

## **Dye Sublimation Printing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 106 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The Dye Sublimation Printing Market size is estimated at USD 15.22 billion in 2025, and is expected to reach USD 25.52 billion by 2030, at a CAGR of 10.88% during the forecast period (2025-2030).

Dye sublimation, also referred to as digital sublimation, is a digital printing technology that employs heat transfer to embed high-quality images onto designated substrates. This process is widely adopted across industries for customizing and enhancing products such as apparel, signs, banners, and various other items with surfaces specifically designed to support sublimation printing.

#### Key Highlights

- Customization and personalization continue to be major drivers of the dye sublimation printing market. Consumers are increasingly seeking unique and personalized products, and dye sublimation printing is well-suited to meet this demand. This trend is particularly evident in fashion, interior decor, and promotional products. Companies like Roland DGA Corporation are focusing on developing printers that can produce high-quality customized products efficiently.
- The apparel market's growth is significantly driving the demand for dye sublimation printing globally. As consumers increasingly seek personalized and unique clothing items, dye sublimation printing emerges as a preferred technology due to its ability to produce high-quality, full-color prints on fabrics. This technology allows for the creation of customized apparel such as t-shirts, sportswear, and fashion accessories that reflect individual styles and preferences.
- The surge in marketing and advertising expenditures has significantly propelled the demand for dye sublimation printing. This printing technique, celebrated for its vibrant and durable outputs, has become a preferred choice for producing high-quality promotional materials, including banners, flags, and customized apparel. As businesses intensify their branding efforts to capture consumer attention, the need for visually striking and personalized marketing assets has escalated.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- The consumables used in dye sublimation printing, such as specialized inks, transfer papers, and substrates, are generally more expensive compared to those used in traditional printing methods. This increases the overall production cost, making it less competitive in terms of pricing, especially for large-scale production runs.

## Dye Sublimation Printing Market Trends

### Garments to be the Largest Application Segment

- Garments, including sportswear, swimwear, haute couture, and accessories like ties and scarves, have witnessed increased sales, leading to the dye sublimation printing demand. Within this segment, printers are predominantly employed for sportswear, driven by the high-quality printing details and the user-friendly printing process.
- In April 2024, Seiko Epson Corporation unveiled its SureColor F11070 dye sublimation printer, boasting four 4.7" PrecisionCore Thin Film Piezoelectric (TFP) printheads. The SureColor F11070H, equipped with six printheads, promises roll-to-roll performance speeds of 2,700 square feet per hour (sqft/hr) and 2,635 square feet per hour (sqft/hr), respectively. Both models leverage vibrant UltraChrome Dye Sublimation (DS) ink technology, ensuring top-notch quality for apparel.
- In conclusion, consumers worldwide increasingly view headwear, from headbands to beanies, as fashion statements rather than mere necessities. This shift in perception is poised to boost headwear sales, driving the market's demand during the forecast period. Furthermore, according to the US Census Bureau, retail sales for clothing and accessories stores in the United States reached USD 25.318 billion in October 2024, up from USD 15.918 billion in January 2022.
- Technical textiles prioritize function over aesthetics, serving a myriad of specialized purposes. These range from medical implants and automotive seat belts to agro textiles for crop protection. Other applications include geotextiles, protective clothing for firefighters and welders, and even accessories and sports equipment.
- In March 2024, Hybrid Services Limited, the exclusive distributor for Mimaki Engineering Co., Ltd. in the United Kingdom (UK) and Ireland, unveiled the Japanese manufacturer's dye sublimation printer at their Cheshire showroom. The Mimaki Tiger600-1800TS boasts impressive print speeds of up to 550 square meters per hour (m<sup>2</sup>/h), positioning it as a top choice for demanding large-scale textile projects.
- Recognizing the market's growth potential, companies like Jacquard Inkjet Fabric Systems, Inc. are forging collaborations within the value chain, further propelling the expansion of technical textiles.

### Asia Pacific to Register Major Growth

- India, Japan, Indonesia, China, and Thailand are driving a surge in revenue from printed clothing, propelling significant growth in the Asia-Pacific region. Additionally, China's and India's swift embrace of digital fabric printing is set to further amplify this market expansion.
- In India, Thailand, China, and Bangladesh, a surge in e-commerce sales of clothing and apparel is poised to fuel industry growth. Moreover, supportive government policies in India and China are actively promoting investments in fabric manufacturing and printing, further bolstering market expansion.
- In March 2025, Koala Paper, a frontrunner in digital printing media, unveiled its cutting-edge sublimation paper technology. This new range boasts an advanced formula, elevating colorfastness and setting a benchmark for durability in both digital and high-end textile printing.
- Seiko Epson Corporation notes that dye sublimation is the go-to method for printing on polyester fabrics, sportswear, and soft signage, thanks to its permanence and resistance to peeling or fading.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## Dye Sublimation Printing Industry Overview

Currently, the market is semi-consolidated, with several players, such as Seiko Epson Corporation, Roland DGA Corporation, Mimaki Engineering Co., Ltd., HP Development Company LP, etc., dominating the space.

These vendors hold prominent shares in various regional markets, specific to particular industries, and are constantly innovating and launching new products to gain market share. For instance, Seiko Epson Corporation introduced new industrial SureColor F-Series dye sublimation printers in April 2024 to increase production efficiency. The competition is further intensified by the growing demand for customized products and the need to stay ahead in technology and innovation.

The competitive strategy among the vendors is to gain a foothold in the market with innovation. The ability to invest in R&D by significant vendors is on the higher side, thus, intensifying the competition in the market.

Access to the distribution channel, already present business relations, and better supply chain knowledge, along with the self-owned platform, give the established tech giants the market advantage over the new competitors.

Overall, the competitive rivalry is expected to be high and remain the same during the forecast period.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

### **Table of Contents:**

#### 1 INTRODUCTION

##### 1.1 Study Assumptions and Market Definition

##### 1.2 Scope of the Study

#### 2 RESEARCH METHODOLOGY

#### 3 EXECUTIVE SUMMARY

#### 4 MARKET INSIGHTS

##### 4.1 Market Overview

##### 4.2 Industry Value Chain Analysis

##### 4.3 Industry Attractiveness - Porter's Five Forces Analysis

###### 4.3.1 Bargaining Power of Suppliers

###### 4.3.2 Bargaining Power of Consumers

###### 4.3.3 Threat of New Entrants

###### 4.3.4 Threat of Substitutes

###### 4.3.5 Intensity of Competitive Rivalry

##### 4.4 Technology Snapshot

##### 4.5 Assessment of Impact of Geopolitical Scenario on the Industry

#### 5 MARKET DYNAMICS

##### 5.1 Market Drivers

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.1.1 The Growing Apparel Market
- 5.1.2 Increase in Marketing and Advertisement Spending
- 5.2 Market Restraint
- 5.2.1 Capital Expenditure and Consumption Cost

## 6 MARKET SEGMENTATION

- 6.1 By Application
  - 6.1.1 Garments
  - 6.1.2 Technical Textiles
  - 6.1.3 Household
  - 6.1.4 Visual Communication
  - 6.1.5 Rigids
- 6.2 By Geography\*\*\*
  - 6.2.1 North America
  - 6.2.2 Europe
  - 6.2.3 Asia
  - 6.2.4 Australia and New Zealand
  - 6.2.5 Latin America
  - 6.2.6 Middle East and Africa

## 7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
  - 7.1.1 Seiko Epson Corporation
  - 7.1.2 Roland DGA Corporation (Roland DG Corporation)
  - 7.1.3 Fujifilm Holdings Corporation
  - 7.1.4 Canon Inc.
  - 7.1.5 Mitsubishi Electric Corporation
  - 7.1.6 Colorjet Group
  - 7.1.7 Sawgrass Technologies Inc.
  - 7.1.8 HP Development Company, L.P. (HP Inc.)
  - 7.1.9 Gandy Digital Ltd
  - 7.1.10 Klieverik Heli BV
  - 7.1.11 Mutoh Europe NV
  - 7.1.12 Dai Nippon Printing Co. Ltd

## 8 INVESTMENT ANALYSIS

## 9 FUTURE OF THE MARKET

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Dye Sublimation Printing - Market Share Analysis, Industry Trends & Statistics,  
Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 106 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-04"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

[www.scotts-international.com](http://www.scotts-international.com)