4: Production Inkjet Press Selection Criteria

Q. How important are the following in your production inkjet press selection process?



n=92 Print Providers that have or plan to add production inkjet
Source: Next Generation Inkjet Investment, NAPCO Research 2025

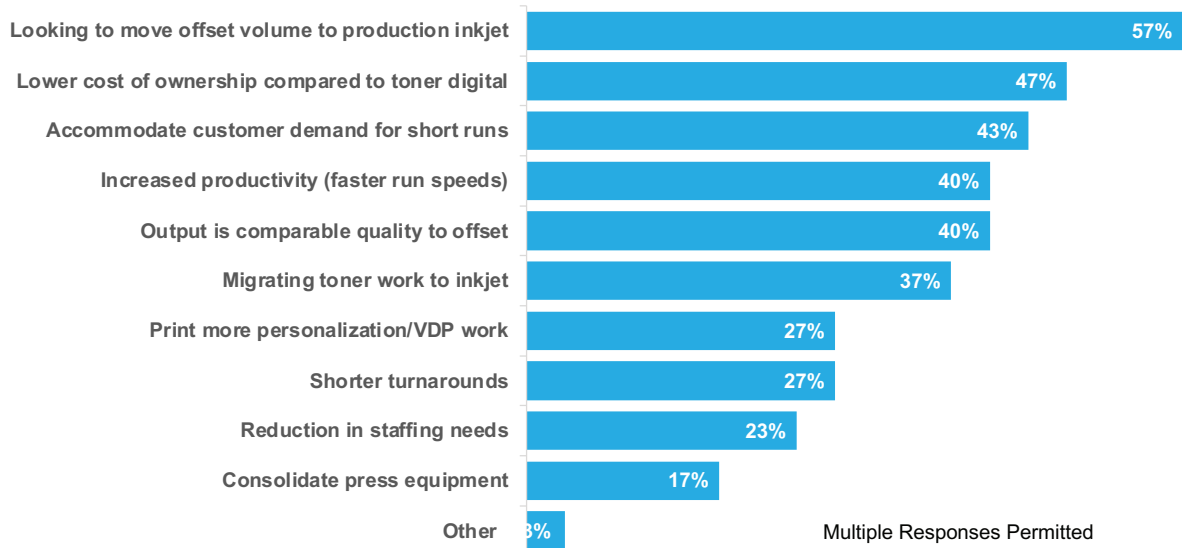
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Reasons for Considering Investing in Inkjet

As shown in *Figure 5*, respondents planning to invest in production inkjet presses cited a range of strategic and operational drivers behind their decision. The leading reason, selected by 57%, is the desire to shift offset volume to inkjet, reflecting a broader industry trend toward more flexible, digital production. Nearly half (47%) of respondents pointed to a lower cost of ownership compared to toner-based digital devices, while 43% are looking to better accommodate customer demand for short-run jobs. Other top motivations include increased productivity through faster run speeds (40%) and output quality that rivals offset (40%). Additionally, respondents plan to use inkjet to migrate toner work (37%), expand personalized and variable data printing (27%), and meet demands for shorter turnaround times (27%). Operational efficiencies such as reduced staffing needs (23%) and press consolidation (17%) round out the list, highlighting inkjet's appeal as both a growth enabler and a cost-control solution.

Figure 5: Reasons for Considering Production Inkjet Investment

Q. Why is your company planning to invest in production inkjet devices?



n=30 Print Providers that Plan to Add Production Inkjet Presses
Source: Next Generation Inkjet Investment, NAPCO Research 2025

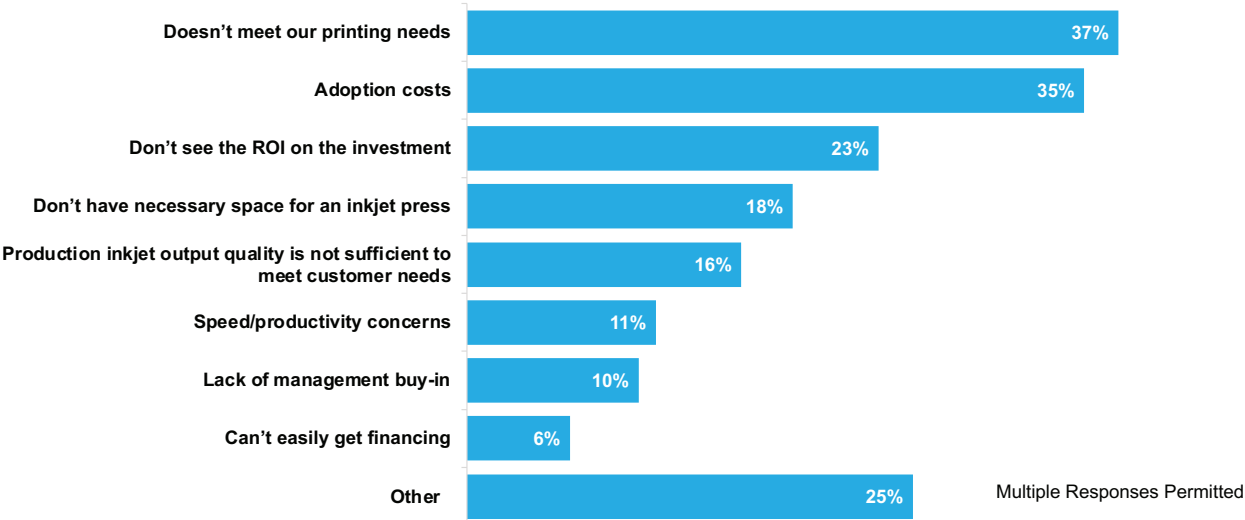


Barriers to Inkjet Adoption

Respondents who have not yet adopted production inkjet (Figure 6) report that the top barriers include inkjet doesn't meet their specific printing need and cost. These responses suggest that while the technology has advanced, perceptions around cost and application fit continue to shape adoption decisions.

Figure 6: Reasons for Not Investing in Production Inkjet

Q. Why haven't you invested in production inkjet devices?



n=103 Print Providers that Don't Operate Inkjet Press(es)
Source: Next Generation Inkjet Investment, NAPCO Research 2025



INKJET DELIVERING SIGNIFICANT BENEFITS

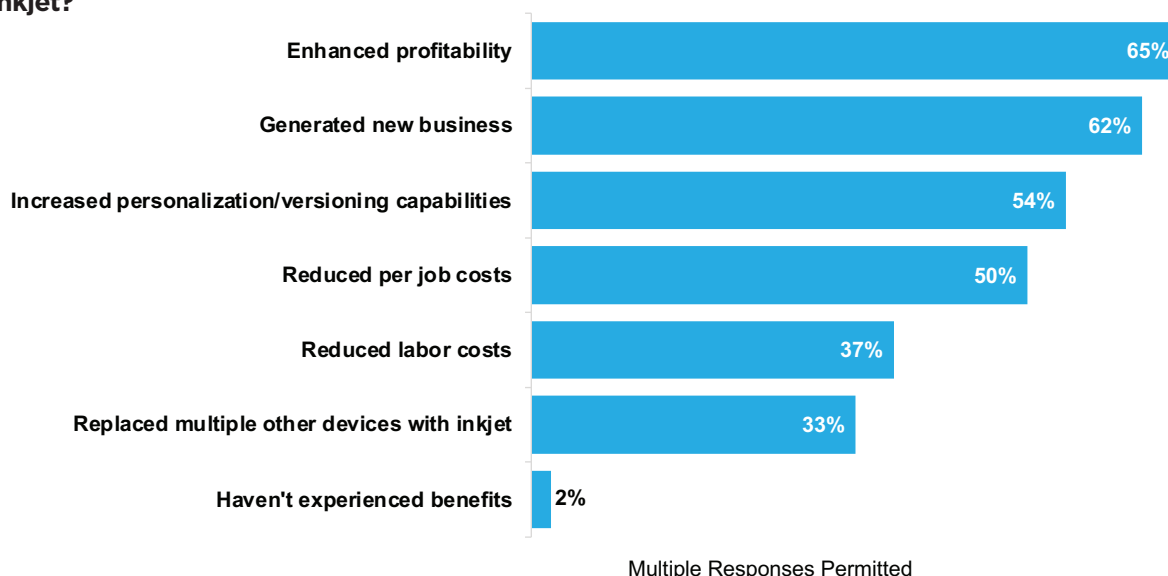
Production inkjet presses are delivering significant advantages to respondents' operations. On average, respondents that operate production inkjet presses indicate their investment in production inkjet yielded the following benefits:

- 10% decrease in production waste
- 9.4% increase in profits
- 1 person decrease in press operating staff

Beyond benefits in waste reduction, staffing efficiency, and profitability, respondents also reported a range of broader business advantages from adopting production inkjet — many of which are illustrated in *Figure 7*. For 65%, the technology enhanced overall profitability, while 62% said it helped generate new business opportunities. Over half (54%) credited inkjet with increasing their ability to offer personalized and versioned print, aligning with growing customer demand for targeted communications. Other advantages included lower per-job costs (50%), reduced labor expenses (37%), and, for a third of respondents (33%), the ability to consolidate multiple devices by replacing them with a single inkjet press. These results underscore inkjet's role not just as a production tool, but as a strategic asset driving operational and business growth.

Figure 7: Production Inkjet Benefits

Q. What benefits, if any, has your organization experienced as a result of adding production inkjet?



n=52 Print Providers with Production Inkjet Press(es)
Source: Next Generation Inkjet Investment, NAPCO Research 2025

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Print providers with inkjet presses shared the following responses to an open-ended survey question on how the technology has impacted their organization's productivity and/or profitability:

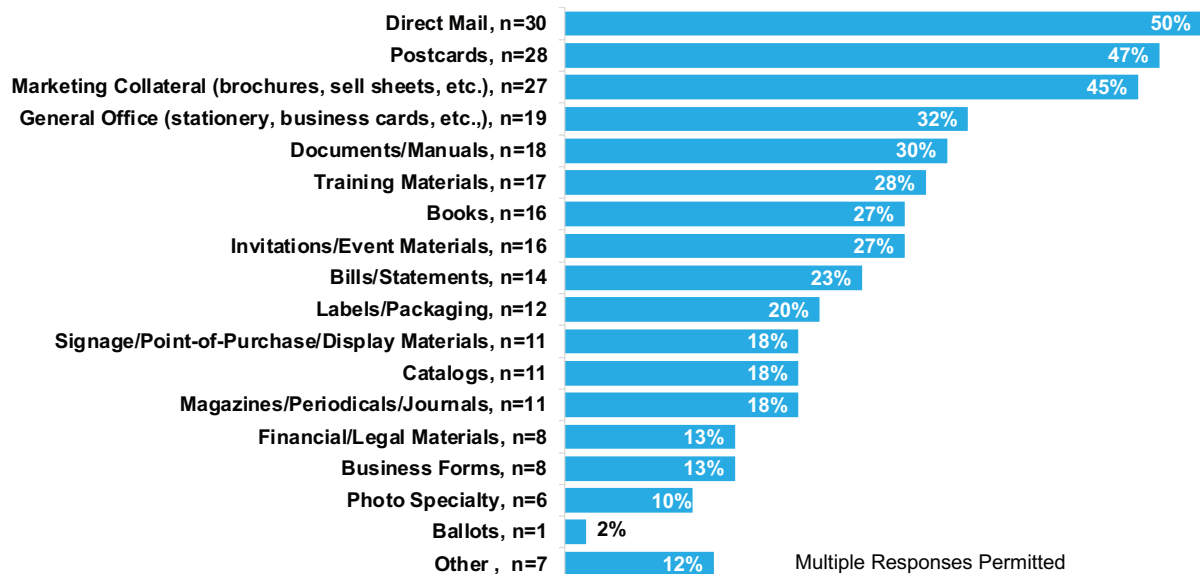
- "Faster throughput. Improved efficiency. Reduction in processes and handling."
- "Improved profitability."
- "We lowered our waste and are working better, faster, and smarter."
- "Quicker turnaround for rush jobs. Flexibility in the book sizes that can be printed."
- "Less waste, quicker turnaround."
- "Fewer people required to do the same work."

- “Eliminated inkjetting or imprinting of shells.”
- “It has nearly eliminated our offset production presses. They will be phased out in 2025.”
- “Increased uptime and overall production speed have allowed us to take in more work. The cost per page has come down, allowing us to charge less and win more bids.”
- “Quicker turnaround times, less make-ready, and repeatable color.”
- “Lower cost of operation due to speed, reduced waste, and lower cost of parts.”

Applications Moving to Inkjet and Delivering Profit

Survey respondents report that production inkjet presses are being used to print a wide variety of jobs. While early use focused on transactional documents, direct mail, and books, *Figure 8* highlights how inkjet has since evolved to accommodate a much broader set of applications. The expanding range of print applications migrating to inkjet underscores the technology’s growing value across the industry.

Figure 8: Applications Printed Via Production Inkjet
Q. Of the applications your organization prints, which ones are printed on production inkjet presses?



n=60 Print Providers with Production Inkjet Presses
 Source: Next Generation Inkjet Investment, NAPCO Research 2025

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In addition to expanding the range of applications produced, respondents provided insights into the average profit margins generated by these jobs — highlighting inkjet’s strong potential to drive revenue across both high-value and high-volume categories. As shown in *Table 2*, photo specialty products reported the highest average margin at 15%, followed by financial/legal materials (12.5%) and signage and display materials (11.6%). Other profitable applications include books (11.1%), postcards (10.8%), and event materials (10.6%). Even high-volume work like direct mail (10.1%) and labels/packaging (10.4%) delivered solid margins. While more commoditized products such as training materials (7.2%) and manuals (7.8%) showed lower returns compared to other applications, the overall range reinforces inkjet’s ability to profitably support a diverse set of print applications.

Table 2: Profit Margins on Inkjet Printed Applications

Q. What is the average profit margin for the applications your organization prints on production inkjet presses?

APPLICATION	PROFIT MARGIN
Photo Specialty, n=6	15.0%
Financial/Legal Materials, n=8	12.5%
Signage/Point-of-Purchase/Display Materials, n=11	11.6%
Books, n=16	11.1%
Postcards, n=28	10.8%
Invitations/Event Materials, n=16	10.6%
Labels/Packaging, n=12	10.4%
Direct Mail, n=30	10.1%
General Office (stationery, business cards, etc.), n=19	10.0%
Catalogs, n=11	9.5%
Magazines/Periodicals/Journals, n=11	9.5%
Marketing Collateral (brochures, sell sheets, etc.), n=27	8.8%
Business Forms, n=8	8.8%
Bills/Statements, n=14	8.6%
Documents/Manuals, n=18	7.8%
Training Materials, n=17	7.2%

Source: Next Generation Inkjet Investment, NAPCO Research 2025

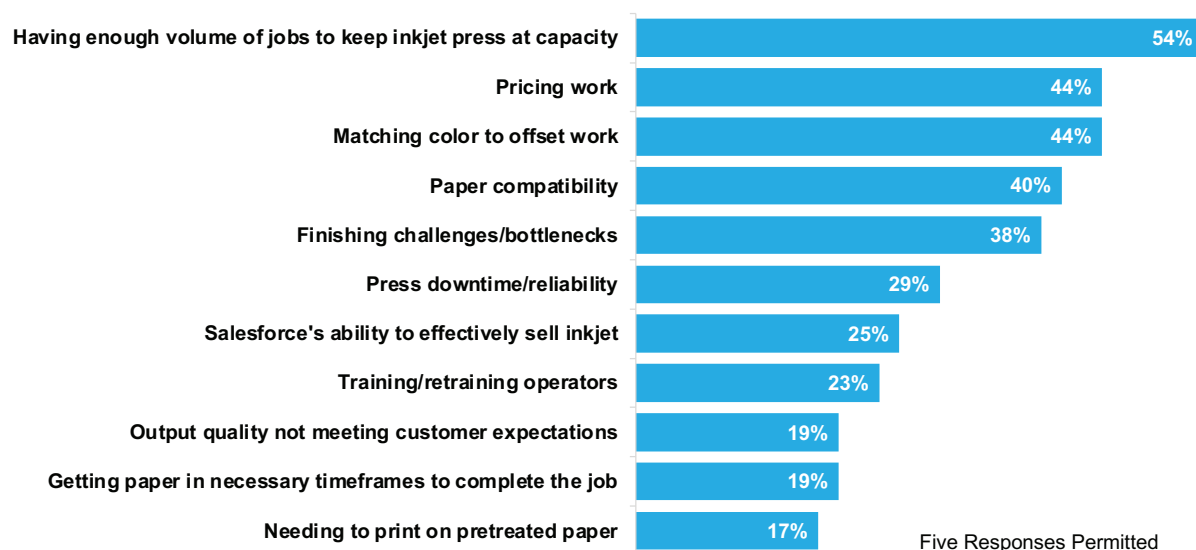
CHALLENGES WITH INKJET IMPLEMENTATION

Despite the many benefits reported by respondents, several challenges remain that can impact the full realization of inkjet's potential. As shown in *Figure 9*, chief among them is maintaining sufficient volume to keep the press running at capacity, noted by 54% of respondents. This volume concern directly influences return on investment and overall operational efficiency.

Pricing work appropriately was also a concern for 44% of print providers, tied with the challenge of matching inkjet color output to offset print standards — an issue especially relevant for companies with mixed press environments or demanding brand clients. Paper compatibility was cited by 40% of respondents, highlighting the ongoing need to test and qualify substrates suitable for inkjet processes.

Figure 9: Top Inkjet Challenges

Q. What are your top FIVE challenges when printing work on production inkjet presses?



n=52 Print Providers with Production Inkjet Press(es)
Source: Next Generation Inkjet Investment, NAPCO Research 2025

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Finishing and post-press bottlenecks emerged as another barrier, with 38% reporting challenges in this area. Press downtime and reliability were flagged by 29%, reflecting the need for continued advancements in service and support. Internally, print providers are also dealing with organizational readiness: 25% pointed to sales teams' difficulty in effectively selling inkjet, while 23% highlighted challenges in training or retraining operators.

A smaller but notable number of respondents reported concerns with meeting customer expectations for output quality (19%), securing paper within required timeframes (19%), and needing to print on pretreated paper (17%), each of which can limit flexibility or add complexity to the production workflow.

NEXT GENERATION INKJET PRESS INVESTMENT TRENDS

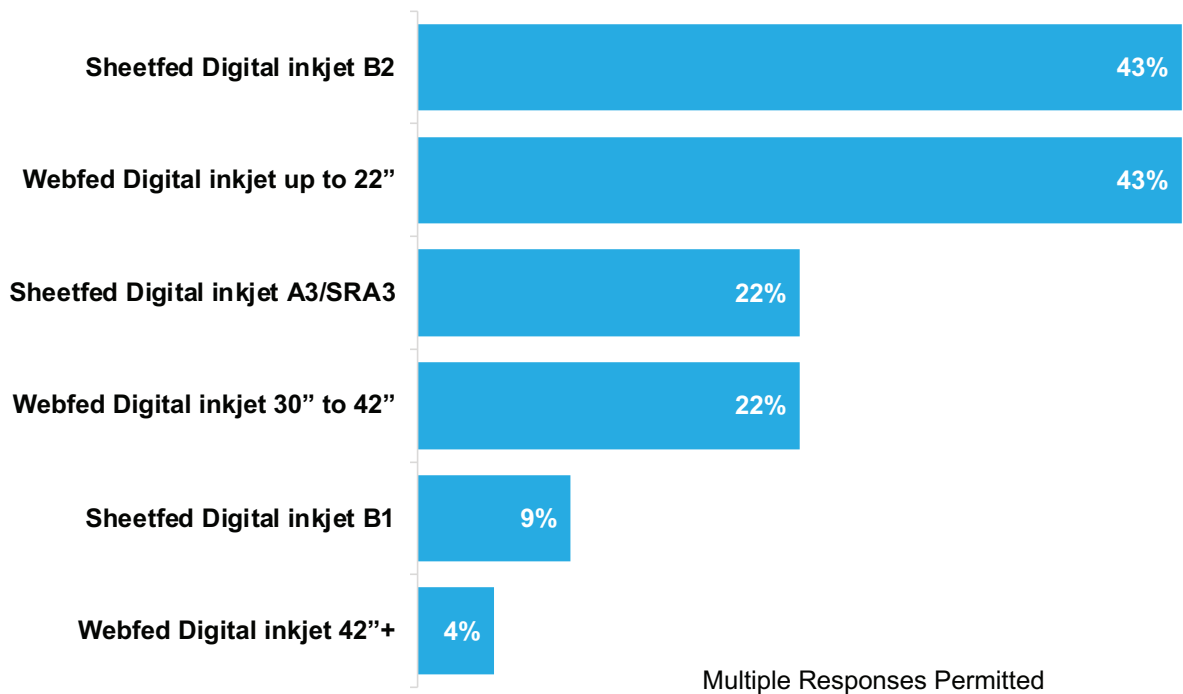
Survey results point to a new chapter in inkjet adoption. Fifty-nine percent of current users plan to upgrade or update existing presses, while 39% of all respondents expect to invest in new equipment within the next 24 months. This signals a shift from early adoption to long-term integration and optimization — marking the next phase of production inkjet’s evolution.

Inkjet Investment Plans

Survey respondents shared their investment plans for production inkjet over the next two years, as illustrated in *Figure 10*. The bar chart shows that sheetfed B2 and webfed presses up to 22” are the top areas of focus, with 43% of respondents planning to invest in each. A3/SRA3 sheetfed and 30” to 42” webfed presses were cited by 22% of respondents. Interest in sheetfed B1 (9%) and webfed presses over 42” (4%), is more limited.

Figure 10: Inkjet Investment Plans

Q. Are you planning to invest in any of the following printing presses within the next 2 years?



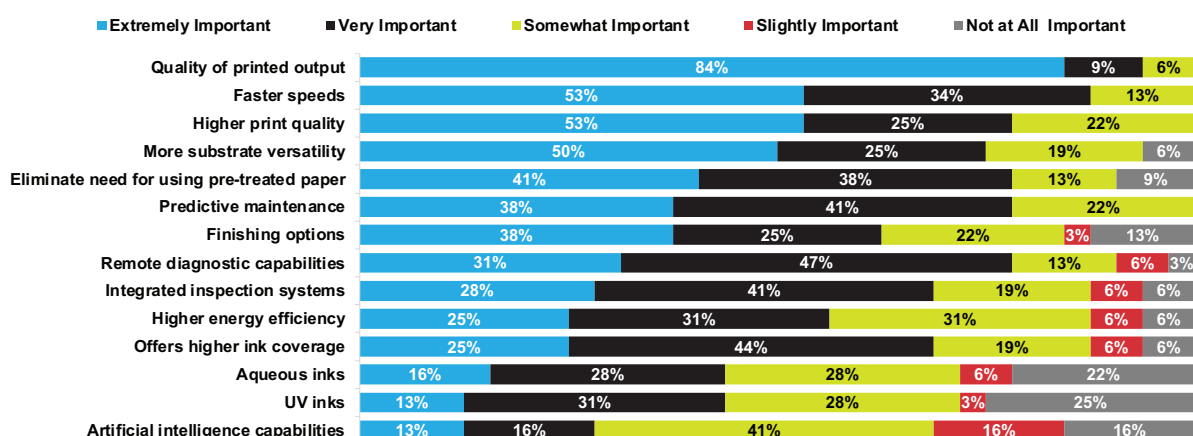
n=23 Print Providers Planning to Update its Existing Inkjet Presses in the Next 24 Months
Source: Next Generation Inkjet Investment, NAPCO Research 2025

Important Features and Considerations

Respondents planning to update their current inkjet presses were asked to rate the level of importance for various press features in their next investment. As shown in *Figure 11*, 84% of respondents identified print quality as extremely important, while more than half also cited the need for faster speeds, enhanced print quality, and greater substrate versatility as key considerations. Other important considerations include eliminating the need for pre-treated paper, predictive maintenance, finishing options, remote diagnostic capabilities, and integrated inspection systems.

Figure 11: Important Features in Next Inkjet Purchase

Q. Rate the level of importance of each of the following in your next production inkjet investment?



n=32 Print Providers Planning to Update Existing Inkjet Presses
Source: Next Generation Inkjet Investment, NAPCO Research 2025



When asked in an open-ended question what they would do differently in their next production inkjet purchase compared to their last, respondents shared the following insights:

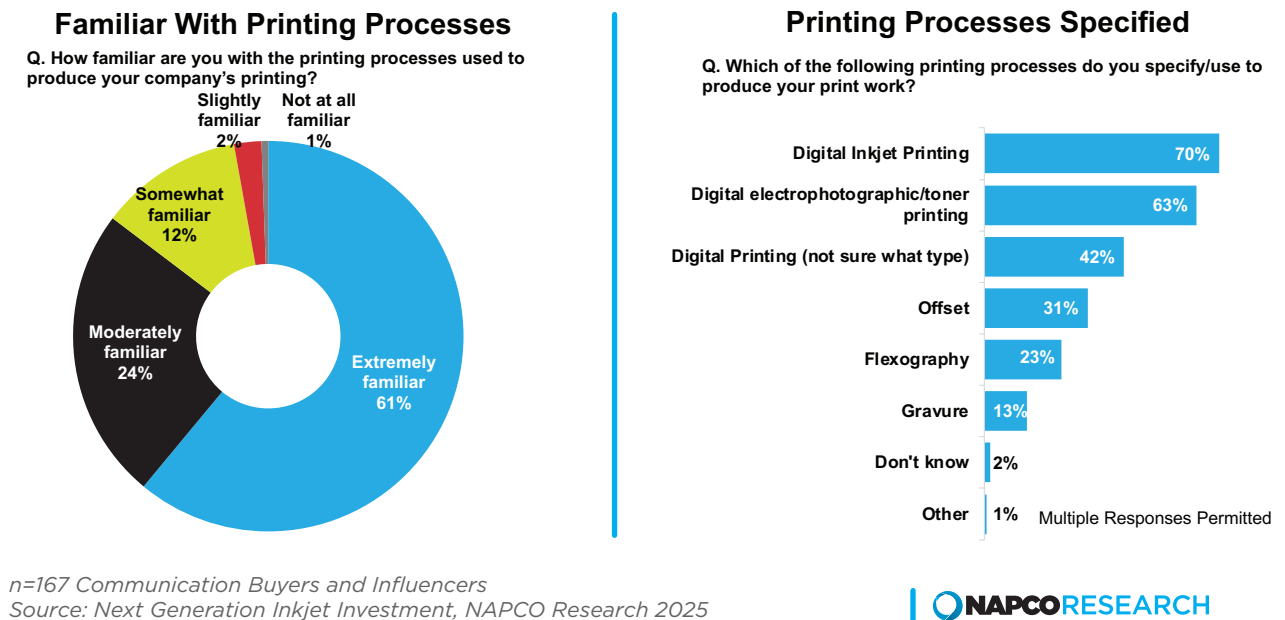
- “Better understand the historical reliability in an environment similar to ours, and the number and experience level of the technicians who provide service.”
- “Ensure that the device(s) have inline finishing capabilities, such as stapling, rather than relying on a third-party booklet maker for single or dual stapling.”
- “Look at the total cost of ownership of the machine.”
- “Integrate finishing capabilities.”
- “Double-check the tech support bench.”
- “Research all consumables — especially ink — to make sure we remain profitable.”

- “Research inline finishing options.”
- “Confirm substrate versatility and compatibility with high-quality output requirements.”
- “Gain a better understanding of uptime and total cost of ownership (consumables, service contracts, cost of parts, etc.).”

PRINT CUSTOMER DEMANDS DRIVING INKJET VOLUME

Production inkjet offers a wide array of benefits for print customers, including enhanced personalization and versioning, expanded color options, shorter print runs, faster turnaround times, and the flexibility to support new and diverse applications. As part of this study, communication buyers were surveyed to assess their familiarity with inkjet and the value it brings to their organizations. The results show strong interest: 91% of respondents prefer working with providers that offer digital printing, and 70% specifically prefer providers with production inkjet capabilities. Additionally, 61% of buyers report being extremely familiar with the printing processes used for their jobs, and 70% say they actively specify inkjet in their print projects (*Figure 12*).

Figure 12: Buyers’ Print Process Familiarity and Specifications



Making Print Stronger with Personalization

Print continues to compete with a wide range of digital media for audience attention. Organizations today have many options for engaging customers, promoting products, and building brand awareness. Rising postal rates have added further pressure, prompting 72% of respondents to increase their use of personalization in printed materials to improve impact and return on investment.

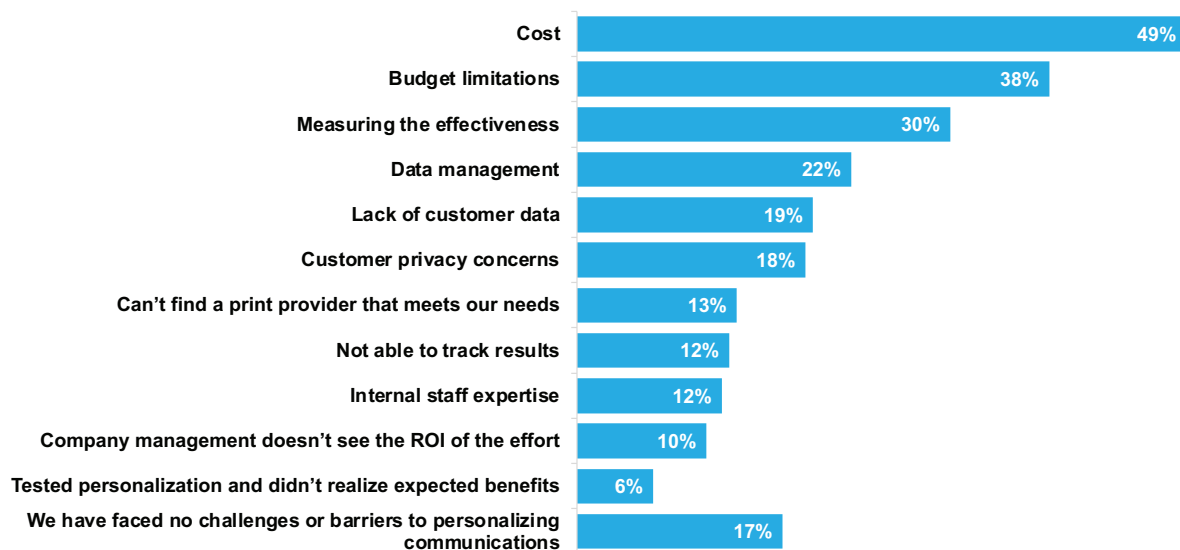
Production inkjet presses give print customers the tools to deliver more relevant, targeted messaging through personalization and versioning. According to respondents, these features are not just available — they're effective.

Eighty-two percent of communication buyers and influencers report using dynamic personalization in their print campaigns, such as tailoring text and images to individual recipients. As a result, they saw response rates increase by 42%. Similarly, 83% reported using versioning — customizing content for groups or segments — which also drove a 42% improvement in response.

However, implementing effective personalization is not without its challenges. As shown in Figure 13, respondents identified key obstacles, including cost and budget limitations, difficulty measuring effectiveness, and data-related issues. These barriers highlight the importance of balancing personalization strategy with available resources, as well as the need for better tools and processes to support successful execution.

Figure 13: Challenges to Customization and Personalization

Q. What are the key challenges or barriers to customizing/personalizing your organization's communications?



n=163 Communication Buyers and Influencers
Source: Next Generation Inkjet Investment, NAPCO Research 2025

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Selecting Print Providers

The survey asked communication buyers and influencers to rate the importance of various factors when selecting a print service provider. The top criteria considered “extremely” or “very important” included:

1. Technical capabilities – 80%
2. Strong industry reputation – 80%
3. Print samples showcasing provider capabilities – 78%
4. Printing capabilities include digital presses – 77%
5. Online ordering tools for brand and print management – 76%
6. Ability to deliver dynamic personalization – 76%
7. Advanced versioning capabilities – 75%
8. Access to services beyond print (design, finishing, mailing, data) – 66%
9. Production inkjet capabilities – 66%
10. Use of sustainable/green printing processes – 64%

When asked in an open-ended question to elaborate on the decision factors that are important to their organization when selecting a print provider, respondents offered the following:

- “The biggest things that matter to us are print quality and print samples. We want to see the quality of their work.”
- “Printing capabilities, turnaround time, price, and quality.”
- “What’s important for my company is that the provider specializes in our industry and has a great reputation.”
- “Decision factors include the provider’s reputation and reliability, as well as the professionalism of the provider’s employees.”
- “We have graphic designers on staff, and I trust their skills and integrity, so I often leave printing decisions to them.”
- “A previous relationship or referral is always welcome, but we tend to focus more on the quality of services and the range of products available to enhance our marketing and advertising.”
- “The most important factor for my company is environmental sustainability. We are working toward becoming a greener company, so that’s a top priority. We also need a print provider that offers a wide range of customization because we are trying to take a more personalized approach to our marketing efforts.”

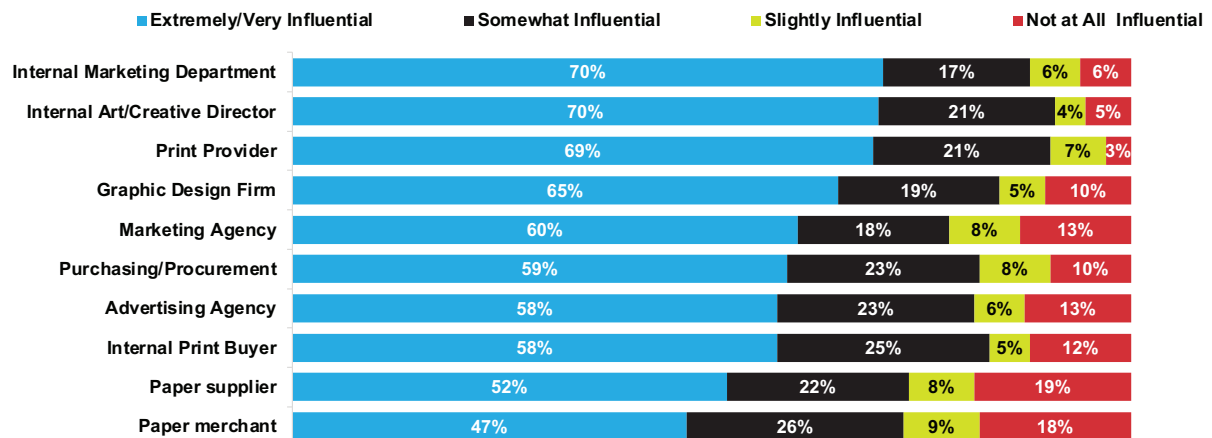
- “Price, speed of delivery, and the type of technology used are all big factors for me. Overall, I look for a provider that offers a good balance of quality, price, speed, and service.”
- “We expect high-quality printing that meets our specific requirements for color accuracy, sharpness, and overall aesthetic appeal.”

Key Print Influencers

When it comes to print production decisions — such as applications, finishing, and special effects — buyers identified internal marketing teams and creative directors as the most influential parties (Figure 14). Print providers and graphic design firms were also noted as key influencers. This highlights the critical role of internal teams in shaping print decisions and the need for effective communication with them.

Figure 14: Key Influencers Advising on Print Materials

Q. How influential are the following parties in advising you on how your print materials are produced (i.e., print specifications, size, finishing, special effects)?



n=166 Communication Buyers and Influencers
Source: Next Generation Inkjet Investment, NAPCO Research 2025

NAPCO RESEARCH

CONCLUSION

The findings of this research confirm that production inkjet has moved beyond early adoption into a phase of wider spread adoption and strategic reinvestment. With continued advancements in speed, quality, personalization, and cost efficiency, production inkjet is well-positioned to meet the evolving needs of print providers and customers alike. As more organizations adopt or expand their inkjet capabilities, the technology’s role as a catalyst for profitability, innovation, and long-term growth is only expected to grow.

WHO WE ARE



NAPCO Research crafts custom data-centric solutions that leverage our highly engaged audiences across the markets in which we operate, our industry subject matter experts and in-house research expertise. We partner with our clients to identify their unique business problem and create solutions that enable deeply informed decision-making.

NAPCO Research can help with:

- Business goal prioritization
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- Market conditions
- Benchmarking
- Industry trends
- Brand awareness

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WHO WE ARE



BILLERUD

Billerud provides paper and packaging materials that challenge conventional packaging for a sustainable future. We are a world leading producer of high-performing paper and packaging materials made from virgin fiber; passionately committed to sustainability, quality, and customer value. The company has nine production units in Sweden, USA, and Finland with around 6,100 employees in over 13 countries and customers in over 100 countries. Billerud is listed on Nasdaq Stockholm.

In the United States, Billerud operates out of a regional head office in Miamisburg, Ohio, two mills in Michigan's Upper Peninsula, a converting operation in Wisconsin and numerous distribution centers. We are a leading supplier of high-quality graphic and label papers, packaging materials, and market pulp.

Our distinguished graphic product line including sheets, web, digital and inkjet papers offer a broad selection of forest management and chain-of-custody certification options for all types of commercial printing applications. U.S. mills are strategically located near top industry printers across North America, so our products are available when you need them. Marketing leading brands including

- Sterling® Premium
- Productolith® Pts.
- Anthem Plus®
- Sterling® Premium Digital™
- Productolith Pts. Digital®
- Blazer Digital®
- TrueJet® Book
- Sterling® Ultra EX
- Sterling® Points EX
- Ideal® Jet EX
- Sterling® Ultra
- Influence®

From streamlined supply chain and flexible manufacturing capabilities to expert customer support, on-press technical service and insightful solutions that bring added efficiency and productivity straight to your business, we are ready to respond to market demands that best service our customers.

At Billerud, we build brands and business results for our customers. To learn more about our complete product offering, please visit billerud.com.



WHO WE ARE

Canon

Canon U.S.A., Inc. is a leader in digital imaging and printing solutions with one of the broadest portfolios in the industry, offering solutions such as digital presses, production inkjet presses, wide-format printers, work solutions and professional services. With approximately \$28.5 billion in global revenue, its parent company, Canon Inc., as of 2024 has ranked in the top-10 for U.S. patents granted for 41 consecutive years. Canon U.S.A. is dedicated to its Kyosei philosophy of social and environmental responsibility. To learn more about Canon, visit us at www.usa.canon.com



WHO WE ARE

RICOH
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Ricoh USA Production Print helps companies grow their businesses, improve customer engagement and maximize efficiencies by focusing on profitability, cost reduction and document integrity.

Ricoh builds alliances with printers to help move their business forward by providing them with the tools and expertise to help differentiate themselves from their competition. Its award-winning portfolio is built with the needs of its customers, partners and customers' customers top of mind including color management, wide-format and signage, continuous-feed inkjet, business development and much more. Ricoh's world-class professional services team and passionate professionals are focused on customer success. For more information, visit www.ricoh-usa.com.

