



Finishing: Production Inkjet's Next Frontier

Survey-based analysis of finishing's impact
and expanding role in production inkjet.



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WHO WE ARE



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INTRODUCTION

Production inkjet has evolved into a high-speed platform, with faster printing engines and greater sustained productivity, while the range of press formats has expanded significantly. Early high-volume production inkjet adoption was largely driven by continuous-feed (web) platforms, but the market has since evolved to include cutsheet and a growing range of presses in different sizes and configurations. As a result, print providers can produce more work across a broader mix of applications. This shift is placing greater demands on finishing to support higher volumes and increased application complexity.

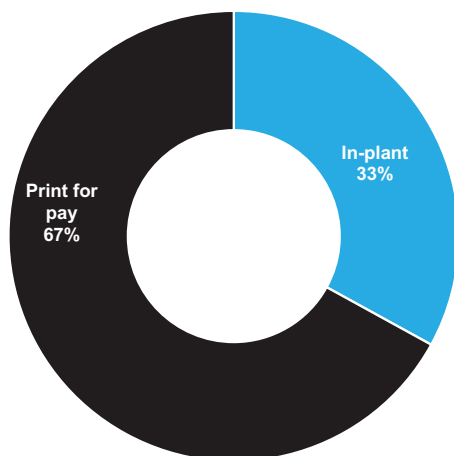
As production inkjet capabilities have advanced, finishing, not printing, has emerged as the primary factor in determining overall productivity, because finishing processes are more complex, less standardized, and harder to automate and integrate at the same pace as high-speed inkjet printing. This study was conducted to better understand how finishing is impacting productivity, where constraints exist, and how print providers are adapting their investment and automation strategies in response.

The study 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:

- 182 print providers (see **Figure 1** for provider type breakdown), including 60 inkjet adopters (47 print-for-pay and 13 in-plant operations)
- 207 communication buyers and influencers involved in specifying or purchasing print

Figure 1: Print Provider Respondent Base

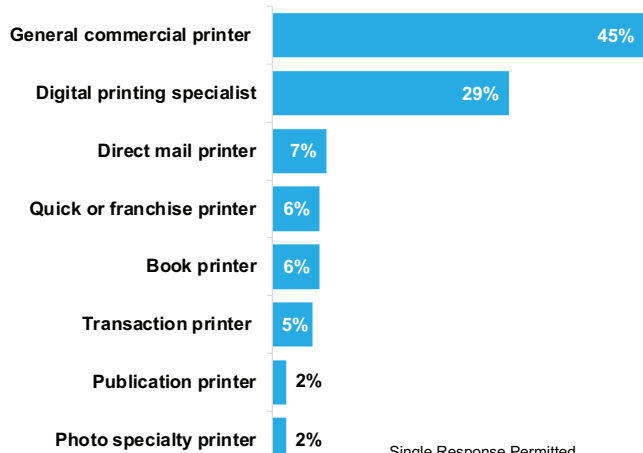
Q. Which category best describes your company's PRIMARY business?



n=182 Print Providers

Source: Finishing: Production Inkjet's Next Frontier, Alliance Insights 2026

Types of Print for Pay Providers



Single Response Permitted



The findings indicate that finishing is now a key factor in overall production inkjet performance. A majority of print providers participating in the survey indicate that finishing limits throughput in their operations, and nearly all say finishing is important to realizing the full productivity of production inkjet. In response, many are placing greater emphasis on finishing investments, particularly in areas such as automation and workflow integration.

Customer expectations are also contributing to this shift. Print buyers report that finishing affects the effectiveness of printed materials and is an important consideration when selecting a print service provider. Demand for more complex and highly finished applications is expected to grow, further increasing the importance of finishing capabilities.

KEY FINDINGS

Finishing Is Increasingly Impacting Production Inkjet Productivity

- As production inkjet speeds increase, finishing is playing a larger role in overall performance. Eighty-three percent of print providers report that finishing, not printing, is now the main constraint on production inkjet throughput, and only 22% say finishing is not a bottleneck.
- Print providers recognize the importance of finishing to inkjet success. Ninety percent of respondents report that finishing capabilities are critical to realizing productivity gains, while 88% believe future finishing investments will deliver greater returns than faster inkjet presses. Additionally, 77% say finishing and workflow capabilities are increasingly influencing production inkjet purchasing decisions.

Finishing Workflows Are Functional But Not Optimized

- Most finishing environments are operating with limitations. Only 18% of print providers with production inkjet presses say their finishing workflows fully meet operational needs, while 55% report partial limitations and 22% rely on workarounds that introduce manual steps and inefficiencies.
- Key production inkjet throughput constraints include labor availability, cited by 43% of provider respondents, followed by job setup and makeready (35%), finishing speed relative to press speed (35%), and material handling inefficiencies (30%). These factors collectively reduce efficiency and limit the scalability of inkjet production.

Automation and Integration Between Print and Finishing Remain Limited

- Respondents report that finishing workflows remain only partially connected. Across key integration points, 60% to 75% of print providers report only partial or no automation, including job data transfer, finishing setup, and production tracking.
- Survey respondents report that closed-loop visibility is rare. Only 13% of print providers report fully automated feedback from finishing systems back into workflow platforms, limiting the ability to track performance, identify bottlenecks, and optimize operations.
- At the task level, finishing remains highly manual. Stacking and palletizing (82%), inspection (77%), folding setup (72%), and binding adjustments (62%) are still primarily manual processes.

Integration Complexity Is a Key Barrier to Automation

- Print providers that operate inkjet press(es) identify workflow and integration challenges as key barriers to finishing automation. While capital cost is cited by 83% as a major/moderate limitation to greater adoption of finishing automation, 71% point to integration complexity, and 62% cite uncertainty around ROI.
- Available floor space also presents a constraint in automating finishing for 53% of providers that operate production inkjet press(es), while only 32% cite workforce resistance or change management as a barrier, indicating that the challenge lies more in connecting systems than in adopting new technology.

Investment Is Shifting Toward Workflow and Finishing Integration

- Investment plans for supporting production inkjet finishing are moving beyond hardware to workflow integration as software and workflow integration ranked as the top investment priority (50%).
- Print provider respondents with production inkjet also plan to invest in binding systems (38%), nearline finishing (35%), inline finishing (33%), inserting (30%), and automated cutting and folding (30%) to support finishing needs.
- Survey respondents' investment focus reflects the need to manage increasingly complex customer requirements rather than simply increase production speed.

Application Diversity Is Driving Finishing Complexity

- Production inkjet supports a broad mix of applications, as respondents report using the technology to print direct mail (57%), books (30%), and manuals or training materials (27%). Each application introduces unique finishing requirements, increasing workflow complexity.
- As a result of application diversity, most providers operate hybrid finishing environments. Respondents report offline finishing accounts for 38% of production inkjet, followed by mixed environments (28%), inline (18%), and nearline (15%). The factors that influence how production inkjet jobs are finished include job volume (72%), capacity constraints (47%), and application complexity (45%).

Customers Increasingly Value Finishing Capabilities

- Finishing plays a key role in customer decision-making. Eighty-eight percent of communication buyer respondents indicate finishing capabilities are extremely or very important when selecting a print provider, while 95% say enhanced finishing improves the effectiveness of printed materials.
- Demand for more complex finished products is rising. Seventy percent of print buyer respondents expect increases in complex finishing of their printed materials over the next two to three years, with the strongest increases reported among younger generations, including 80% of Generation Z respondents expecting growth.
- Top finishing capabilities valued by print buyers include variable finishing for personalization (43%), binding (37%), cutting and trimming (35%), embellishments (33%), and mailing or fulfillment integration (33%).

Finishing Performance Directly Impacts Customer Experience

- Customers report ongoing challenges tied to finishing quality and execution. Thirty-one percent cite inconsistent finishing quality, 30% report requesting rework, and 27% identify turnaround time as a concern.
- These issues highlight that finishing is not only an operational constraint but also a key factor influencing customer satisfaction and perceived print value.

A Gap Exists Between Inkjet Capability and Finishing Performance

- Finishing limitations are not solely driven by technology gaps, but also by investment decisions. Seventy-three percent of providers that operate production inkjet press(es) expect to continue using legacy offset finishing equipment alongside inkjet equipment, reflecting a reliance on existing assets that may not fully align with production inkjet performance requirements.

- This gap limits the ability of print providers to fully realize the productivity, efficiency, and revenue potential of their inkjet investments.

Competitive Advantage Is Shifting to Finishing and Workflow Execution

- The ability to efficiently produce complex, high-quality finished products is becoming the key differentiator in production inkjet. Providers that invest in finishing automation, integration, and capabilities are better positioned to improve throughput, reduce costs, and meet evolving customer expectations.
- As the market continues to evolve, success will increasingly depend on how well print providers manage and connect the entire production workflow, not just how fast they can print.

INKJET ELEVATED PRINT, FINISHING DETERMINES PERFORMANCE

Production inkjet has changed the role and economics of print manufacturing. While earlier digital technologies introduced the benefits of no plates and reduced makeready, production inkjet extends those advantages into high-volume production environments.

As production inkjet adoption has accelerated, print providers are integrating these presses into existing operations and shifting increasing volumes onto them. In doing so, many are encountering new challenges because production environments are being asked to support a different operating model — one defined by high-speed output, shorter runs, greater application diversity, and more complex, data-driven workflows.

The printing process itself is highly efficient, automated, and capable of handling greater volume and complexity. However, downstream processes, such as finishing, handling, and workflow integration must now support higher throughput, shorter runs, and more variable job requirements, often within workflows originally designed for different production patterns.

In many cases, finishing environments are being adapted to support these new demands, requiring greater integration, flexibility, and integration across the production floor. The result is a growing need for better alignment across production.

Inkjet has significantly increased the volume, speed, and diversity of work moving through production. As that volume scales, the interaction between printing and finishing becomes more critical, placing greater emphasis on how efficiently work flows from press to final output.

Print provider respondents clearly recognize this shift. Among survey respondents with production inkjet presses:

- **90%** say finishing capabilities are critical to realizing the full productivity benefits of inkjet
- **88%** believe future finishing investments will deliver greater returns than faster presses
- **83%** report that as inkjet speeds increase, finishing — not printing — can constrain throughput
- **77%** say finishing and workflow capabilities are increasingly influencing inkjet adoption decisions

These survey findings reflect a broader change in how production environments are evaluated. Finishing is no longer viewed as a downstream function, but a key factor in determining overall efficiency and performance.

At the same time, print buyer respondents reinforce the importance of finishing:

- **95%** say enhanced finishing improves the effectiveness of printed materials
- **88%** consider finishing capabilities extremely or very important when selecting a print provider
- **70%** expect demand for more complex or highly finished print products to increase over the next two to three years

As print applications become more targeted, personalized, and experience-driven, finishing plays an increasingly important role in delivering both functional and perceived value. The implication is clear: finishing is no longer a value-add but a central component of production performance and a key driver of customer choice.

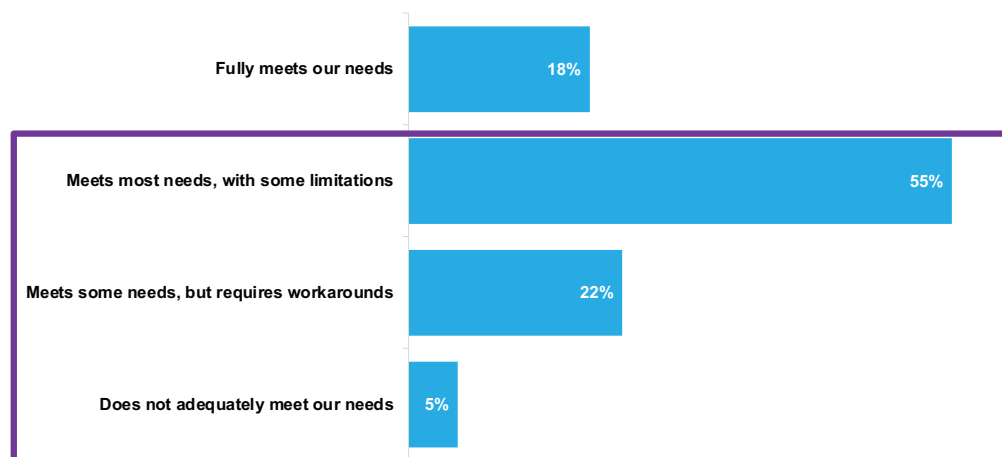
FINISHING WORKFLOWS MEETING NEEDS BUT WITH LIMITATIONS

While finishing is clearly recognized by respondents as critical to production inkjet success, most print providers indicate that their current workflows are not fully optimized to support it.

As shown in **Figure 2**, 18% of print providers report that their finishing workflows fully meet operational needs. The majority (55%) say their workflows meet most needs, but with limitations. Another 22% indicate that workarounds are required, introducing additional manual steps and inefficiencies, while 5% say their finishing workflows do not adequately meet their needs at all. Overall, 82% of print providers with production inkjet capabilities say current finishing workflow does not fully meet operational needs.

Figure 2: Finishing Not Fully Meeting Needs

Q. How well does your current finishing workflow meet the needs of your operation today?



82% say current finishing workflow not fully meeting needs

n=60 Print Providers with Production Inkjet Press(es)
Source: Finishing: Production Inkjet's Next Frontier, Alliance Insights 2026



This data suggests that while most operations are functional, they are not operating at peak efficiency. Many providers are able to complete work, but often with added complexity, intervention, or variability that can impact throughput and consistency.

When asked about the primary constraints affecting finishing performance, print providers point to a mix of operational and process-related challenges (**Figure 3**). Labor availability (43%) is the most frequently cited constraint, reflecting both workforce limitations and the labor-intensive nature of many finishing tasks. Job setup,

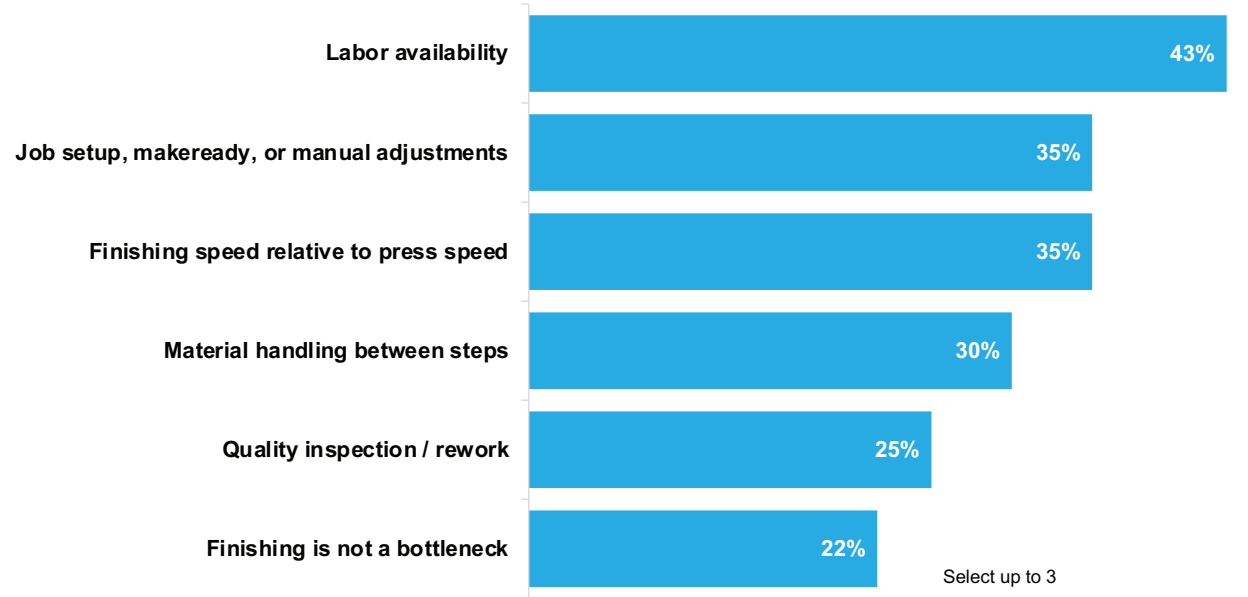
makeready, and manual adjustments (35%) also play a significant role, as frequent job changes and variability increase the need for intervention.

At the same time, finishing speed relative to press speed (35%) highlights the challenge of maintaining consistent flow through the production process, while material handling between steps (30%) introduces additional delays and complexity. Even quality inspection and rework (25%) contribute to inefficiencies that can impact overall throughput.

Notably, only 22% of providers report that finishing is not a bottleneck, reinforcing that for the majority of operations, finishing plays a meaningful role in shaping production performance.

Figure 3: Finishing Constraints Limiting Throughput

Q. What are the top THREE constraints within finishing that most often limit production inkjet throughput today?



n=60 Print Providers with Production Inkjet Press(es)
Source: Finishing: Production Inkjet's Next Frontier, Alliance Insights 2026



Taken together, these findings highlight an important reality: finishing environments are generally capable but often operate with constraints that become more pronounced as production inkjet adoption scales.

These challenges point to a broader issue: many of the constraints in finishing are not isolated to individual processes but are tied to how workflows are structured and executed across the production environment. As a result, improving finishing performance is not just about adding capacity, it increasingly depends on reducing manual intervention, improving consistency, and better connecting print and finishing systems. This is where automation and workflow integration become critical.

AUTOMATION & CONNECTIVITY LIMITED

While automation is widely recognized as a path to improving finishing performance, most print provider respondents have yet to fully connect print and finishing workflows.

Despite highly automated production inkjet presses, print provider respondents with production inkjet report finishing operations that are either partially automated or, in many cases, not fully integrated into the broader

production workflow. As a result, many of the inefficiencies respondents identified — manual intervention, variability, and delays — persist even in otherwise advanced production environments. Across key integration points between print and finishing, many print provider respondents with production inkjet report limited or no automation:

- **63%** say finishing setup is not fully triggered by job data
- **60%** report incomplete automation in the handoff between print and finishing
- **57%** lack full automation in sending job ticket data to finishing
- **53%** do not have fully automated job tracking, metrics, or reporting
- **49%** report limited automation in feeding production status back into workflow systems

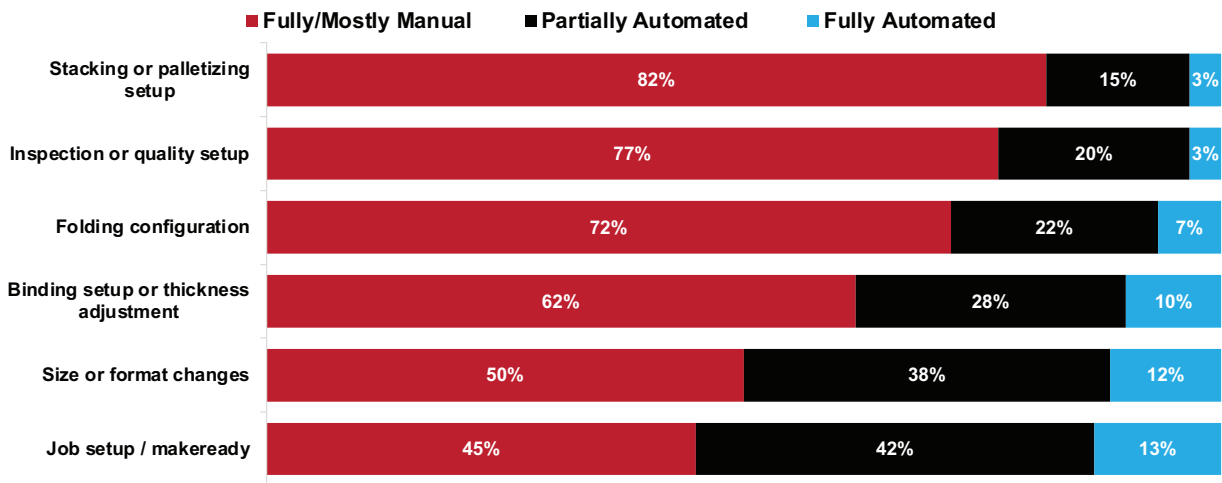
This indicates that while data may exist within the workflow, it is not consistently driving downstream processes. Manual touchpoints remain common, requiring operators to interpret job requirements, configure equipment, and manage transitions between steps.

One of the most significant gaps reported by respondents is the lack of closed-loop visibility. Only **13%** of print providers with production inkjet report fully automated feedback from finishing systems back into workflow platforms. Without this feedback, it becomes difficult to track performance in real time, identify bottlenecks, or continuously optimize production.

Finishing operations remain largely manual (**Figure 4**), with most providers reporting that key tasks — including stacking, inspection, folding, and binding setup — are still fully or mostly manual (62% to 82%). Fully automated processes are limited across all categories, ranging from just **3% to 13%** of operations.

Figure 4: Opportunity to Automate

Q. How automated are the following activities in finishing operations supporting production inkjet?



n=60 Print Providers with Production Inkjet Press(es)
Source: Finishing: Production Inkjet’s Next Frontier, Alliance Insights 2026



This imbalance highlights a key challenge: automation gains at the press are not consistently extending into finishing.

When asked what factors limit greater adoption of finishing automation, respondents with production inkjet reported the following:

- **83%** cite capital cost as a limitation
- **71%** identify integration complexity as a significant barrier
- **62%** point to uncertainty around return on investment
- **53%** cite available floor space constraints
- Only **32%** report workforce resistance or change management as a major limitation

These findings suggest that the challenge is not simply adopting automation technologies, but effectively integrating them into existing production environments.

As inkjet adoption continues, the ability to connect print and finishing workflows, reducing manual intervention and enabling data-driven production, will play an increasingly important role in improving efficiency, consistency, and overall performance.

Automation Requires Integration, Not Just Equipment

The findings make one point clear: improving finishing performance is not simply a matter of adding more automation, it is about how that automation is implemented and connected across the production workflow.

Many print providers have already invested in automation at the device level. However, without seamless integration between print, workflow, and finishing systems, those investments deliver only partial value. Manual handoffs, disconnected data, and limited visibility continue to introduce inefficiencies that offset potential productivity gains.

As a result, the opportunity is not just to automate individual processes, but to enable a more connected production environment.

This includes:

- Reducing manual intervention by allowing job data to drive finishing setup
- Improving workflow visibility through real-time production tracking and feedback
- Connecting systems across vendors and processes to create a more continuous flow of work

The lack of closed-loop integration is particularly significant. Without feedback from finishing systems, providers have limited insight into actual performance, making it difficult to identify bottlenecks, measure efficiency, or continuously improve operations.

As production inkjet volumes grow, these gaps become more pronounced.

The ability to coordinate, connect, and optimize the entire workflow — from print to finishing — will increasingly determine how effectively providers can scale production, maintain quality, and meet customer expectations.

In this context, automation is not just about replacing manual tasks. It is about enabling a more intelligent, responsive, and efficient production system.

INVESTMENT IS SHIFTING TO WORKFLOW INTEGRATION

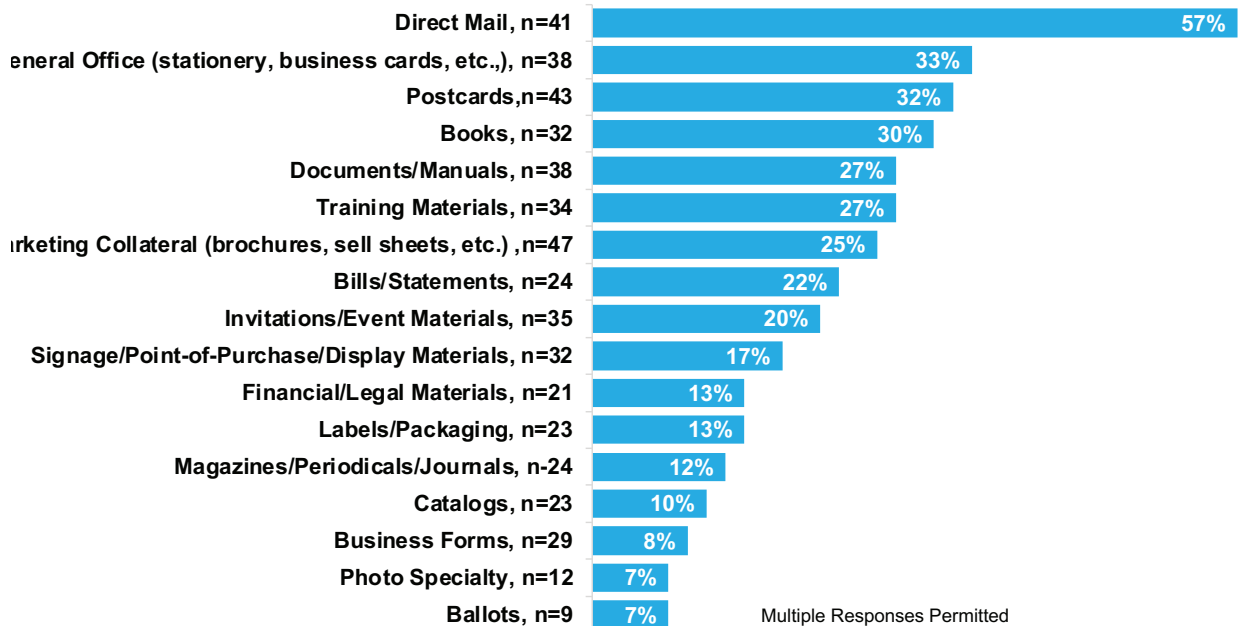
As production inkjet adoption accelerates and finishing requirements become more complex, print providers are re-evaluating where to prioritize investment. The focus is no longer solely on adding capacity, it is increasingly about improving how work is managed, coordinated, and executed across the production environment.

Rather than concentrating exclusively on finishing equipment, print providers are placing greater emphasis on workflow integration and software to better connect systems and manage production complexity. Workflow integration has emerged as a critical enabler of efficiency, particularly in environments handling high job volumes and a wide range of applications.

As shown in **Figure 5**, production inkjet is used across a diverse mix of applications — from direct mail and books to transactional and marketing work — each with distinct finishing requirements, production speeds, and workflow demands. This diversity increases operational complexity, making it more difficult to rely on standardized workflows and increasing the need for greater coordination across the production environment.

Figure 5: Application diversity drives Finishing investment

Q. Of the applications your organization prints, which ones are printed on production inkjet presses?



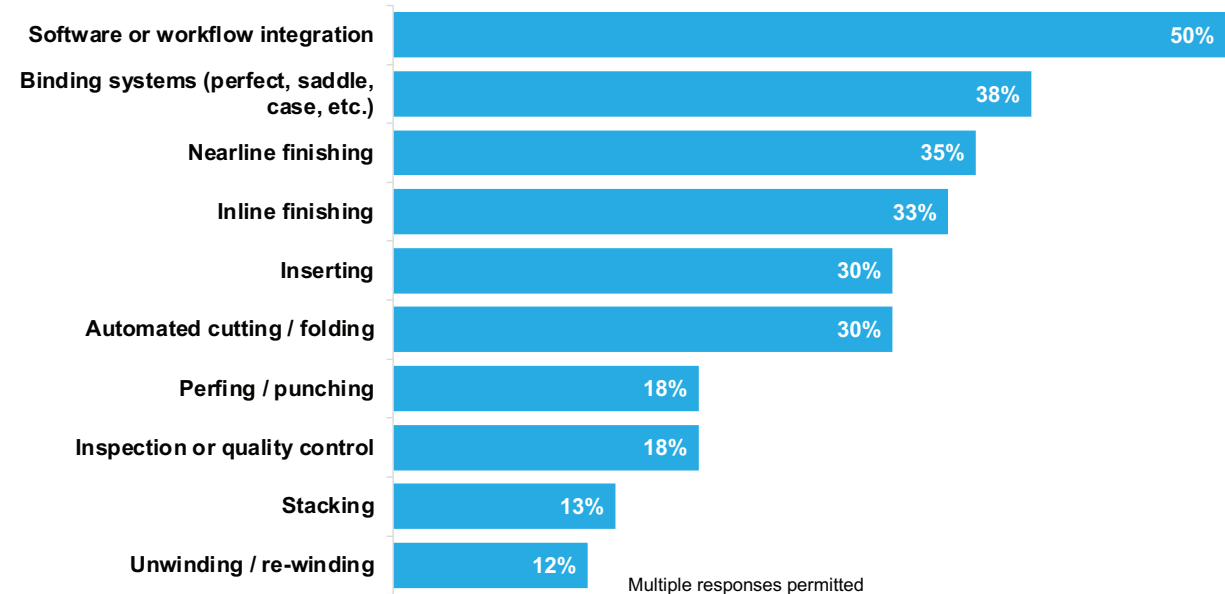
n=60 Print Providers with Production Inkjet Press(es)
Source: Finishing: Production Inkjet's Next Frontier, Alliance Insights 2026



This complexity is reflected in investment priorities shown in **Figure 6**. The prominence of workflow and software investment, ranking highest among all categories, highlights a key recognition. Managing how different types of work move efficiently through production and finishing is key to productivity.

Figure 6: Bindery and Finishing Investments

Q. Which bindery or finishing areas will your organization most likely invest in to support production inkjet?



n=60 Print Providers with Production Inkjet Press(es)
Source: Finishing: Production Inkjet’s Next Frontier, Alliance Insights 2026



As a result, print providers are building more flexible production environments, often combining multiple finishing approaches. These environments require greater coordination to ensure efficiency and consistency across different job types and production paths.

Investment decisions are also influenced by operational realities, including job volume, available finishing capacity, and application complexity. These factors often drive the need to balance speed with flexibility.

Taken together, these trends point to a broader transformation. Success in production inkjet is no longer defined by the performance of individual devices. It depends on how effectively the entire workflow is designed — from print through finishing — to manage volume, variability, and customer requirements.

As print providers invest in workflow integration and finishing capabilities to manage increasing complexity, these decisions are not being made in isolation. They are being driven, in large part, by evolving customer expectations. As print applications become more targeted, personalized, and time-sensitive, communication buyers are placing greater emphasis on finishing quality, flexibility, and the ability to deliver more sophisticated printed products. This shift is reinforcing the importance of finishing, not only as an operational requirement, but as a key factor in how print providers compete and differentiate in the market.

CUSTOMERS INCREASINGLY VALUE FINISHING CAPABILITIES

As print providers adapt their operations to support production inkjet, customer expectations are evolving in parallel. Communication buyers are placing greater emphasis on finishing, not just as a functional requirement, but as a key driver of effectiveness, impact, and value.

Finishing plays a central role in how printed materials are perceived and how they perform. From binding and folding to embellishments and personalization, finishing transforms printed output into a completed product that meets both practical and experiential needs.

Communication buyers report the following

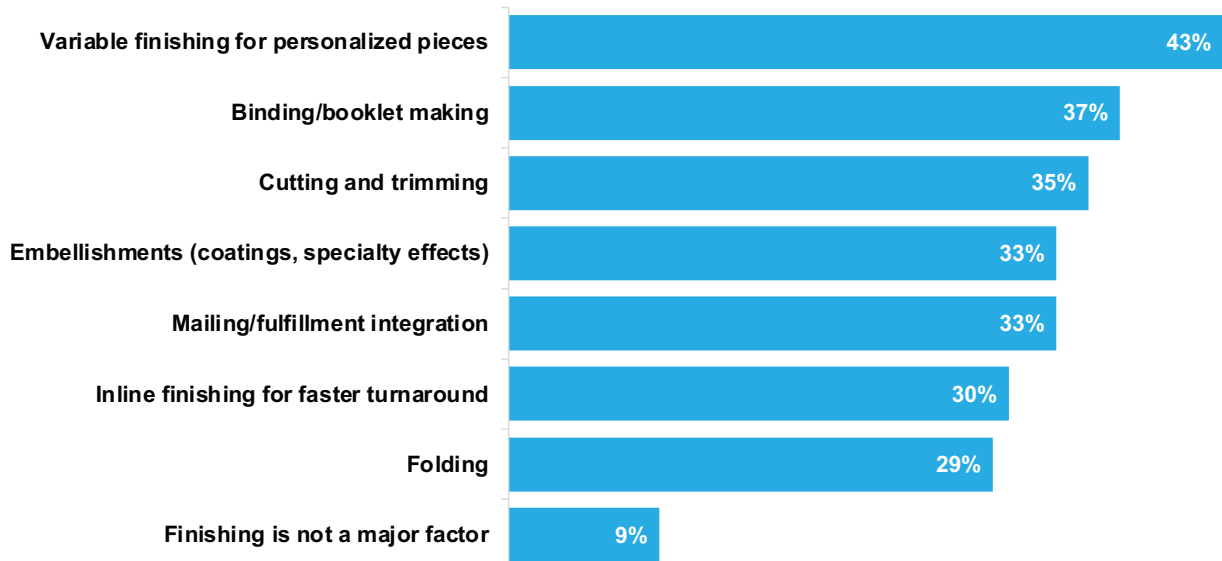
- **95%** say enhanced finishing (e.g., binding, folding, embellishments) increases the effectiveness of printed materials
- **88%** consider finishing capabilities extremely or very important when selecting a print service provider
- **70%** expect demand for more complex or highly finished print products to increase over the next 2 to 3 years

This growing demand is particularly evident among younger decision-makers, who are more likely to expect increased use of complex and highly finished print. As print becomes more targeted and experience-driven, finishing plays a larger role in differentiating output and driving engagement.

When asked which finishing capabilities matter most, communication buyers highlight a mix of functional and value-added requirements (**Figure 7**).

Figure 7: Finishing Capabilities that Are Important to Customers

Q. Which finishing capabilities are most important to your organization's print applications?



n=207 Communication Buyers and Influencers
Source: Finishing: Production Inkjet's Next Frontier, Alliance Insights 2026



Notably, only **9%** of respondents say finishing is not a major factor, reinforcing that finishing is now a mainstream expectation rather than a niche consideration.

At the same time, customers continue to experience challenges related to finishing performance:

- **31%** report inconsistent finishing quality
- **30%** cite requested rework
- **27%** identify turnaround time as a concern
- **27%** point to limited finishing options

These challenges highlight the direct connection between finishing operations and customer experience. What happens in finishing shows up in the final product and the customer notices.

Finishing is no longer simply part of the production process. It is a key factor in determining print effectiveness, influencing provider selection, and shaping customer expectations for what print can deliver.

FINAL THOUGHTS: PERFORMANCE IS DEFINED AFTER THE PRESS

Production inkjet has fundamentally reshaped print, delivering the speed, efficiency, and flexibility needed to support today's applications and customer demands. Print providers have successfully adopted these technologies, expanded capabilities, and shifted increasing volumes onto inkjet platforms.

But as this transition has progressed, a new reality has emerged. The limiting factor in production is no longer at the point of printing. It is in how effectively work moves through the rest of the operation.

Across the survey data, a consistent pattern is clear. Finishing workflows are meeting most needs, but often with limitations. Manual processes, integration gaps, and workflow inefficiencies persist, even in environments with advanced print technology. At the same time, investment priorities are shifting toward workflow integration, as providers recognize the need to better connect systems and manage increasing complexity.

Customer expectations are reinforcing this shift. Buyers are placing greater value on finishing capabilities, expecting more complex, highly finished products, and evaluating providers based not just on print quality, but on the ability to deliver complete, high-impact output.

Taken together, these trends point to a broader transformation in production inkjet. Performance is no longer defined by the speed of the device, but by the efficiency, coordination, and integration of the entire production process. This creates both a challenge and an opportunity.

Closing this gap requires a shift in focus: prioritizing finishing throughput alongside press speed, eliminating manual bottlenecks, investing in workflow-to-finishing integration, and building flexible, hybrid finishing environments aligned to application demands.

Print providers that continue to focus primarily on print capacity risk underutilizing their inkjet investments. Those that focus on improving workflow alignment — connecting print and finishing, reducing manual intervention, and enabling more efficient production flow — are better positioned to increase throughput, improve consistency, and meet evolving customer demands.

The implication is clear: The future of production inkjet will not be determined by how fast providers can print. It will be determined by how effectively they can finish, connect, and deliver.

