Transforming Textile Printing

• Determine outlook for analog to digital transition
• Gauge demand for digital textile production in different segments
• Identify barriers
Introduction
The potential for digital printing to influence the $165 billion printed textile market has long been promised, yet less than 1% of printed textiles are digitally printed today.

InfoTrends believes the time has finally come for digital technologies to significantly influence this market and is developing this multi-client study to answer key questions.

Digital printing has broken through from the proofing and prototyping market and is now viable for short-run production. The dominant production processes today are analog flatbed and rotary screen presses. Work currently produced on flatbed screen textile presses is now well within the capabilities of the latest generation of digital textile printers.

Demands from clients are also changing, and the combination of new demands and the technologies to meet them will transform the market. Understanding that transformation is crucial to being able to profit from it. We believe examples from adjacent printing markets such as VistaPrint and Mimeo in commercial printing, Build-a-Sign in signage and Ingram in books show the potential of digital printing to disrupt this market.

Major Factors Driving Change in the Global Textile Printing Market

Supply Chain Requirements
- Reduced cycles time – speed to market
- Elimination of excess inventory/control of cash flow
- Greater customization – better stand out and appeal to demand for individuality

Globalization
- Consistency & accuracy in global sourcing
- How new printing technologies can disrupt established supply chains
- On-demand production requires moving printing closer to point of need

Buyer Demands
- Faster cycle times – increase speed to market
- Better “stand out” through personalization and customization
- Improved visibility and accuracy from design to delivery through workflow management software
- Reduced inventory and improved cash flow by using short run print-on-demand
Advances in Printing Technologies

• Developments in inks for wider range of fabrics and applications
• Faster and more reliable jetting extends applications for digital printing
• Workflow management software simplifies origination, approval and production

New players/print service provider evolution

• New technologies and business models create risk and opportunity
• Entrepreneurial firms can develop compelling offerings using new models
• Graphics printing firms have transferable digital skills
• Textile printing firms have sector-specific expertise
• Understand SWOT and develop appropriate strategy

PSPs are primed for textiles. A recent survey with FESPA shows 38% of PSPs are expecting to diversify into interiors and 29% into fabric/garment printing.

Global Research Initiative

The research for this landmark study will have a worldwide reach with a focus on AP/J, EMEA and the U.S.

Market Research

InfoTrends will conduct extensive primary and secondary research in key industries and regions. The aim of this research is to understand deeply what the business issues different stakeholders within the supply chain have with the production of printed textiles and what they would like to address their unmet needs. It will also investigate their current awareness of digital textile print production in regard to meeting their requirements including quality, productivity, economics and sustainability. The interviewees will be selected to ensure as broad and deep coverage as possible covering the most important geographies and type and size of business as well as the full-breadth of the supply chain.

Project Objectives

This study will provide insight into the support your customers require in this channel and provide strategic support regarding how to move forward with initiatives in the textile space.

• Determine outlook for analog to digital transition in the textile printing market
• Gauge outlook for demand for digital textile production in different fabric segments (fabrics for garments, interiors, industrial textiles)
• Identify adoption barriers and pain points in current processes and validate enabling technologies to help subscribers compete more effectively
• Provide insight about the support end users require, provide strategic support and go-to-market recommendations

Primary Research

In-depth Interviews

InfoTrends will conduct 50 in-depth interviews using a structured interview guide with a mix of open and closed questions. These interviews are a mix of on-site visits and by telephone. The range of survey respondents will be based in Europe, Middle East and Africa, North America, and Asia-Pacific regions.
Clients will receive a combination of report, presentation material, and research data for senior management, product managers and planners, and sales and marketing executives.

The material will include:

- Executive Summary with key findings, and recommendations
- Detailed written report with text, charts, and graphs
- Market sizing and five year forecast 2011-2016
  - Hardware
  - Ink
  - Retail value
- Technology supplier and demand driver profiles
- Regional/country profiles detailing number of organizations, products and markets

### Breakdown of Interviewees by Supply Chain Position

<table>
<thead>
<tr>
<th>Fabric &amp; Design Specifiers (2/3 of Interviewees)</th>
<th>Producers (1/3 of Interviewees)</th>
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<tbody>
<tr>
<td>Fashion houses</td>
<td>Cloth weavers</td>
</tr>
<tr>
<td>Fabric designers</td>
<td>Hardware &amp; Software vendors</td>
</tr>
<tr>
<td>Retailers</td>
<td>Ink manufacturers</td>
</tr>
<tr>
<td>Wholesalers/distributors</td>
<td>Printers</td>
</tr>
</tbody>
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### Secondary Research

InfoTrends will leverage previously-published research it has conducted as part of its ongoing analysis of the textile market.

InfoTrends will also thoroughly examine other existing market information including industry trade associations, government agencies, published industry reports, trade articles, industry databases, company websites, and other sources.

### Analysis & Project Deliverables

InfoTrends will conduct extensive analysis of the desk research and in-depth interviews to develop a comprehensive understanding of the opportunities and issues for digital textile printing.

### Project Timeline

<table>
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<tr>
<th>Timeframe</th>
<th>Task Description</th>
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<tbody>
<tr>
<td>June/July</td>
<td>Develop interview guides</td>
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<tr>
<td>Ongoing</td>
<td>In-depth interviews, desk research</td>
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<tr>
<td>September/</td>
<td>Market analysis and forecast</td>
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<tr>
<td>October:</td>
<td></td>
</tr>
<tr>
<td>November:</td>
<td>Distribute final deliverables</td>
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Timely Delivery
InfoTrends will take all reasonable steps to ensure that the time scales called for by the proposed study are met in accordance with the agreed-upon schedule, but no liability can be accepted for the consequences of delays, howsoever caused.

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One half of fee upon initiation and one half upon report delivery.
Subscribe Today!

For more information, join Barney Cox as he discusses how this study will take a look at major factors driving change in the global textile printing market. Transforming Textile Printing will answer key questions surrounding how digital technologies will significantly influence this space.

Authorization Form

<table>
<thead>
<tr>
<th>Subscription includes:</th>
<th>$16,995</th>
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<tbody>
<tr>
<td>Written report</td>
<td>x</td>
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<tr>
<td>PowerPoint Presentation</td>
<td>x</td>
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<tr>
<td>Data Tabulation</td>
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InfoTrends is the leading worldwide market research and strategic consulting firm for the digital imaging and document solutions industry. We provide research, analysis, forecasts, and advice to help clients understand market trends, identify opportunities, and develop strategies to grow their businesses.

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