IDC MarketScape

IDC MarketScape: Worldwide High-Speed Inkjet 2025 Vendor Assessment

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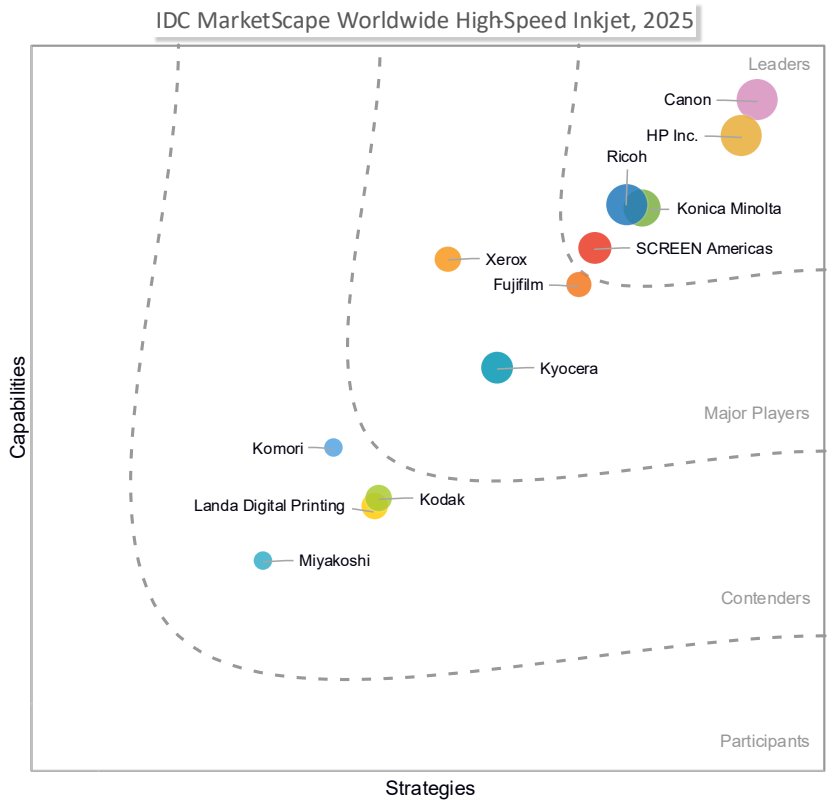
THIS EXCERPT FEATURES CANON AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide High-Speed Inkjet Vendor Assessment



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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide High-Speed Inkjet 2025 Vendor Assessment (Doc # US52990625).

IDC OPINION

This IDC MarketScape assesses vendor activities in the worldwide high-speed inkjet (HSIJ) press market. This document uses the IDC MarketScape research methodology to evaluate multiple quantitative and qualitative criteria to measure each vendor's position in the market. The evaluation is based on a standardized set of parameters, which IDC used to produce a comparative analysis of these high-speed inkjet press market participants.

The high-speed inkjet market is a segment of the production printing business that holds a lot of promise, but in some ways, the technology is ahead of demand. The speeds of these high-speed inkjet systems continue to increase as improved inkjet printheads, ink, and drying technologies come online. In fact, IDC sees that equipment manufacturers continue to innovate on all fronts to improve the quality available from high-speed inkjet presses, even as they improve the economics of digital printing and make presses easier to operate.

Since it is a market with large stakes, the segment sees significant activity, with more than 10 major global suppliers operating as manufacturing suppliers.; Athey should because print shops that have invested in high-speed inkjet systems are reporting dynamic growth, and the suppliers are seeing double-digit growth in page volume through those installed devices. Furthermore, as print quality improves, high-speed inkjet systems are able to produce a greater volume of high-coverage print jobs, which means more revenue per job.

As Costs Go Up, They Must Come Down

Print service providers are often shifting offset print volumes onto high-speed inkjet presses for cost reasons, such as:

- The cost of materials, such as paper and aluminum, is going up. Paper costs are pushing companies to switch to digital production because digital has less paper waste than traditional offset. Also, the cost of aluminum is increasing, so making aluminum offset plates is becoming more expensive, changing the dynamic

between offset and digital production. Print service providers recognize the trend toward smaller runs, which magnifies these costs and drives investments in digital production equipment.

- Labor costs are escalating. According to IDC's 2025 *Production and Large Printing Survey*, about 40% of print service providers report having labor issues within the past 12 months. If print shops can't find employees to operate their equipment, they occasionally change to digital equipment so that it is easier to operate and to find employees whom they can train to operate it. Another effect of rising labor costs is the need for more highly automated equipment. Through this research, IDC has encountered multiple operations that used to have four employees operating a single press; now they have one or two employees operating two or three production digital printers.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The inclusion criteria for this document are that the vendor must offer a product that falls within IDC's definition of a high-speed inkjet for document printing. That means document printers that start at printing 150 A4-size documents per minute. These solutions must be commercially available worldwide, or at least in several major regions, and ideally would have at least a handful of users who can report on their satisfaction with the company's products and services. This analysis includes 12 vendors that are known OEMs that meet these criteria.

ADVICE FOR TECHNOLOGY BUYERS

It would be an overstatement to report that commercial printers and others in the high-volume document production business are rapidly adopting high-speed inkjet presses. However, the major value propositions of high-speed inkjet — greater speed and lower operating costs — do increasingly meet the needs of those in the production printing market. IDC's 2025 *Production and Large Format Printing Survey*, indicates that up to 66% of print jobs need to be produced within three days of when the order is placed, which is a fast turnaround time. Furthermore, print service providers report in that same survey that keeping up with changing technologies and understanding and maintaining profitability are some of the biggest challenges they face in the production market. Users further report high levels of interest in new technology investments, to remain as competitive as possible, and high-speed inkjet solutions.

However, high-speed inkjet presses remain a considerable investment. In these times of high interest rates and fast expectations for ROI, print service providers are not just looking for a supplier; they are looking for a technology partner. As such, print service providers are interested in more than the solutions a company offers; they also

consider the financial health of their suppliers. Nobody wants to invest in a device only to have service and support evaporate as the equipment vendor or its representatives move on because supporting existing customers is not as profitable as selling more machines. Customers increasingly want a two-way relationship with their technology partners where they can provide feedback and get fast support. They want to be able to make suggestions so that their solutions can be as productive and profitable as possible. To that end, IDC offers some suggestions to equipment vendors:

- **AI and automation:** At the recent Printing United event, one print service provider reported that while their production print volume had grown nicely over the past few years, the number of jobs had grown approximately tenfold. That means that the amount of work that goes into prepress may have expanded at the same rate. This is the type of proof point that illustrates the need for equipment vendors to consider every facet of the production workflow to seek ways to streamline and automate production. Many manufacturers have embraced AI tools to create opportunities to have elements of a workflow, such as file prep and imposition, automated to streamline production.
- **Proof:** Reporting better economics is easy to say, yet harder to prove, but the data is there. Manufacturers should use real-world operating and print job data to show how high-speed inkjet printing can help companies produce more revenue and profits, not just on a hardware-related "per sheet" basis but by improving the speed at which they can move work through their operation and meet tighter deadlines, use less expensive substrates, and lower power consumption.
- **Creating a community:** Some of the established digital print solutions vendors have created wonderful events and user groups to facilitate communication between their end users. Sometimes those groups provide feedback that perhaps, technology vendors don't like to hear, but they always provide feedback that vendors need to hear. All manufacturers should provide the kinds of mechanisms that allow users to learn from each other, network, and even offer technical and business advice to one another. It doesn't have to be a major production; even an online community is better than none. Manufacturers should be involved and closely monitor these communities to make determinations about future products, directions, and necessary partnerships.

Significant High-Speed Inkjet Trends

- **Wider variety of media equates to more applications:** Many vendors report that customers are asking them to create solutions that push the boundaries of materials, both in size and basis weight, so that they can produce a wider range

of applications. More applications mean greater print volumes, and higher print volumes equate to faster ROI.

- **Sustainability:** According to IDC's 2025 *Production and Large Format Printing Survey*, 58% of print service providers report that they are seeing a growing demand for more sustainable printing. What that often means is that they are being asked to print on papers and films with a higher percentage of recycled materials, use different hardware and ink combinations, or produce products that consume less energy. The demand for more sustainable production aligns directly with the growing demand for high-speed inkjet solutions that use water-based inkjet, along with less energy-intensive drying mechanisms.
- **Faster turnaround and ecommerce:** Per that same IDC survey, as many as 40% of print service providers offer online order taking. So end users expect to be able to submit online orders and get fast turnarounds, almost as if their print service provider is Amazon.com. In fact, many of the online providers offer the kind of fast turn, instant fulfillment that Amazon does. This places a tremendous stress on production equipment and front-end and finishing systems, but these are all being automated to amplify their capabilities to meet those customer needs.
- **Modern and upgradable systems:** If the business model for printed products increasingly mirrors Amazon.com, then the business model for production digital printing systems more closely mirrors Tesla. Print service providers want solutions that like Tesla cars, get better with age. They want production solutions that are modern and upgradable so they can evolve as customer needs mature.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Canon

Canon is positioned in the Leaders category in this 2025 IDC MarketScape on worldwide high-speed inkjet 2025.

Since the last iteration of this study, in which Canon was already in the Leaders category, Canon has made significant strides to bolster its position in the segment. Notably:

- Canon has extended the capabilities of some of its established high-speed inkjet products.

- Canon introduced its own 1,200dpi piezo inkjet printhead platform and products based on it.
- Canon has announced innovation in the area of service execution and delivery to create more control for end users and, ultimately, higher uptime.
- Canon has worked with multiple industry partners to add solutions for finishing. Recently, Canon has also amended its routes to market with an agreement with Heidelberg for the use of Canon's high-speed inkjet cutsheet engines. (Heidelberg is marketing the products as the Jetfire 50 and, starting in 2026, the Jetfire 75.) This is already paying dividends and should be a major growth driver in the years ahead.
- Canon has added plans for complementary products in the label and packaging markets that will be available in the near future.

Furthermore, Canon has revealed several innovations that will continue to add value and protect customer investments in high-speed inkjet solutions in the future.

Quick facts about Canon include:

- **Employees:** Approximately 180,000 worldwide
- **High-speed inkjet printer portfolio:** Canon's portfolio features a wide range of both continuous feed and cutsheet inkjet products:
  - **Continuous feed products include:**
    - Canon ColorStream 8000 series, from 262 to 656fpm
    - Canon ColorStream 6000 series, from 157 to 417fpm (mono: up to 492fpm)
    - Canon ColorStreamZ series, from 157 to 417fpm (mono: up to 492fpm)
    - Canon ProStream 3000 series, from 131 to 525fpm
    - Canon ProStream 2000 series, from 131 to 436fpm
    - Canon ProStream 1000 series, from 131 to 436fpm (no longer available in EMEA)
    - LabelStream LS2000 (aqueous inkjet label press, 40mpm, 340mm width); should be available in 2026
  - **Cutsheet products include:**
    - Canon varioPRINT iX3200, prints up to 320 A4 images per minute (ipm)
    - Canon varioPRINT iX2100, prints up to 210 duplex A4 ipm
    - Canon varioPRINT iX1700, 170 A4 ipm
    - Canon has also previewed the varioPRESS iV7, a B2-sized sheetfed inkjet press that is expected to have a rated speed of 8,700 B2-sized sheets per

hour. The iV7 is a noteworthy addition to the Canon portfolio entering the market.
        - corrPRESS iB17, a high-speed inkjet printer for the corrugated market, will be available in 2027
    - It should be noted that not all of these products are initially available in all markets.
    - Canon also has a large presence in the toner-based digital press market and offers a wide range of large-format printing solutions.
- **Global market coverage:** Canon is a global supplier, with installations and support available on all continents.
- **Main industry focus:** Commercial printing, direct mail, book and publishing, label converting, transaction, and specialty applications
- **Ideal customers:** Print service providers, label converters, and organizations needing adaptable production from mid to high volumes
- **Distribution methods:** Primarily direct sales, with select certified dealers in some regions
- **Core capabilities:** Canon's presses use its own printhead technology and innovative ink systems (such as water-based polymer inks, 1,200dpi printheads, proprietary waveforms), combining offset-level quality, color consistency, and substrate versatility. Features include inline sensors for color profiling and automated maintenance.

Strengths

Canon maintains a strong presence in the market, with continued growth in new installations and page volume. Canon is able to prove its value and success with many proven installations. Real-world production and utilization data prove uptime claims.

Canon has its own imaging technology, proprietary ink sets, proven media transport technology, image quality control capabilities, image processing, and splice handling technologies. In the varioPRINT iX1700, Canon combines the company's inks, printheads, paper feed, and drying and fixing technologies to enable a larger variety of media.

Canon is also in a strong position through the development of its digital front-end solutions (PRISMA) that optimize workflows, file processing, and the operator interface for its high-speed presses. Canon continues to develop and grow its community of inkjet users, and its communication platform thINK, which delivers very strong value in educational and networking opportunities to Canon high-speed inkjet users. Some of the notable print service providers are established contributors to the Canon high-speed inkjet community.

Canon is investing more and more while optimizing personnel roles to create more direct customer feedback to R&D.

Canon equipment is not at the bottom of the price range, but users indicate that the overall value of Canon solutions offsets any price difference.

Canon has made significant improvements to some of its platforms, providing investment protection to its end users. An example is the development of full automation of the splice handling, reducing production downtime by lifting printheads to allow the splice to pass without a print stop and reducing paper waste by around 100m (367ft) (small variations depending on model and speed) for the ColorStream 8000 and ProStream series.

It has increased the print speed of the ColorStream 8000 to 200mpm (656fpm) to enhance productivity. Canon also has an initiative to drive more automation through the continuous feed segment by more closely connecting continuous feed and finishing systems. The goal is to enable more automation and reduce labor costs.

All systems offer features such as automated printhead cleaning and inline image correction, which enhance print reliability, regulatory compliance, and expand application range. Furthermore, select models offer certified food-safe inks (LabelStream LS2000).

Canon has well-developed supply chains that have already scaled up. It has an extensive global service network with fast response times and reliable parts availability worldwide. Canon is innovating in the area of service, designing programs that enable print service providers to train them to perform different levels of service on their Canon HSIJ equipment to reduce downtime.

Challenges

Canon believes its customer focus and the need to enable an ever-wider range of applications through greater media flexibility are among its major challenges.

Canon is being challenged to improve automation and ease-of-use characteristics of its presses to help ease the burden of finding labor for its customers.

Canon is still in the early stages of its direct participation in the packaging segment, but the 2026 launch of LabelStream and forthcoming corrPRESS iB17 products mark the advancement of Canon in the packaging segment.

Consider Canon When

Consider Canon if your organization already partners with Canon or seeks to expand into high-speed inkjet with proven print quality, robust automation, and reliable direct support for commercial, transaction, or label production.

Also consider Canon if you are seeking a long-term partnership with your selected vendor,or you rely on the vendor for support and advice and want to be involved in a close community of end users for ongoing collaboration and support that also provides direct feedback to the manufacturer.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to

provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

The study comprises inkjet presses (both continuous form and sheetfed/cutsheet) capable of printing 11 x 17 pages or greater width and at speeds in excess of 90ppm (A4), and only includes document presses (excludes label and packaging presses).

The main production print markets include transaction (statements, envelopes), publishing (books, magazines, and newspapers), direct mail (catalogues, brochures, marketing collateral, and postcards), and general commercial print.

Inkjet presses within the study's scope include a variety of inkjet printhead types, including thermal, continuous, and piezoelectric, mainly using aqueous pigment or dye-based inks.

LEARN MORE

Related Research

- *New Large Format and Production Print Products from Printing United* (IDC #US53905525, November 2025)
- *Kyocera and Xerox Connect for Cutsheet High-Speed Inkjet Press* (IDC #lcUS53717025, August 2025)
- *U.S. Production Print Market Shares, 2024: Driving Value in Challenging Times* (IDC #US53257625, March 2025)
- *IDC MarketScape: Worldwide High-Speed Inkjet Press 2023 Vendor Assessment* (IDC #US50450723, April 2023)

Synopsis

This IDC study assesses the vendor activities of the major players within the high-speed inkjet market.

"The high-speed inkjet market is among the most competitive segments of the production printing market, with important product entries from essentially all of the market leaders," said Tim Greene, an analyst covering the production printing market at IDC. "We're seeing that high-speed inkjet increasingly addresses the market needs and customer demand for high quality, fast turnaround, and lower operating costs, so it is a critical segment of the total print market."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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