![InfoTrends]

The Future of Digital Packaging Workflows

完成のご案内

パッケージ・ワークフローの将来

パッケージ市場は、デジタル移行への転換期をむかえています。デジタル印刷機のイノベーション、生産的/統合的ワークフローツール、ブランドオーナーのデジタル技術への要望が重なり、パッケージが最も効果的および効率的に生産できるのかを考えなおす転機をもたらしています。

ワークフロー・ソフトウェアは、この変化を起こす中心にあります。

当調査では、

● パッケージソフトウェア市場がどこに向かっているのか？

● 進展するデジタル機会に直面する顧客企業に対して、どのように利益利点をもたらすことができるのか？

について、深い知見を提供することを目的とし、4 つのセクションによって構成されています。

● コンバーター（印刷会社）のトレンド
  ➢ By converter type: label, flexible packaging, folding carton and corrugated converters
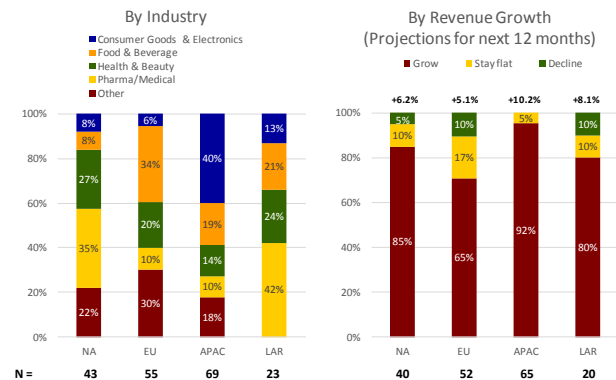 ➢ Research Findings
  ➢ In-depth Interview Summaries
● ブランドオーナー（企業）
  ➢ By brand owner
  ➢ Research Findings
  ➢ In-depth Interview Summaries
● 市場規模
  ➢ Converter Establishment Market Size
  ➢ End-user Software Sales Market Size
● Software company profiles
 ➢ Two page summaries of key software providers

■ 調査方法 & 調査地域

• 電話アンケート（CATI）： 173 件（Converters） 177 件（Brand Owner）
  ➢ North America (United States), Europe (UK, Germany, France, Italy, and Poland), Asia Pacific (China, India, Thailand), and Latin America (Brazil and Mexico)
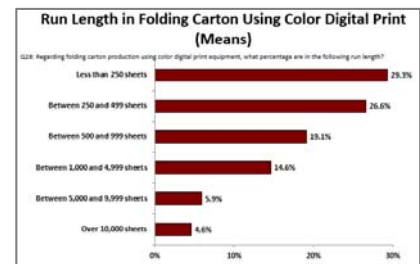• 電話インタビュー調査: 18 件（10 converters and 8 brand-owners）

■ 価格

• 調査レポート 一式 $29,995 （税別）

  ➢ A: Brand Owners & Creative Trends Section　　　　$14,995 （税別）
  ➢ B: Production Workflow Optimization Trends Section　$14,995 （税別）
  ➢ C: Market Sizing Section　　　　　　　　　　　　$9,995 （税別）

- Country of Origin
- Job Title
- Functional Department
- Packaging Responsibilities
- Involvement in Packaging Areas
- Types of Packaging Involved In
- Type of Company
- Primary Industries
- Company Revenue
- Expected Revenue Change
- Number of Employees
- Number of SKUs
- SKU Lifespan
- Percent of SKUs Refreshed per Year
- Refresh Rate Growing or Declining?
- Label and Packaging Priorities in Next 12 to 24 Months
- Label and Packaging Priorities in Next 12 to 24 Months （Means）
- Digital Transformation Objectives in Next 12 to 24 Months
- Digital Transformation Objectives in Next 12 to 24 Months （Means）
- Digital Transformation Objectives
- Digital Transformation Objectives （Means）
- Top Challenges in Digital Transformation of Packaging
- Initiator of Digital Packaging Transformation Initiatives
- Outside Expertise for Digital Transformation Required?
- Likelihood of Working with Consultants on Packaging-Related Digital Transformation Initiatives
- Likelihood of Working with Consultants on Packaging-Related Digital Transformation Initiatives （Means）
- Owner of Artwork Management System
- Internal Stakeholders with Access to Centralized Artwork Management System
- External Stakeholders with Access to Centralized Artwork Management System
- IT Spending on Packaging Artwork Management Systems （On-Premise）
- IT Spending on Packaging Artwork Management Systems （SaaS）
- Expected Change in IT Spending on Artwork Management System in Next 12-24 Months
- Annual Savings from Using Centralized Artwork Management System
- Centralized Artwork Management System Used for Marketing Materials
- Time from Idea Conception to Packaging on Shelves
- Time to Perform Product Refresh
- Ordering System Connected to Supplier's
- Lead Time
- Amount of Labels and Packaging Discarded
- Lead Time Reduction Importance
- Obsolescence Initiatives Underway
- Agreement with Statements （1）（2）
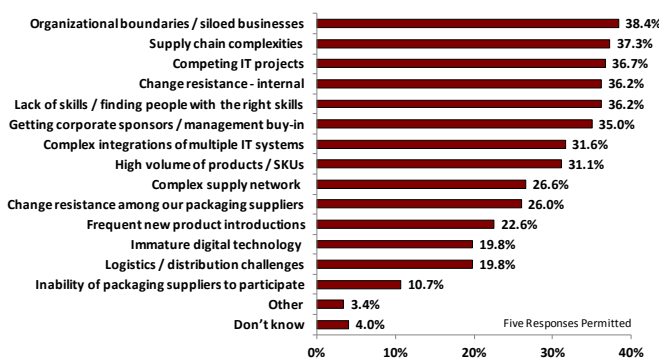
調査レポート PPT チャート資料目次 （Converter 調査 Chart）：N=173
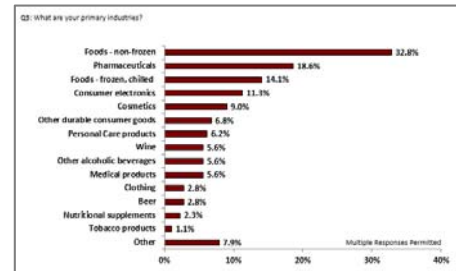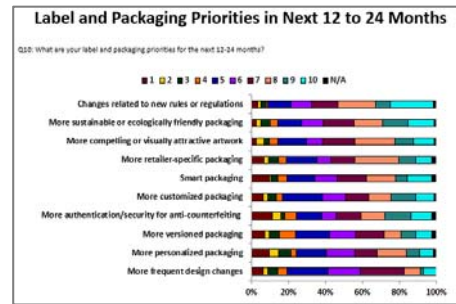
- Country of Origin
- Job Title
- Company Type
- Sources of Revenue
- Familiarity of Workflow Software
- Level of Involvement in Workflow Investments
- Company Revenue
- Expectations of Company's Revenue
- Number of Packaging Print Facilities
- Number of Employees Working at Company
- Number of Employees Working at Production Facility
- Annual Spending on Printing Hardware/Equipment
- Annual Spending on Software
- Investment in Workflow Areas in 1-2 Years – Automated Production
- Investment in Workflow Areas in 1-2 Years – Process Improvements
- Investment in Workflow Areas in 1-2 Years – Integrations or Technological Improvements
- Investment in Workflow Areas in 1-2 Years – Enabling new products or services
- Workflow-Related Challenges (1)
- Workflow-Related Challenges (2)
-
- Type of Conventional Equipment Owned and Used in Label Printing Operation (Means)
    - Types of Finishing Processes – Label Converters
    - Average Web Width for Label Converters
    - Print Job Run Lengths in High Quality Color Labels (Means)
    - Print Job Run Lengths in Lower-Quality Labels (Means)
    - Digital Printing Devices Owned in Label Printing Operation (Means)
    - Digital Print Volume in Run Lengths (Means)
    - Source of Film or Other Flexible Packaging Media
-
- Conventional Equipment in Flexible Packaging Printing Operation (Means)
    - Processed Used for Finishing in Flexible Packaging
    - Print Job Run Lengths in Packaging Production (Means)
    - Average Web Width
    - Digital Printing Devices Owned in Label Printing Operation (Means)
    - Run Length in Flexible Packaging Using Color Digital Print (Means)
-
- Conventional Equipment for Folding Cartons (Means)
    - Types of Finishing Processes – Folding Carton Converters
    - Run Length with Carton Production using Sheetfed (Means)
    - Run Length with Carton Production using Webfed (Means)
    - Digital Printing Devices in Folding Carton Operation (Means)
    - Run Length in Folding Carton Using Color Digital Print (Means)
-
- Source of Corrugated Board
    - Post-Print vs. Pre-Print Process for Corrugated Printing

Investment in Workflow Areas in 1-2 Years - Process Improvements

Q13: In what TOP FIVE workflow areas are you going to invest in the next 12 - 24 months? - Process Improvements

Production tracking, verification	42.5%
Color management	29.8%
Increase workflow / software security	22.9%
Quality certifications, e.g. ISO 9001	21.6%
Food safety certifications, e.g. ISO 22000	21.6%
Quality improvements, e.g. higher resolution screening/printing	20.3%
Training / Cross-Training of Staff	20.3%
Lean manufacturing / better plant layout	11.1%
Compliance to regulatory standards	10.5%

Multiple Responses Permitted

Run Length in Folding Carton Using Color Digital Print (Means)

Q28: Regarding folding carton production using color digital print equipment, what percentage are in the following run length?

Less than 250 sheets	29.3%
Between 250 and 499 sheets	26.6%
Between 500 and 999 sheets	19.1%
Between 1,000 and 4,999 sheets	14.6%
Between 5,000 and 9,999 sheets	5.9%
Over 10,000 sheets	4.6%

ver.100

- • Print Systems Used for Post-Print (Means)
  - • Print Systems Used for Pre-Print (Means)
  - • Conventional Equipment in Corrugated Packaging Printing Operation (Means)
  - • Types of Finishing Processes – Corrugated Converters
  - • Largest Sheet Size with Corrugated Production Post Print (Means)
- •
- • Smallest Media Size Printed (Means)
- • Most Common Media Size Printed (Means)
- • Run Lengths for Sheets (Means)
- • Run Lengths Using Color Digital Print (Means)
- •
- • Customer Segments for Labels Printed on Conventional Presses (1)
- • Customer Segments for Labels Printed on Conventional Presses (2)
- • Customer Segments for Labels Printed on Digital Presses (1)
- • Customer Segments for Labels Printed on Digital Presses (2)
- • Customer Segments for Flexible Packaging Printed on Conventional Presses (1)
- • Customer Segments for Flexible Packaging Printed on Conventional Presses (2)
- • Customer Segments for Digitally-Produced Flexible Packaging (1)
- • Customer Segments for Digitally-Produced Flexible Packaging (2)
- • Customer Segments for Folding Cartons Printed on Conventional Presses (1)
- • Customer Segments for Folding Cartons Printed on Conventional Presses (2)
- • Customer Segments for Folding Cartons Printed on Digital Presses (1)
- • Customer Segments for Folding Cartons Printed on Digital Presses (2)
- • Customer Segments for Corrugated Shipping Boxes Printed on Conventional Presses(1)
- • Customer Segments for Corrugated Shipping Boxes Printed on Conventional Presses(2)
- • Customer Segments for Digitally-Produced Corrugated Boxes(1)
- • Customer Segments for Digitally-Produced Corrugated Boxes(2)
- • Customer Segments for Conventionally Produced Corrugated Displays(1)
- • Customer Segments for Conventionally Produced Corrugated Displays(2)
- • Customer Segments for Digitally-Produced Corrugated Displays/Retail Stands (1)
- • Customer Segments for Digitally-Produced Corrugated Displays/Retail Stands (2)
- •
- • Reasons for Customers to Buy Digitally Produced Packaging or Labels
- • Expectation on Print Volume in the Next Year
- • Expectation on Print Volume in the Next Year (Means)
- • Volume Breakdown Between Conventional & Digital Printing (Means)
- • Expectation on Volume Breakdown in Two Years (Means)
- • Revenue Breakdown Between Conventional and Digital (Means)
- • Expectation of Revenue Breakdown in Two Years (Means)
- • Breakdown of Conventional vs. Digital Jobs Printed (Means)
- • Print Volume with Static/Variable Items
- • Print Volume with Static/Variable Items (Means)
- • Services Offered
- • Software Used to Create/Edit Design of Labels/Packaging
- • Digital Asset Management System Ownership
  - • Reasons for not Investing in a Digital Asset Management System

- Print-specific MIS/ERP System
  - Reasons for Developing Own Print-specific MIS/ERP System
- Web-to-Print System
  - Reasons for Buying/Investing in Web-to-print Solution
  - Reasons for not Investing in a Web-to-print Solution
  - Web-to-print System Integrated with ERP/Print-MIS Solution
  - ERP/Print-MIS Solution Integrated with ERP/Ordering Systems
- Current Volume Ordered Automatically
  - Current Volume Ordered Automatically (Means)
- Conventional Workflow Management System
  - Key Vendor for Conventional Workflow Management
- Digital Workflow Management System
  - Key Vendor for Digital Workflow Management
  - Conventional Workflow Management System to Prepare Files for Digital Devices
- Color Management Software
  - Agreement on Statements Regarding Color Management
  - Agreement on Statements Regarding Color Management (Means)
  - Agreement on Statements Regarding Proofing
  - Agreement on Statements Regarding Proofing (Means)
- Volume Requires 4+ Colors to Meet Customer Requirements
  - Volume Requires 4+ Colors to Meet Customer Requirements (Means)
- Matching of Color Conversion Jobs (Means)
- Future Professional Service Purchases from External Vendors (1)
  - Future Professional Service Purchases from External Vendors (2)
- Opinion on Cloud-Based Software-as-a-Service
  - Likes About Cloud
  - Dislikes About Cloud
- Opinions on Statements
  - Opinions on Statements (Means)

Category	%
Organizational boundaries / siloed businesses	38.4%
Supply chain complexities	37.3%
Competing IT projects	36.7%
Change resistance - internal	36.2%
Lack of skills / finding people with the right skills	36.2%
Getting corporate sponsors / management buy-in	35.0%
Complex integrations of multiple IT systems	31.6%
High volume of products / SKUs	31.1%
Complex supply network	26.6%
Change resistance among our packaging suppliers	26.0%
Frequent new product introductions	22.6%
Immature digital technology	19.8%
Logistics / distribution challenges	19.8%
Inability of packaging suppliers to participate	10.7%
Other	3.4%
Don't know	4.0%

Five Responses Permitted

N = 177 Respondents

株式会社 インフォトレンズ： http://www.infotrends.co.jp/corporate-profile/

米国のボストンに本社を置く InfoTrends 社の日本法人。デジタルイメージング市場、ドキュメントソリューション市場に特化した調査活動で高い評価を得ており、市場動向の分析レポートの企画販売、コンサルティングサービスを行っています。（担当： 清水、水村）： TEL:03-5475-2663 Email: mail@infotrends.co.jp