



**PRINT
CENSUS**

FESPA

PRINT CENSUS 2026

Artificial
Intelligence

**Connect
Inspire
Support**

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Welcome

These FESPA market surveys began in 2007 and have continued to be published every 3 years. The project continues to evolve so that we can share an up-to-date view of market conditions as experienced by speciality printers. We have changed the frequency to once every six months, so that we can share relevant insights, more often, giving the industry a clearer view of where to focus next.

Our research and analysis focus on how businesses view the future, which opportunities they are adopting, what challenges they face, and how they are planning for growth and development. The latest reports offer insights to help printers make informed decisions to enable growth. The responses are collected with the support of FESPA's Association network and analysed in partnership with our long-term partner Keypoint Intelligence.

This census was completed by 774 businesses across 89 countries, including sign and display businesses, screen printers, commercial printers, textile and garment printing specialists and packaging printers. We have focused on production automation, AI and sustainable management as these are areas of particular interest.

The Executive report is shared with everyone who contributed to the project. The three detailed reports are available to all FESPA members through our member network and to FESPA Direct members.



The sustainability findings show that while most businesses recognise its importance, far fewer have translated intent into measurable results or meaningful customer value. Smaller firms in particular face indirect pressure from supply chains, even where regulation does not apply directly. The report highlights the need for stronger, evidence-based customer communication and practical preparation for rising procurement and reporting expectations.

Automation is widely seen as necessary to protect margin, speed and consistency, yet many smaller businesses delay implementation due to time or budget constraints. Without even basic workflow automation, firms risk falling behind as labour shortages and digital-first ordering increase. The AI report shows that adoption is growing but uneven, with many unsure where to begin. It identifies low-barrier starting points while addressing concerns around data security, reliability and skills development.

Use the reports to benchmark your own priorities, sense-check investment decisions, and spot where capability gaps are likely to create risk or opportunities over the next 6–12 months.

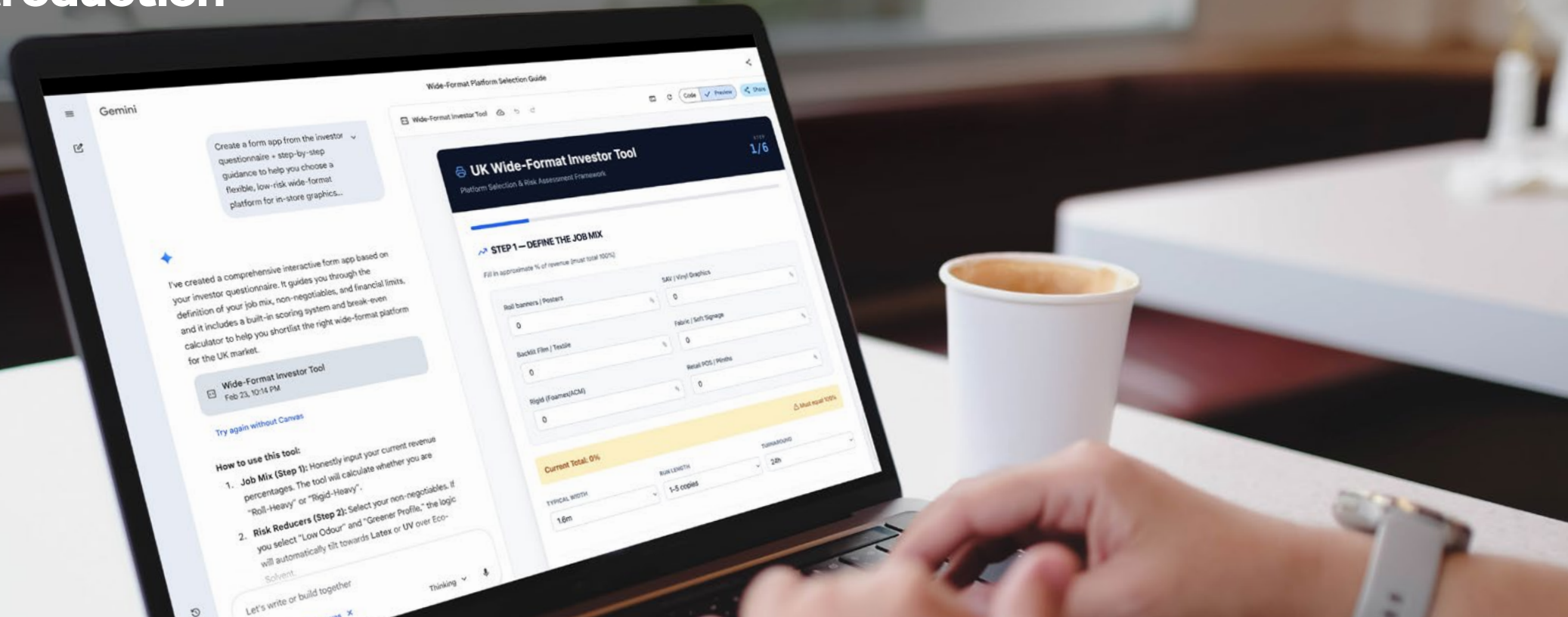
We hope that this initiative brings you useful insight.

Graeme Richardson-Locke

Head of Associations and Technical Lead



Introduction



The FESPA Print Census on Artificial Intelligence (AI), conducted from May to September 2025, offers insight into the strategic importance of AI for the global print industry. This importance stems from increasing cost pressures, labour shortages, evolving customer expectations, regulatory demands, and sustainability targets. The dataset includes responses from 774 industry stakeholders—print service providers (PSPs), equipment dealers/distributors, and manufacturers—capturing viewpoints across the print value chain. The study explores key business characteristics, customer types, service offerings, and new opportunities for AI.

With PSPs accounting for 66% of all responses, the survey highlights perspectives from firms that are typically reactive to customer demand. In contrast, suppliers such as dealers and manufacturers often drive innovation and influence market direction. Dealers/distributors (19%) and manufacturers (15%) provide upstream perspectives, leveraging economies of scale, R&D investments, and earlier access to emerging technologies.

This report analyses responses by business type to deliver a detailed perspective on AI readiness, perception, and use across the

industry. It identifies key AI trends, practical communication needs, strategic risks, and emerging opportunities for stakeholders. Separate sections are provided for 511 PSPs and 263 dealers/distributors and manufacturers to support targeted interpretation. The findings serve as guidance for stakeholders aiming to sustain operational performance and competitiveness amid AI adoption. Some findings may underrepresent AI use due to respondents' uncertainty about what constitutes "AI." In particular, micro-businesses, many of which lack formal IT or data roles, may struggle to distinguish AI from general automation.

Key Highlights

1

SMALL BUSINESSES DOMINATE THE INDUSTRY

75% of respondents have fewer than 50 employees. The median revenue is USD 625,000, suggesting limited resources for transformative sustainability investment among most companies. This SME-heavy demographic informs both the reported challenges and slower pace of sustainable innovation.

2

OVER 50% OF RESPONDENTS SERVE THE WIDE FORMAT SIGNAGE AND GRAPHICS SECTOR, WITH NEARLY 40% SUPPORTING DIGITAL TEXTILE PRINTING

These segments face complex design and production workflows (such as colour matching, proofing, and file prep) which increases the potential value of AI in areas like generative imaging and job automation.

3

A LACK OF AI FAMILIARITY REMAINS WIDESPREAD AMONG PSPS, PARTICULARLY MICRO FIRMS

This highlights the need for educational support from associations and vendors. Clarifying tangible use cases (e.g., faster quoting, design generation, prepress checks) can bridge knowledge gaps.

4

WHILE AI ADOPTION IS RISING, NEARLY 40% OF PSPS REPORT NO CURRENT USAGE

This may reflect pre-adoption interest, lack of awareness, or hesitancy due to limited guidance or perceived risk.

5

ALTHOUGH NEARLY 25% OF DEALERS/DISTRIBUTORS AND MANUFACTURERS DO NOT YET USE AI, THEY APPEAR TO BE IMPLEMENTING IT MORE RAPIDLY THAN PSPS

This is likely due to internal technical capacity, competitive pressure, and access to R&D.

Research Findings

TOTAL RESPONDENTS

A total of 774 respondents participated in the 2025 survey. Nearly two-thirds were PSPs, while the rest were equipment dealers/distributors or manufacturers. The data are segmented by group to highlight differences in readiness, motivations, and adoption pathways. The survey covers 89 countries, providing a broad view of industry sentiment. However, this geographic dispersion may dilute region-specific insights, especially given differences in infrastructure, investment appetite, and local market pressures. A regional breakdown of AI adoption could better highlight these disparities.

Although this dataset does not isolate adoption by geography, qualitative feedback and external market observation suggest that uptake is typically fastest in regions where PSPs already rely on integrated MIS and cloud workflow infrastructure, and slowest where production remains predominantly manual or cash-constrained. This reinforces the risk that micro-businesses may assume AI is relevant only to larger competitors unless trade bodies and vendors provide simple, print-specific examples that demonstrate achievable entry-level wins.

Respondents reported serving a wide range of sectors. Over half support wide format signage and graphics, and nearly 40% serve digital textile printing—two segments with complex production needs that benefit from AI-enabled file handling, proofing, and generative image tools.

FIGURE 1 **PRIMARY BUSINESS TYPE**
What is your primary business type?

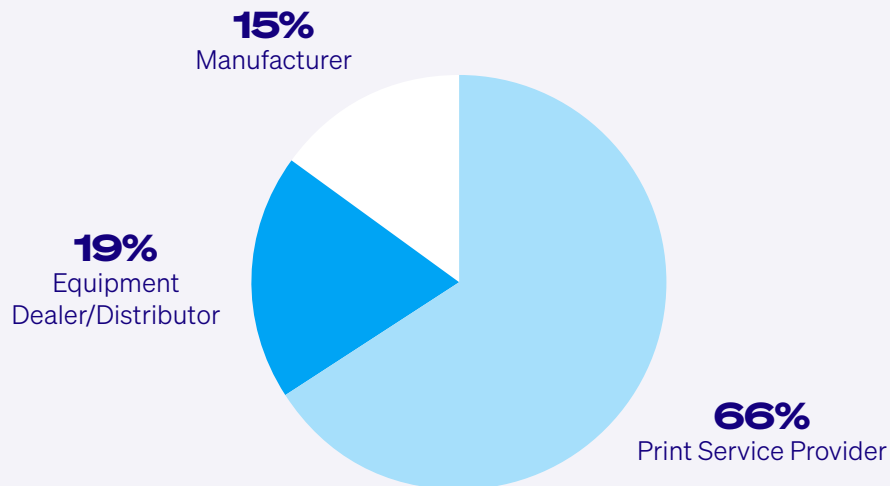


FIGURE 2 **INDUSTRIES SERVED**
Which of the following industry sectors does your company serve? (Multiple choice)

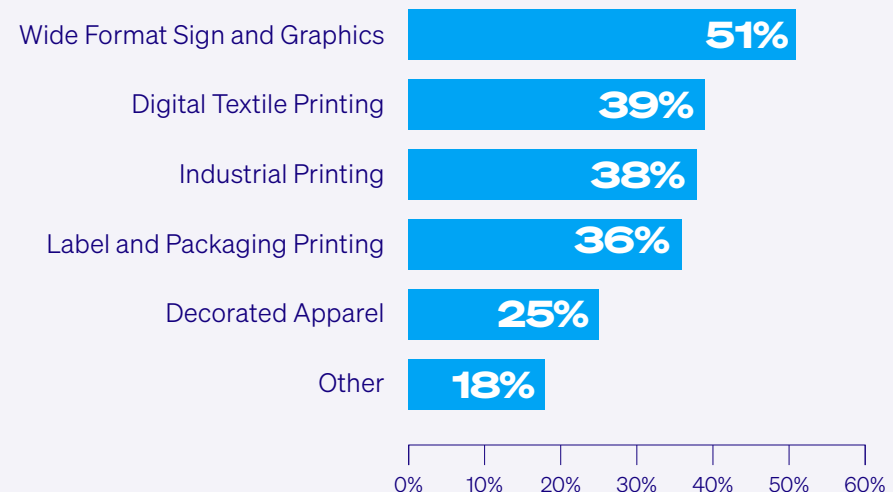
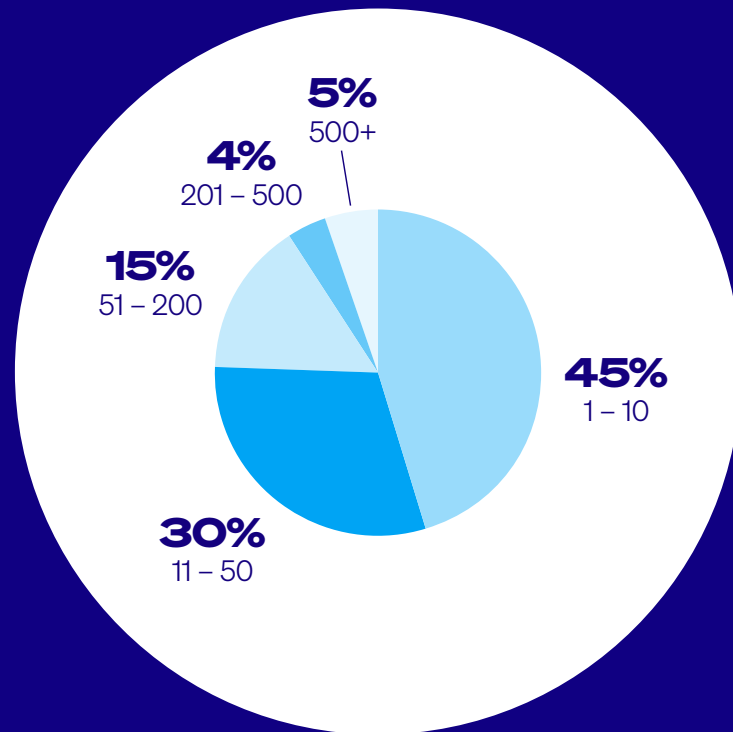
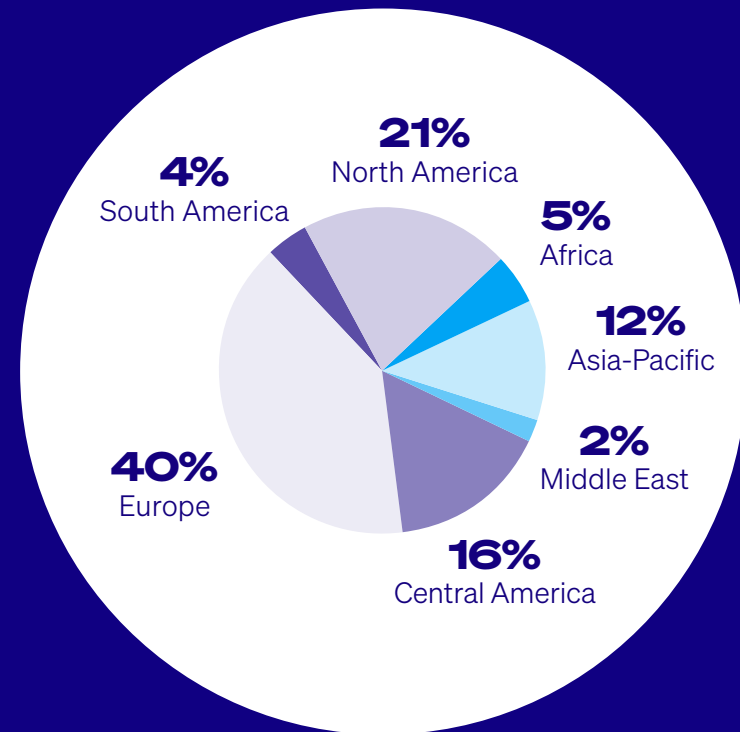


FIGURE 3 NUMBER OF EMPLOYEES
How many employees does your company have?



The average number of employees across all respondents was 77, though this is skewed by a small number of very large firms. Nearly half (45%) of all businesses had 10 or fewer employees, indicating a high proportion of micro-enterprises. These small firms often lack in-house IT or data specialists, which may limit their ability to evaluate or implement AI solutions. Many may not fully grasp AI terminology or understand what qualifies as AI, leading to under-reporting. Overall respondents had an average of 77 employees, but this mean was certainly drawn upward by the share of very large businesses in the mix.

FIGURE 4 BUSINESS LOCATION
Where is your company located?



Europe accounted for 40% of responses, followed by 37% from North or Central America. Responses spanned 89 countries. This global spread provides breadth but reduces the granularity of regional AI maturity insights, which would help identify where adoption is fastest or most delayed.

About 40% of total respondents were members of FESPA. Members are part of a global specialty print network that has access to relevant content and special perks around events and networking.

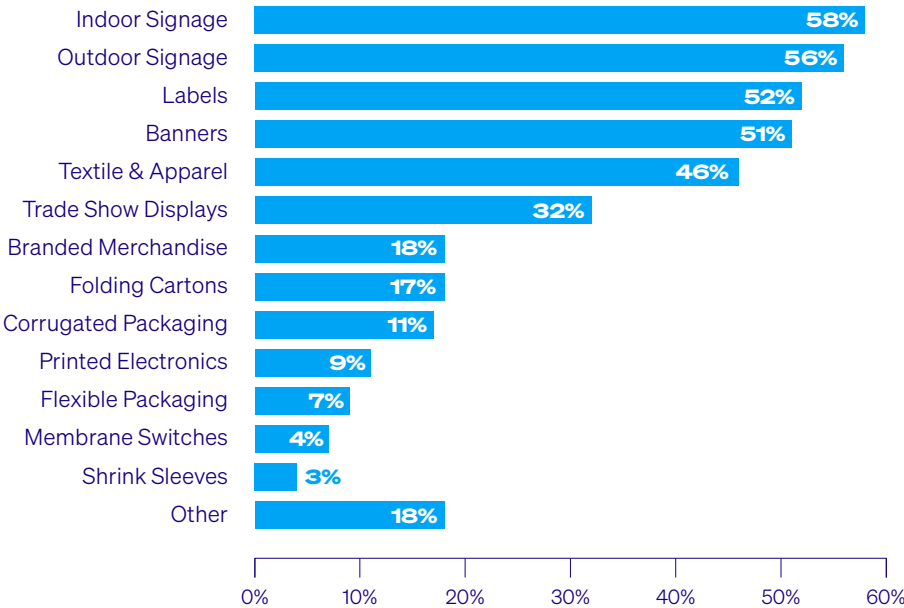
Print Service Providers

This section focuses on 511 respondents who identified as print service providers (PSPs), a group typically driven by customer demand rather than internal innovation strategies.

These PSPs reported a broad range of services. The most common included signage, labels, banners, and textiles/apparel; products that offer accessible entry points for AI-enabled workflow automation, such as batching and routing. However, the data does not highlight niche applications where AI could deliver early impact, such as textile sampling, mass customisation, or short-run personalisation. In practice, the fastest AI impact for PSPs is likely to emerge in short-run, high-variation niches such as mass customisation, textile sampling, and on-demand personalisation, where AI-driven artwork variation, automated nesting, and dynamic scheduling can materially reduce turnaround time and unit cost.

FIGURE 5 PRINTING SERVICES

Which of the following printing services does your company provide?
(Multiple choice)



AI has moved from theory to implementation, transforming workflows in multiple segments, including wide format printing. AI-assisted design tools emerged as the leading application, highlighting a preference for creative use cases such as instant artwork generation, mock-ups, and reduced design workload. Nearly 40% of PSPs report no current use of AI. This suggests either low awareness, confusion about what constitutes AI, or limited perceived need —indicating that many firms are still in a pre-adoption phase. Operational applications such as predictive maintenance, prepress optimisation, or demand forecasting trail behind, indicating a lag in awareness or accessibility for non-design AI tools.

FIGURE 6 AI APPLICATIONS IN USE

Which of the following AI applications are currently used in your business?
(Multiple choice)

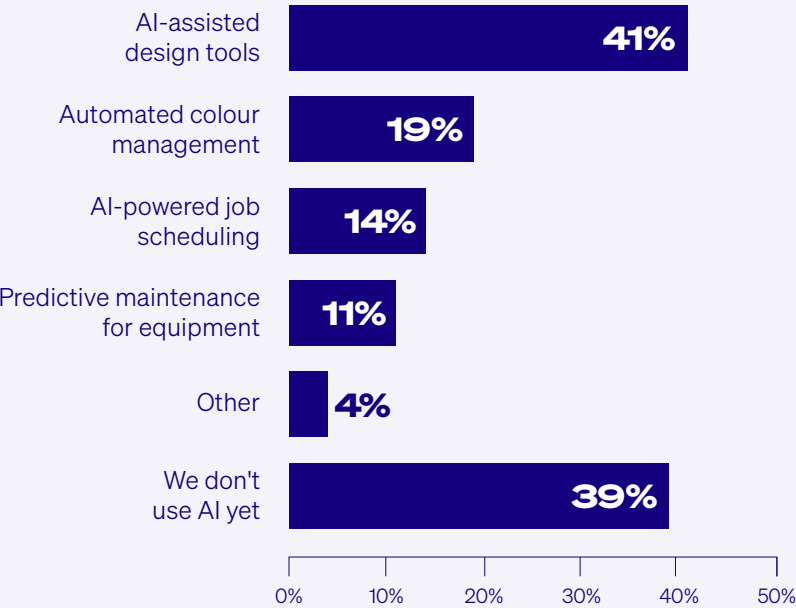
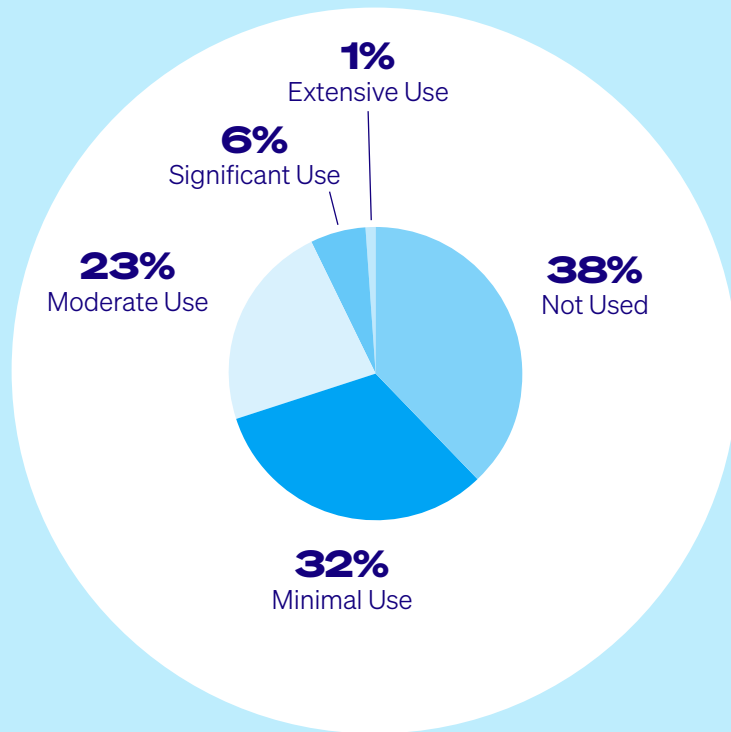


FIGURE 7 **USE OF AI-BASED AUTOMATION**

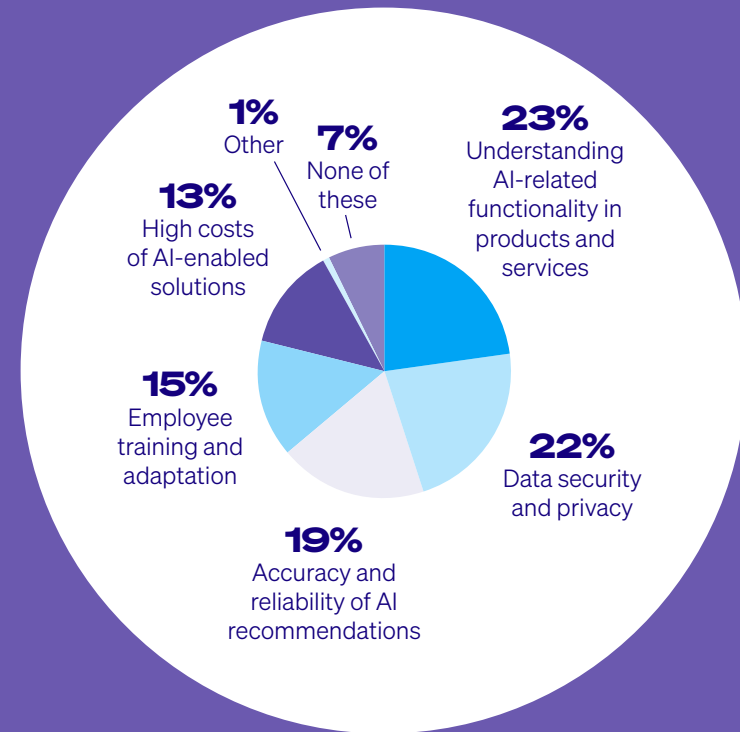
How would you describe the use of AI-based automation in your daily operations?



Automation, which sometimes incorporates AI, is not yet widespread. 38% of PSPs report no use, and most others describe minimal to moderate adoption. Some respondents may not realise that certain automation tools qualify as AI. This suggests that many PSPs still operate with manual workflows, increasing the risk of bottlenecks as volumes rise. Hesitancy may stem from fear of disruption or perceived process complexity. Starting with narrow, low-risk applications such as automated delivery notes, quote generation, or label creation could help overcome this reluctance.

FIGURE 8 **BIGGEST AI ADOPTION CONCERN**

What is your biggest concern regarding AI adoption?

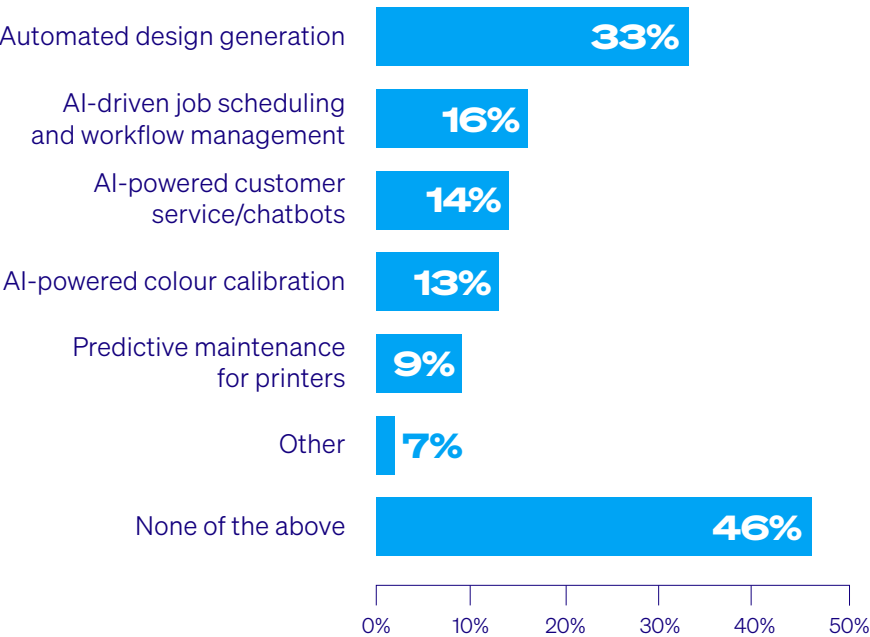


PSPs identified understanding AI-related functionality as their top concern, followed closely by data security and privacy. This reflects uncertainty about how AI is embedded in tools they already use. Examples of AI functionality that raise questions include automated preflight checks, layout optimisation, or predictive ink usage alerts. Security concerns may relate to cloud-based file handling, GDPR compliance, and data sovereignty. This also underscores the need for vendors and distributors to simplify how they communicate AI features to PSPs.

46% of PSPs have not yet integrated AI into their workflows. Among those that have, automated design generation leads, likely due to low barriers to entry and immediate visual results. However, this dominance suggests AI use is still fragmented and informal, often led by individual designers experimenting outside structured workflows. Many PSPs may lack the digital infrastructure or process maturity to fully embed AI, particularly in micro businesses focused on daily survival rather than long-term planning. However, PSPs should be cautious that generative imaging can produce visually convincing outputs that are not necessarily coherent for print production, colour-accurate, or legally licensable. Structured review checkpoints and print-feasibility validation remain essential before customer commitment.

FIGURE 9 **INTEGRATING AI IN WORKFLOW**

Which of the following AI-driven solutions have you integrated into your workflow? (Multiple choice)

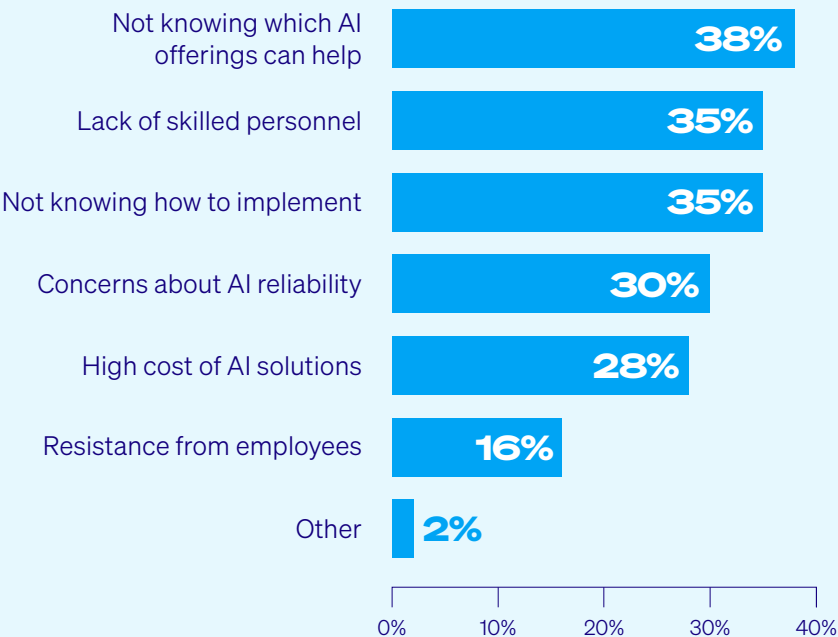


The most cited implementation challenges include a lack of clarity on what tools are available and how they can be applied in a PSP environment. This gap could be addressed with sector-specific education modules, showing clear use cases like automated nesting, imposition planning, or routing. The risk is that confusion delays adoption, even when affordable, low-complexity tools exist. A major opportunity lies in offering PSP-targeted training with simple, modular AI tools.



FIGURE 10 **CHALLENGES TO AI IMPLEMENTATION**

What are your biggest challenges in implementing AI within your business? (Multiple choice)



Dealers, Distributors, and Manufacturers



This section analyses responses from 263 participants classified as dealers, distributors, or manufacturers—upstream firms more likely to drive innovation and influence AI adoption trends. These upstream respondents most frequently cited intelligent automation for workflow management and customer service—areas where standardised processes allow for more seamless AI integration. While nearly 25% were not yet using AI, upstream firms are adopting at a faster pace than PSPs. This is likely due to better resourcing, established R&D frameworks, and pressure to maintain competitive product portfolios.

Nearly 30% of upstream respondents noted growing PSP demand for AI-integrated features. However, 42% reported slow adoption, and 29% indicated that AI remains a low priority for many PSPs. This disconnect may reflect that many PSPs are unsure what features to request. Vendors may need to lead by offering pre-configured, easy-to-use AI modules—focusing on simplicity, speed, and reduced error rates. Adoption will likely remain limited unless PSPs receive accessible, practical education about AI's operational benefits and time-to-value.

FIGURE 11 **INCORPORATING AI IN PRODUCTS/SERVICES**

How do you incorporate AI into your products or services? (Multiple choice)

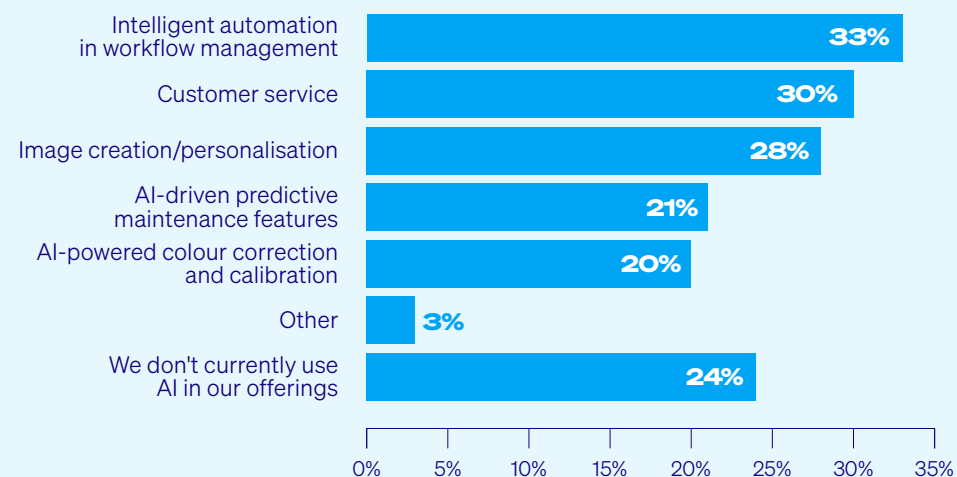
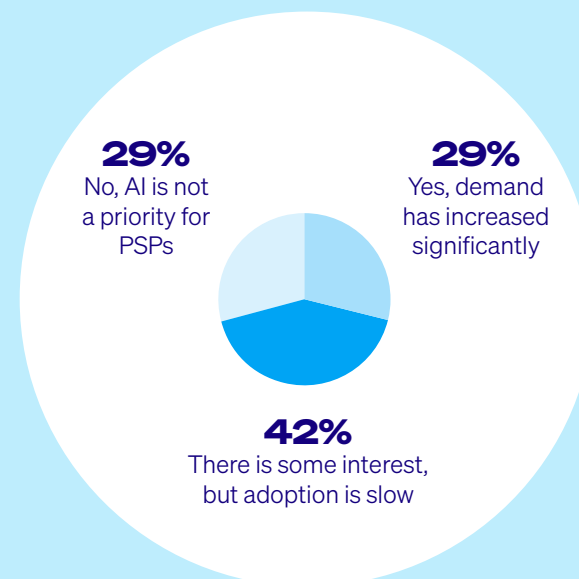


FIGURE 12 **REQUESTS FOR AI-INTEGRATED FEATURES**

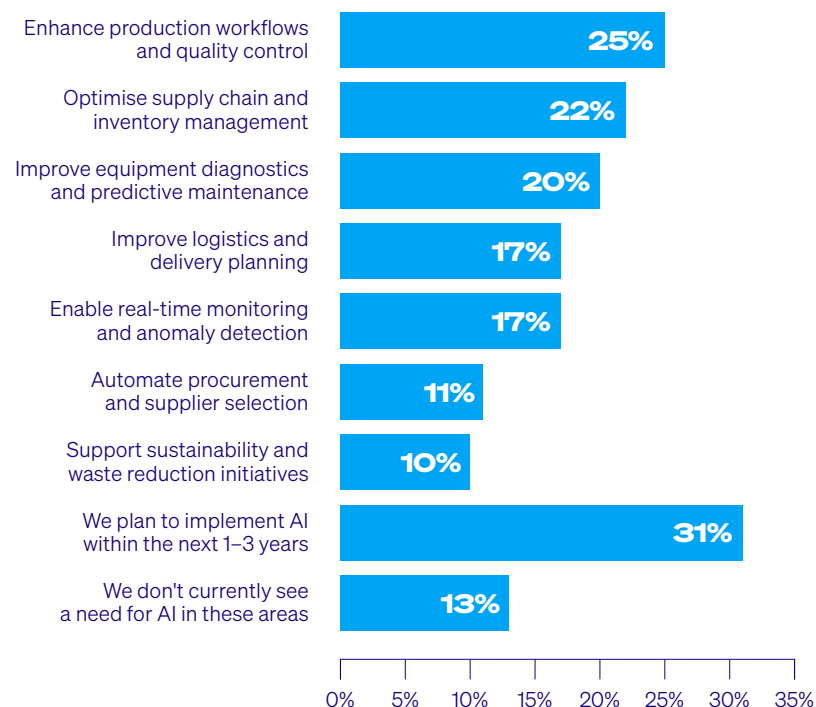
Are print service providers asking for AI-integrated features in equipment or software?



Most upstream firms are applying AI in operational areas such as quality control and production workflows; functions that are more predictable and data-rich, making them better suited for early AI deployment. Nearly one-third of respondents plan to implement AI within the next few years, reflecting steady momentum. Improvements upstream can cascade downstream through more predictable device performance, tighter colour control, fewer consumable stockouts, and better service response times. As suppliers reduce defects and optimise forecasting with AI, PSPs benefit indirectly via higher uptime, improved substrate and ink consistency, and simpler integration into automated workflows.

FIGURE 13 **INCORPORATING AI IN OPERATIONS**

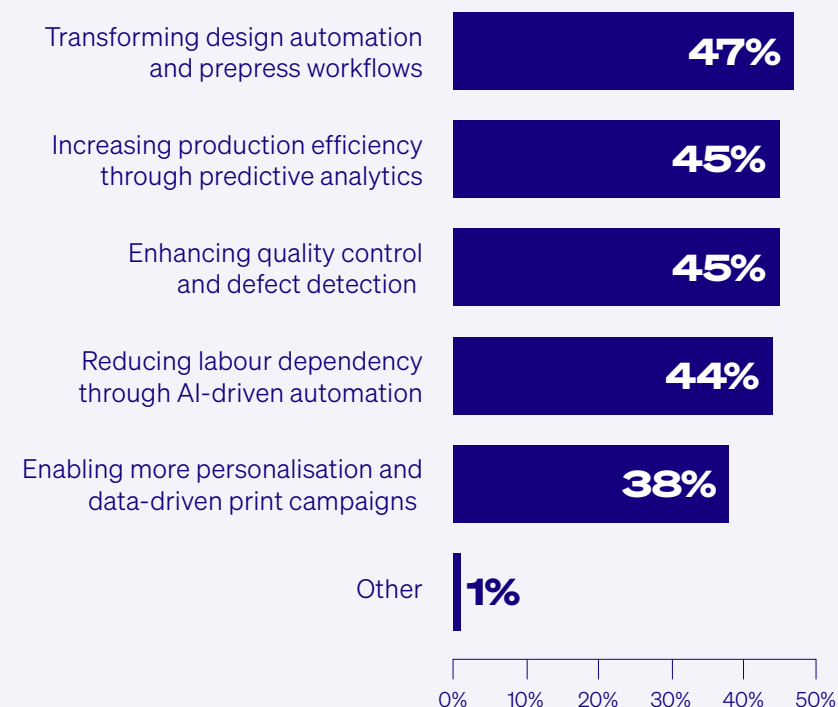
How are you incorporating AI into your manufacturing, logistics, or supply chain operations? (Multiple choice)



Respondents expect AI to reshape the print industry in the near term, particularly through automation of design and prepress tasks. Nearly 50% expect significant changes in design automation and prepress workflows. Additional expectations include improved quality control, defect detection, and predictive analytics to boost operational efficiency. These projected impacts align with industry pain points such as reprints, inconsistent colour accuracy, and staff shortages. Early AI adoption also supports environmental and sustainability goals by reducing waste and energy consumption.

FIGURE 14 **AI'S IMPACT ON THE PRINT INDUSTRY**

How do you see AI impacting the print industry over the next 5 years? (Multiple choice)



RECOMMENDATIONS

AI can be perceived as intimidating, particularly in small firms where concerns over job security and disruption may be more acute. As AI adoption expands, the following tailored recommendations aim to support print stakeholders at various stages of maturity:

Manufacturers should continue embedding machine learning in core systems (especially for colour consistency, job routing, and dynamic scheduling) to enhance product value. Interoperability must be a design priority. AI-enabled tools should integrate seamlessly with existing software to minimise implementation friction.

Staff training is essential to reduce fear and maximise the value of AI. Emphasise that AI complements, rather than replaces skilled labour. Dealers and distributors should assist customers in identifying specific workflow areas where AI delivers tangible ROI. Highlight low-cost, low-risk starting points.

There is currently no reference to workforce reskilling or development, a key gap considering rising concerns over job displacement. Industry associations and vendors could address this through training programs aligned to emerging AI roles.

PSPs should begin with focused applications that address near-term challenges—such as automated quoting, preflight checking, or predictive maintenance, before scaling to broader solutions.

These recommendations should ideally be tailored by business size (micro, SME, large enterprise) and include cost guidance and time-to-value examples.

Sales and service teams need training to effectively communicate AI benefits, correct misconceptions, and provide implementation support tailored to micro and SME customers.

Opinion



AI is moving decisively from concept to implementation, reshaping business models, operational dynamics, and customer expectations across the print sector. Although some companies are embedding AI into products and workflows, many PSPs remain hesitant, often due to lack of knowledge, limited internal capacity, or unclear benefits. The key barriers to adoption remain knowledge gaps, lack of training, and uncertainty around effective deployment—especially for smaller firms. Addressing these obstacles requires not only accessible technology but also cultural alignment, training, and cross-industry support mechanisms.

PSPs stand to gain from workflow acceleration, enhanced design and content creation, reduced error rates, and predictive scheduling. Quick wins are possible for firms that focus their AI investments on high-impact, low-barrier use cases—such as job quoting, imposition, or chatbot-based FAQs. As industry understanding grows and practical benefits become evident, AI's role in the print sector will expand meaningfully.



Early PSP successes are already visible in achievable, low-risk areas: AI-assisted preflight that flags missing fonts or low-resolution assets before RIP, AI-guided nesting tools for textile and signage that reduce substrate waste, and conversational chatbots that handle routine order-status queries. These examples demonstrate that meaningful gains do not require extensive data science expertise, only targeted use of mature tools in constrained workflow steps.

Dealers, distributors, and manufacturers are critical enablers of AI progress. They can lead with bundled offerings, integrated support, and customer training. They must also help demystify AI, translating technical features into business outcomes. Ultimately, AI adoption will succeed through collaborative ecosystems that support learning, reduce risk, and match solutions to the realities of smaller firms.

The speed of change is accelerating and there should be no doubt regarding the systemic disruption that will impact almost every business process. Beyond monitoring AI integration into workflow tools it is essential to get involved in developing prompting skills and understanding the value of AI agents in making repetitive tasks easier and faster to complete.



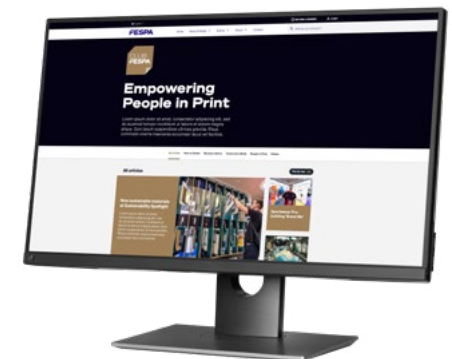
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