

Digital textile



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PROFILING RUSSIA'S POTENTIAL

Mikhail Shpilkin outlines the current state of the Russian digital textile printing market, elucidating on key players and growth areas

My congratulations to France on winning the World Cup! With World Cup matches having taken place in Sochi, I have seen Russia's streets, stadiums and people all adorned with digitally-printed fabric. But who is manufacturing all of these products? And, what equipment do they use?

Equipment providers

This article covers only industrial printing systems; printers with a print width less than 1.8m and a production speed less than 100 sqm/h are omitted from the analysis. We are also excluding systems that have been inoperable for a long time with a low probability of being put back into operation. After careful consideration however, the decision was made to include industrial printers by Durst, Konica Minolta and d.gen that were manufactured more than five years ago. While their printing speed is less than 100 sqm/h, they were considered high-performance systems when they entered the market and a number of them are still in use today.

With these parameters in place, at the time of writing, there are less than 50 industrial printers in operation in Russia. The market leader in Russia, with a high market share is MS Printing Solutions, part of Dover Digital Printing. Durst also has a significant market share, with EFI Reggiani and Konica Minolta the subsequent most prominent OEMs. Chinese manufacturers are also starting to gain some presence in the Russian market and d.gen now has some installations.

All systems incorporated in the market shares above were put into operation from 2010 onwards, with nearly half of the total number of installations being launched in 2017 and 2018. This, among other factors, shows that the number of installations of digital textile printing machinery is growing rapidly in Russia.

If we expanded the analysed area to encompass not only Russia but the countries in the former USSR, the total number of active printers would be nearly twice as high. Arguably the most interesting country in the region is Uzbekistan, where cotton is traditionally cultivated and cotton mills, built during the Soviet era, are concentrated. Uzbekistan has installed and begun production on the country's first single-pass printer.

All of this being said, a number of printers have also been installed that are no longer in use, including some models that were installed to print products for the 2014 Winter Olympic Games in Sochi.



Manufacture of products for the World Cup in the company Simvol from Kropotkin

Russian representatives

There are a number of representatives in Russia providing printers from leading OEMs. With the biggest market share, the local agent for MS Printing Solutions in Russia is a company called Textile and Technology. The company boasts the highest equipment sales volumes and the widest after-sales service network in the country providing support both for printing systems and for auxiliary textile treatment equipment. The same company is also the local representative for Monti Antonio in Russia.

SignArt, based in Saint Petersburg, is the exclusive representative of Durst in Russia offering industrial wide-format UV printers and textile printing systems.

For decades, Reggiani printers have been distributed in Russia by the company's Moscow-based office, however it is likely that the company will seek a local Russian representative, though this has not yet been confirmed. EFI's wide-format business in Russia has been long represented by Prizmix. Currently, the Russian distributor offers models from a

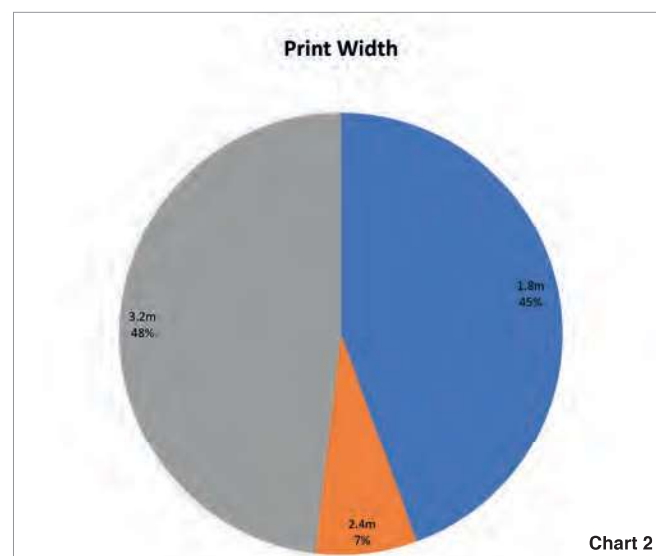
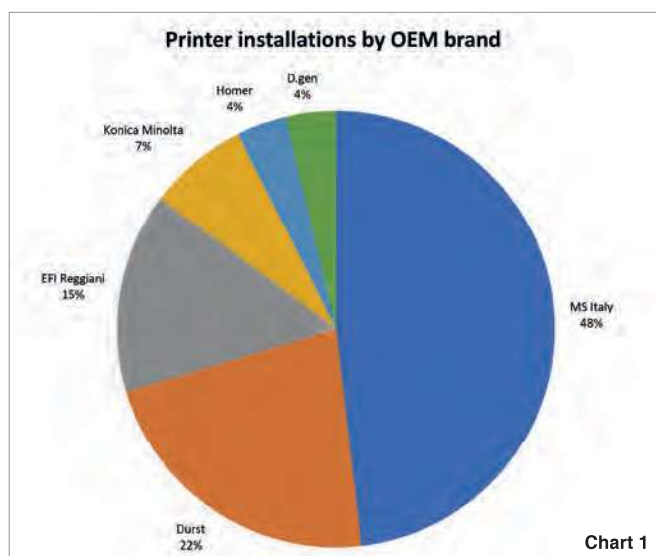
new product range added after the takeover of Reggiani and designed for advertising textile printing. The company plans to announce its first local installations this autumn.

A fifth distributor is the exclusive representative of Konica Minolta textile printers in Russia. The company offers almost a complete range of Konica Minolta's systems and has its own print shop, named Blueberry Print, equipped with two printers. Blueberry Print opened five years ago and is the first print shop in Moscow offering digital textile printing on natural fabrics.

Elsewhere, d.gen and Aleph are represented by NISSA StensArt in Russia. The last installation of large-format d.gen printers was in 2013 when two Grande printers were delivered. However, smaller d.gen printers are also selling in Russia.

In autumn 2017, NISSA and Aleph exhibited the LaForte printer at an industry exhibition and, in spring 2018, NISSA then showed an industrial T-shirt printing system by Aeoon at a Moscow trade show, becoming the manufacturer's exclusive partner.



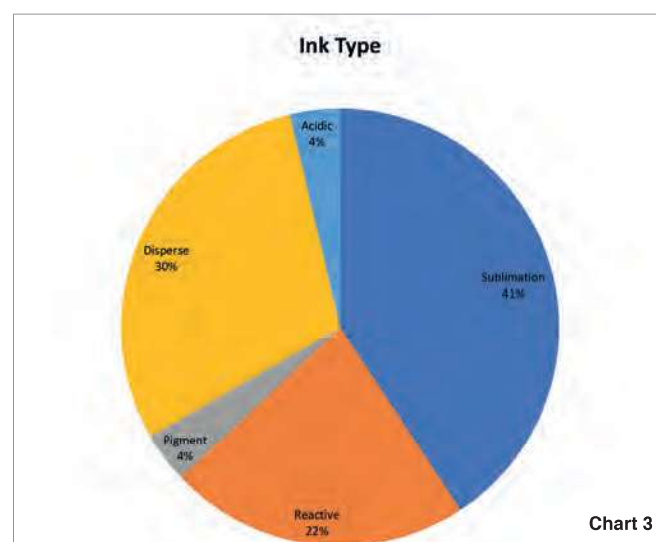


Before FESPA 2018, Chinese printer brand Homer announced that Kovcheg Group has become its exclusive Russian partner for wide-format textile printing equipment. According to Kovcheg, a Homer printer will be installed in its showroom by the end of this year.

Mimaki has yet to enter the Russian textile market, however its partner SMART-T, its largest Russian partner for other machinery types, is now also the exclusive representative for the Mimaki Tiger printers.

Meanwhile, the representative office of Epson in Russia currently has no rights to promote and offer the Monna Lisa printer, as Russia is still waiting for its turn, however this will likely change in the future.

ATD, the Russian representative of Kornit Digital, Israel, is demonstrating impressive results in promoting Kornit T-shirt printing machines, from basic models to high-grade industrial systems. There are multiple Kornit T-shirt printers working in Russia, but no installations of the Allegro roll-to-roll printer as of yet.



Print houses in business

At the moment, the vast majority of digital textile printing businesses in Russia have invested in equipment to complete their in-house production workflow; they make profit not through offering printing services but by selling ready-made printed products. Still, some of them offer printing services, preferably for larger batches, and this is also true for soft signage market players, with a number of Durst printers, MS printers and d.gen systems being used in this area.

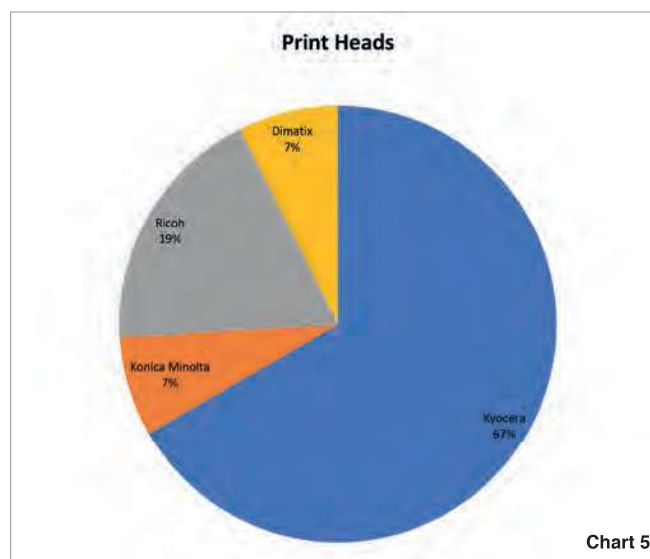
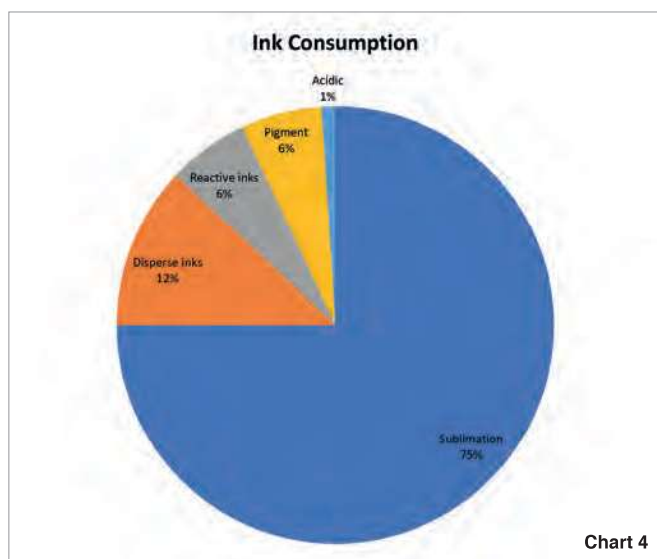
However, there are at least five companies that position themselves as textile print service providers (PSPs). Three of them work with non-synthetic fabrics and two specialise in sublimation printing.

For companies installing printing systems for in-house use,



business areas differ greatly. Without getting into too much detail, the main product types are bed linen, home textiles, curtain production, accessories (scarves made of natural fabrics), synthetic materials, sportswear, upholstery fabric, and childrenswear garment printing.

Foreign companies are also beginning to open production sites in Russia, albeit quite hesitantly. At present, there are



only two of them; a Turkish company and a business from the United Arab Emirates. Still, they own 7.5% of the total number of printers installed in Russia.

Market stats

The print width diagram - **see p. 33, chart 2** - shows the market segmentation based on the print width. It is worth noting that almost 70% of printers with a width of 3.2m are in the soft signage industry.

The ink type diagram - **see p. 33, chart 3** - portrays market segmentation in the sector, while the ink consumption diagram (see above) illustrates sublimation's dominance in Russian.

I'd like to underline that the estimates are a rough guide and include the whole roll-to-roll fabric printing industry in Russia, with printer types not covered in this article (including hundreds of small roll-to-roll textile printers by Epson, Mimaki, Mutoh, Roland and other manufacturers).

Meanwhile, the print head types diagram (see above) highlights Kyocera's popularity in Russia.

Market trends

As the market of industrial systems is still shaping up in Russia, investments in reactive printing systems for natural fabrics have become a new trend with new installations of the MS JP7 and the Konica Minolta Pro8 for this purpose in the last year.

The sublimation printing market is also growing steadily due to hardware investments not being so demanding.

Whilst the Russian market for digital textile printing is in its infancy, the machinery install base is increasing rapidly. However, the market is still far from saturation, and there is more than enough space for numerous print businesses to emerge.

Textile printing services are in high demand from customers, but the market is challenged by a very limited choice of companies ready to accept print orders.

The demand for pigment printing is best described as a potential. Still, it is a promising area that requires considerably less equipment and, consequently, a much simpler workflow. Russia has no regulatory framework yet – which outlines environmental requirements for print production, but this could further facilitate the demand for pigment printing long-term.



Red Square, Moscow