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PRINT CENSUS

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PRINT CENSUS 2026

Executive Report

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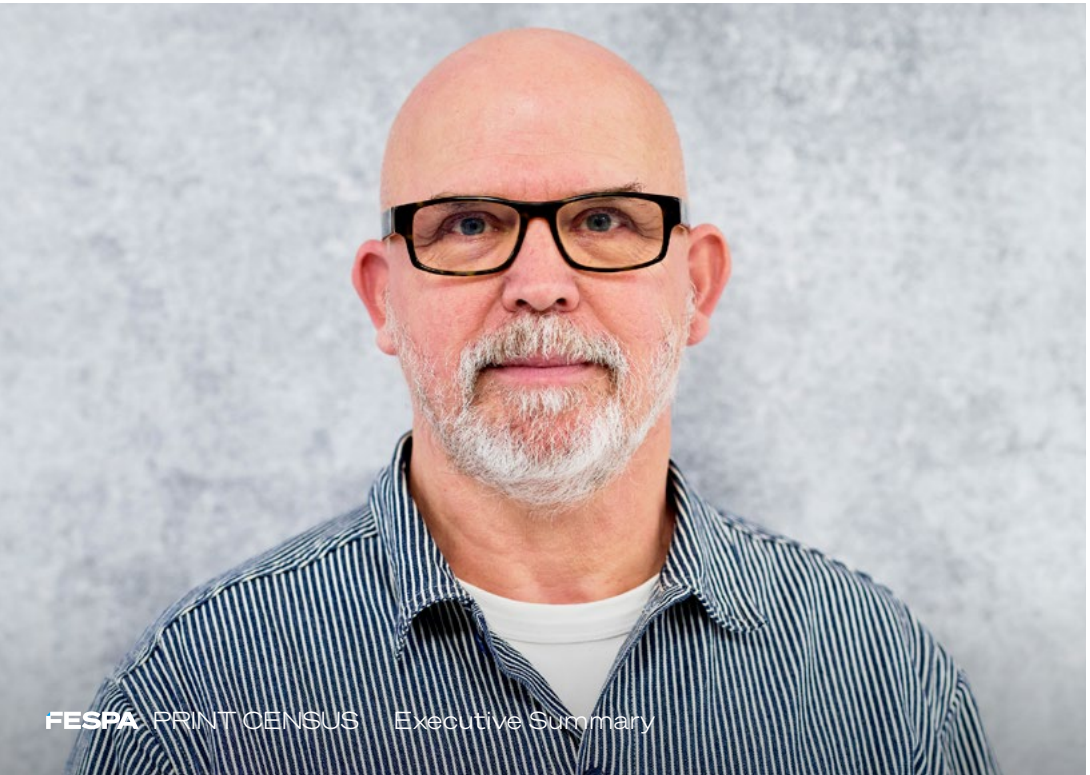
Welcome

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

Executive Summary

The FESPA Print Census now runs every 6 months – delivering more relevant insights, more often!

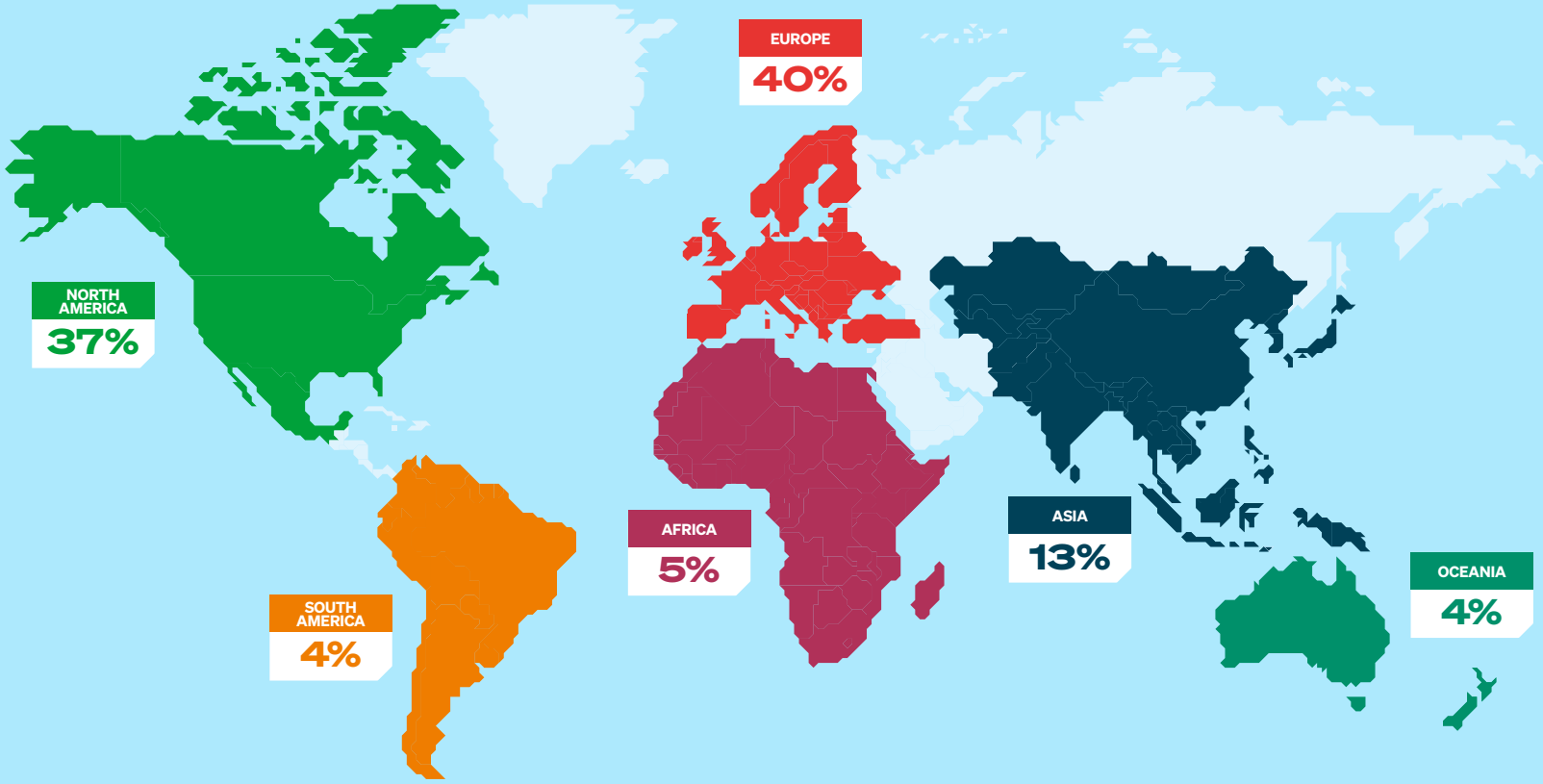
The FESPA Print Census survey is a global research initiative designed to gather and share essential market intelligence for the print & sign community.

With almost 800 participants representing 89 countries, this survey extends the long-standing research partnership between FESPA and Keypoint Intelligence, first established in 2007. 40% of respondents are already FESPA members, with the largest share coming from North America and Europe.

The FESPA community is both diverse and expanding, and this study was developed to examine service providers across its key segments. Survey participants represented a wide spectrum of businesses involved in wide-format signs and graphics, digital textile printing, industrial printing, and label and packaging production.

Among the services offered by respondents' companies, indoor signage, outdoor signage, banners, and labels were the most common, with textile and apparel printing also strongly represented.

RESPONDENTS BY CONTINENT



Introduction

The 2025 FESPA Print Census presents a global analysis of how the printing industry is responding to structural, technological, and environmental pressures, with specific emphasis on sustainability, artificial intelligence (AI), and automation. Based on responses from 774 businesses across six continents, the study explores capability gaps, adoption trends, and strategic priorities across a diverse range of markets and firm types.

A defining feature of the respondent base is the high proportion of micro and small Print Service Providers (PSPs), who account for 66% of the sample. Among them, 45% employ fewer than ten people, and 27% report annual revenues under 250,000 USD. These firms are often owner-operated, with limited administrative capacity and short planning horizons. Their structural characteristics restrict investment, reduce strategic flexibility, and contribute to slower adoption of new technologies.

Although awareness of AI, automation, and sustainability is high, implementation remains uneven. Many PSPs face internal barriers such as constrained cashflow, limited technical expertise, and uncertainty regarding return on investment. Adoption typically occurs in isolated areas – design tools, web-to-print platforms, or sustainable materials – rather than through coordinated transformation. Operational realities, rather than lack of interest, are the primary cause of delayed uptake.

While the census includes firms from 89 countries, the readiness gap between mature and emerging markets remains significant. Businesses in more developed economies report higher integration of AI and automation. Firms in lower-capital environments often cite infrastructure limitations and weak training pipelines. These geographic and structural differences provide important context for understanding the findings.

Suppliers and manufacturers, who make up 34% of respondents, report broader resource access and more advanced capabilities. These businesses are leading the development of AI-enabled tools and sustainability-focused materials. Yet the survey also highlights a disconnect between supplier innovation and PSP implementation. Many PSPs are unaware of available solutions or lack the means to integrate new tools with legacy workflows.

By revealing the structural constraints behind these trends, the 2025 FESPA Print Census offers a critical lens to evaluate the sector's current capabilities and the factors influencing its future development. The data illuminate gaps between technological availability and practical uptake, and show how firm size, market position, and geographic context shape strategic decisions. These conditions often determine whether businesses can adopt innovation or must delay it. Interpreting the findings through the lens of business scale and regional maturity is essential to understanding the pace and direction of change across the global print industry. This approach helps distinguish between capability limitations and market-driven hesitancy, making the insights more relevant for suppliers, PSPs, and industry stakeholders.

Key Highlights

The 2025 FESPA Print Census offers valuable insights into how the global printing sector is responding to mounting pressures around environmental responsibility, technological innovation, and operational efficiency. Drawing on 774 respondents across 89 countries, this report outlines the industry's progress in integrating sustainable practices, adopting artificial intelligence, and automating key workflows. Full and detailed reports that focus on these areas separately are available from FESPA.

THE FOLLOWING ARE THE KEY HIGHLIGHTS FROM THIS STUDY:

1 SUSTAINABILITY RECOGNISED BUT NOT FULLY REALISED

While 92% of PSPs state that sustainability is important to their business, only 40% describe it as a central strategic priority. This gap suggests that many firms support the concept in principle but lack the structure, resources, or incentives to translate that commitment into measurable outcomes. In many cases, sustainability remains an intention rather than a driver of operational decisions or investment planning.

2 CUSTOMER DEMAND FOR SUSTAINABILITY REMAINS LOW

Only 20% of PSPs believe sustainability significantly influences customer purchasing behavior. This may reflect the fact that many micro-PSPs serve clients who prioritise cost above environmental performance. Smaller firms often do not engage in proactive education or marketing to raise awareness of sustainable options, which limits both visibility and demand.

3 HIGH MATERIALS COSTS AND LOW ROI ARE BARRIERS

60% of PSPs identify the higher cost of sustainable materials as the primary obstacle to adoption. For smaller firms that purchase in limited volumes, the lack of access to bulk pricing leads to higher per-unit costs, making sustainable options financially less viable. Additionally, many PSPs report difficulty in quantifying the business benefits of these investments, which makes it harder to justify the transition within short-term financial planning cycles.

4 AI USAGE IS STILL EMERGING ACROSS THE SECTOR

39% of PSPs do not use AI at all; only 7% report moderate or significant AI integration. These low percentages are rarely due to a lack of interest. Most often, firms report barriers such as limited time, insufficient skills, or unclear pathways for starting. Smaller teams in particular face operational "overwhelm" and struggle to allocate attention to emerging technologies without immediate returns.

5 AUTOMATION ADOPTION REMAINS INCONSISTENT

Nearly half of PSPs report no use of automation. For many, the subject appears out of reach due to concerns about high expense or operational difficulty, even though scalable and lower-cost solutions are available. This reluctance often stems from limited exposure to available options and uncertainty about how to begin implementation.

6 LIMITED AI ADOPTION FOCUSES ON BASIC FUNCTIONS

Where used, AI is applied primarily to design assistance, colour management, and scheduling. These are seen as practical, lower-risk entry points that offer immediate benefits without requiring major workflow changes. However, they often remain stand-alone tools and are rarely integrated into broader production systems.

7 CURRENT AUTOMATION FOCUS IS NARROW IN SCOPE

Most automation efforts remain limited to specific, standalone tasks such as web-to-print portals, basic job estimation, and colour calibration. These functions are relatively simple to deploy and do not require major infrastructure changes, making them more feasible for smaller firms. However, this narrow focus restricts the overall impact of automation, as it does not extend to connected systems that manage scheduling, finishing, or data-driven production workflows.

8 KNOWLEDGE AND EXPERTISE GAPS INHIBIT AI PROGRESS

Over one-third of PSPs report lacking either the in-house skills or the awareness needed to evaluate and adopt AI tools. In smaller firms, where training is often reactive and tied to immediate revenue needs, there is little time or structure for exploring new technologies. This limits exposure to emerging solutions and contributes to uncertainty about where AI can be applied effectively within their operations.

9 SUPPLIERS ARE DRIVING INNOVATION BUT FACE SLOW UPTAKE

While 45% of manufacturers plan to introduce AI-enabled tools, many cite low PSP demand and integration challenges. Many PSPs are not fully aware of what tools are available or how to integrate them into existing workflows. This disconnect suggests that communication between solution providers and end users remains insufficient.

Sustainability Trends and Challenges

Sustainability has gained prominence as a business concern across the industry, but its implementation remains uneven. Among Print Service Providers (PSPs), 40% state that sustainability is a core priority. Another 52% are pursuing greater sustainability but do not consider it central to their business model. Only 8% say it is not a priority at all. These perspectives, however, have yet to translate into consistent operational outcomes. On average, just 35% of print output uses sustainable materials or inks, with most firms reporting minimal adoption levels ranging from 1% to 10%, or limited engagement near 30%. Only 4% of PSPs have reached full or near-complete integration of sustainable practices.

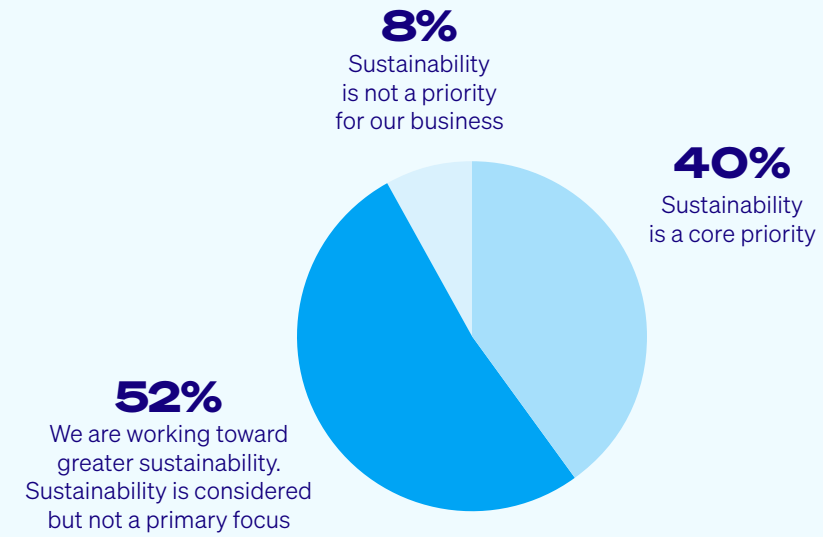
While 64% of PSPs use eco-friendly inks and 57% have implemented waste reduction or recycling programs, these efforts are not always visible to clients. 41% percent of firms do not actively communicate their environmental credentials, and only 25% include sustainability metrics or certifications in client proposals. As a result, customer awareness remains low. Most PSPs report that sustainability does not drive purchasing decisions, and only 20% believe their clients incorporate environmental considerations into procurement in a meaningful way.

This low level of demand may reflect more than just client preference. Many micro-PSPs serve markets that are highly price-sensitive, and their customers may not raise environmental concerns unless prompted. In these environments, sustainability is often perceived as a secondary factor, not because clients oppose it, but because providers have not positioned it as a visible or competitive element of their offering. Smaller firms, in particular, may lack the resources or confidence to engage in proactive customer education, further limiting uptake. This passivity results in a cycle where low communication reinforces low demand.

The financial dynamics further complicate implementation. 60% of PSPs identify high material cost as the main barrier to sustainable adoption. This is particularly pronounced among micro-enterprises, which often purchase in low volumes and therefore pay higher unit prices. Without access to bulk pricing or long-term supplier contracts, sustainable inputs remain difficult to justify within limited operational budgets. Additionally, 52% cite lack of demand as a deterrent, while 41% mention restricted availability of certified sustainable products.

FIGURE 1 **APPROACH TOWARD SUSTAINABILITY**

Which of the following statements describes your company's approach toward sustainability?



Only 4% of PSPs report near-complete integration of sustainability, and these firms display a distinct operational profile. They engage in structured communication with clients, make targeted investments in sustainable materials and processes, and embed environmental goals within broader business strategy. For these firms, sustainability is not simply a response to regulation or customer pressure. It is a deliberate positioning strategy aligned with long-term value creation.

Suppliers and manufacturers report similar challenges. Nearly half have expanded their product portfolios to include sustainable options, but one in five still do not assess the environmental performance of their offerings. The most commonly developed products include eco-friendly inks, energy-efficient presses, and biodegradable substrates. While regulatory influence is expected to grow over the next five years, many manufacturers note the absence of consistent incentives or support mechanisms that would drive more rapid adoption.

Artificial Intelligence and Readiness

Artificial intelligence (AI) is widely recognized as a potential vehicle for transformation in the printing industry. It offers a path to greater efficiency, smarter workflows, and more personalised services. However, the survey reveals that, despite strong interest, actual adoption remains limited across much of the sector, particularly among small and mid-sized Print Service Providers (PSPs), who form the majority of the industry's operational base.

According to the survey, 39% of PSPs currently do not use any form of AI in their business. This is not typically due to disinterest. Instead, it reflects persistent internal constraints such as lack of time, inadequate technical capacity, and limited exposure to available tools. Many small teams manage both production and administration, leaving little bandwidth for evaluating emerging technologies. This contributes to decision fatigue, where the number of choices and perceived complexity of AI can overwhelm already stretched resources.

Only 7% of PSPs describe their AI usage as significant or extensive, indicating that most implementations remain in early-stage or trial phases. Among those applying AI, the most common use cases include AI-assisted design tools (41%), automated colour management (19%), job scheduling (14%), and predictive maintenance (11%). These functions are typically used in isolation and are not yet linked to broader workflows. The most common applications include design assistance and colour automation, which are viewed as practical, lower-risk entry points that provide modest gains without requiring major systems integration. However, because they are not connected to end-to-end platforms, their impact remains limited.

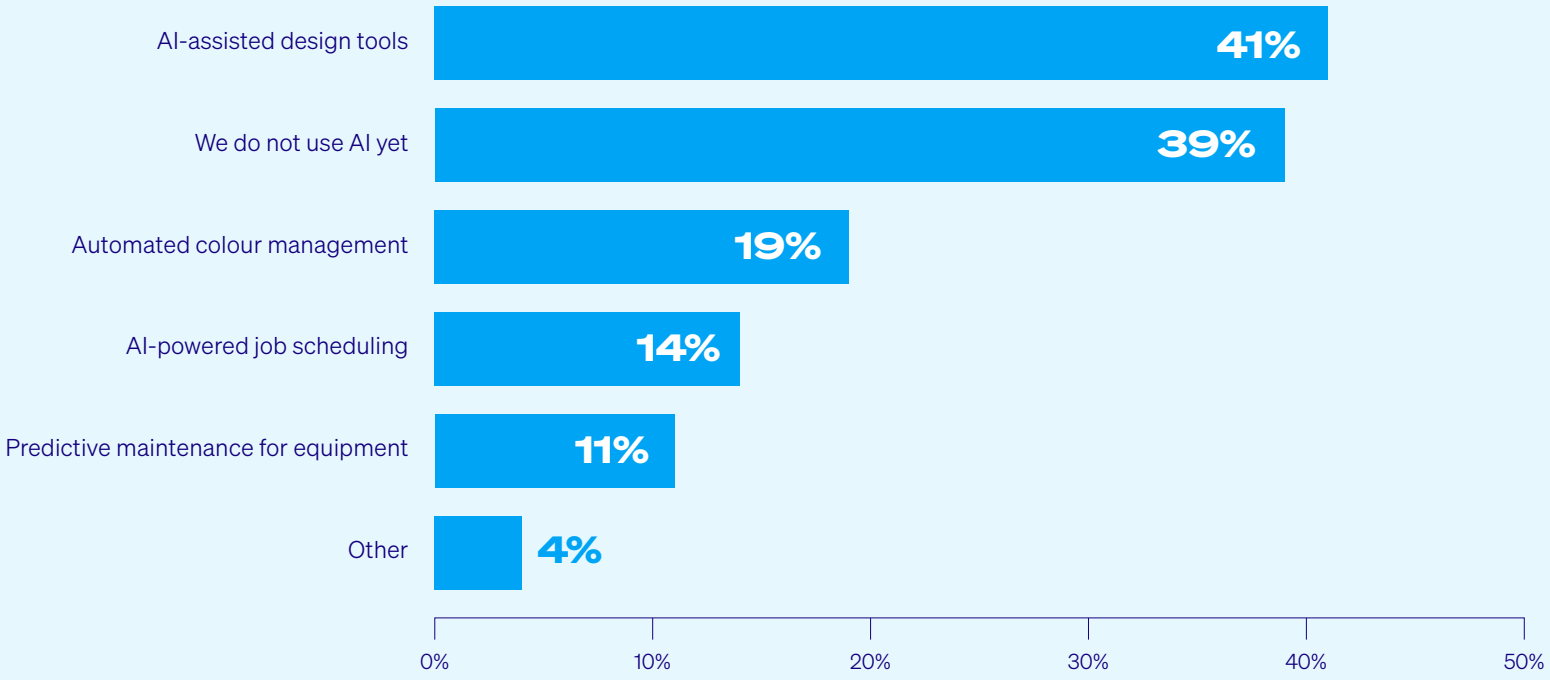
A major barrier to broader adoption is lack of internal knowledge. 38% of PSPs report being unaware of relevant tools, and an equal share lack the internal skills to evaluate or deploy them. For micro-firms especially, training is rarely prioritised unless directly tied to revenue. These capability gaps are compounded by concerns around reliability, data security, staff resistance, and the uncertainty of returns on small-scale jobs. In many cases, older systems and infrastructure limit the feasibility of integrating AI, raising the threshold for implementation.

Suppliers and manufacturers, by contrast, are more advanced in their AI development efforts. 25% currently offer AI-enabled tools, and another 45% plan to add such capabilities in upcoming products. These include intelligent workflow automation, predictive maintenance, automated customer interactions, and personalised content generation. Despite this progress, demand from PSPs remains inconsistent. 42% of suppliers say that clients express interest in AI but show limited follow-through, while 42% report that AI is not yet part of their clients' strategic agendas.

Nonetheless, expectations for AI's long-term role in the industry are high. 47% of suppliers anticipate that AI will reshape design automation and prepress workflows. Another 45% expect improvements in production efficiency and quality control, and 44% believe AI will help reduce reliance on manual labour by automating repeatable tasks. Additionally, 38% foresee AI enabling greater personalisation and data-driven customer engagement. Early adopters already report improvements in quoting speed, turnaround time, and responsiveness—indicating that incremental investment may yield strategic advantages for firms prepared to move beyond initial pilots.

FIGURE 2 **ARTIFICIAL INTELLIGENCE APPLICATIONS USED**

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



Automation Progress and Barriers

Automation remains a critical but inconsistently applied tool across the global printing industry. The 2025 FESPA Print Census reveals that while many Print Service Providers (PSPs) recognise automation's potential to streamline operations and improve efficiency, its practical adoption is limited. Despite the maturity of many automation technologies, implementation continues to lag, particularly among smaller firms with constrained capital and legacy infrastructures.

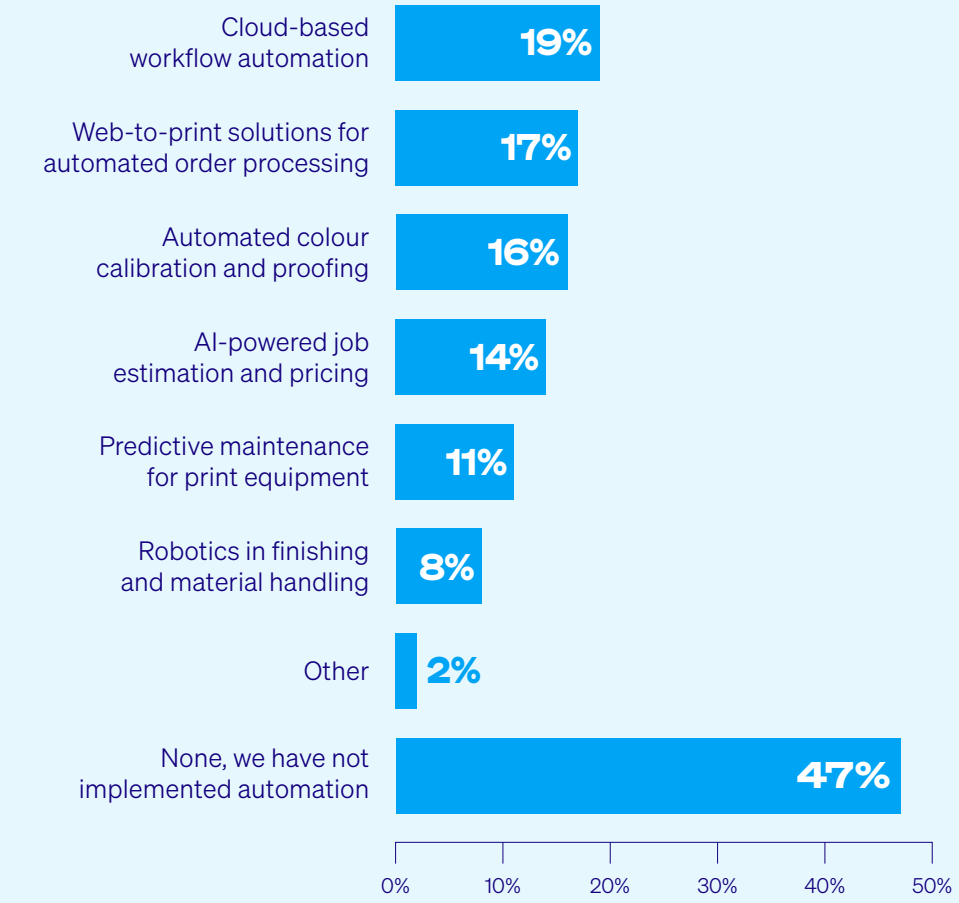
According to the survey, 47% of PSPs have not implemented any form of automation. This figure underscores broader challenges related to operational maturity. Many micro-firms continue to rely on manual systems, including handwritten job tickets, spreadsheets, and email-based scheduling. Among the 53% that have adopted some level of automation, implementation is often narrow and task-specific. Only 6% describe their AI-based automation use as significant, and just 1% report extensive integration across operations. These outcomes point to a sector still in the early stages of automation maturity.

Most automation today focuses on basic functions such as cloud-based workflow automation (19%), web-to-print portals (17%), automated colour calibration and proofing (16%), job estimation (14%), and predictive maintenance for print equipment (11%). Robotic material handling and automated finishing remain rare, with adoption rates of just 8%. These patterns reflect a broader reality in which automation is deployed as isolated solutions rather than part of a cohesive production strategy.

Those who have introduced automation report tangible benefits, including improved turnaround time (37%), reduced manual labour (27%), higher consistency and quality (25%), and more reliable scheduling. However, more than 55% of PSPs do not measure the impact of their automation investments. Without clear metrics, firms face difficulty justifying additional investment or expanding system functionality. This lack of performance tracking limits both organisational buy-in and long-term planning.

FIGURE 3 **AUTOMATION TECHNOLOGIES USED**

What types of automation technologies have you implemented in your print operations? (multiple choice)

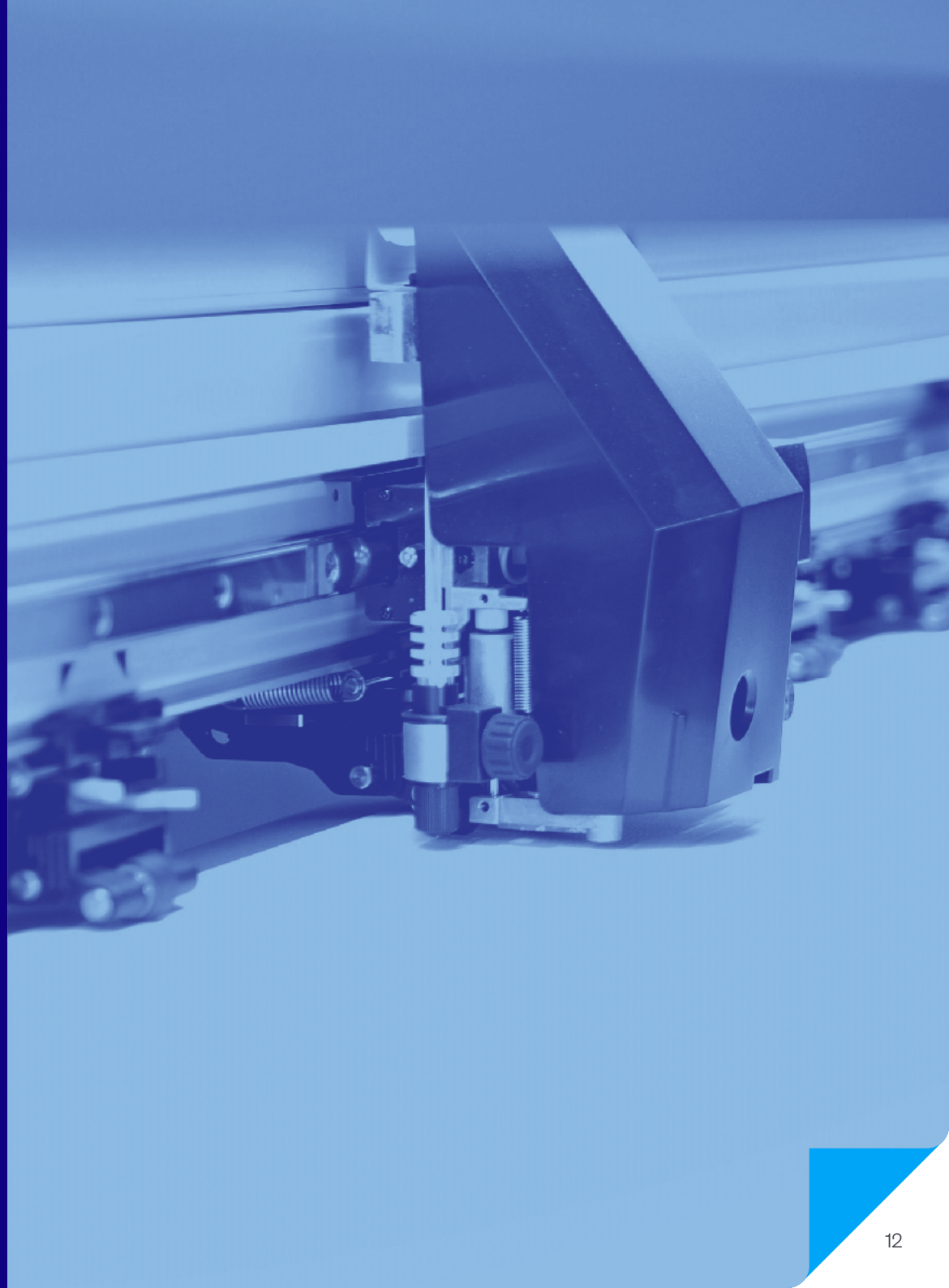


Looking ahead, many PSPs are planning incremental automation investments. Workflow automation for job tracking and scheduling is cited by 37% as a priority. Enhancements to online ordering and customer portals are planned by 32%, and an equal share aim to automate prepress functions such as file preparation and proofing. Other areas of focus include ERP or MIS system integration (21%) and customer communication workflows (26%). Advanced applications such as robotics and predictive analytics remain limited to a small number of firms with greater technical and financial capacity.

The most commonly reported barriers to automation are high upfront costs (45%), difficulty integrating with legacy systems (37%), lack of internal expertise (38%), and limited time or resources for implementation (32%). While only 14% cite uncertainty around ROI, this figure may be understated given that most firms do not track performance outcomes systematically. For smaller PSPs, particularly those operating with outdated or mixed-brand equipment, hardware compatibility adds another layer of difficulty that deters system upgrades.

Manufacturers and suppliers confirm the same challenges. Many are actively developing automation platforms, including robotic solutions and cloud-based workflow tools, but adoption remains slower than anticipated. Barriers include physical space limitations, retraining requirements, and internal resistance to changing long-standing workflows. Although 45% of suppliers are investing in automation R&D, only 11% expect full automation to be standard in PSP operations by 2027.

These findings indicate that the primary obstacles to automation are not technical, but organisational. Many firms have access to viable tools but are not positioned to absorb them. The sector is likely to progress in stages, beginning with prepress automation and extending gradually into scheduling, basic finishing, and data- driven workflows. As cost pressures and labour constraints intensify, a measured and outcomes-focused approach to automation will become increasingly necessary for long-term competitiveness.



Our network of **37 National Associations** represents more than **14,000 printing businesses worldwide**. If there is no association in your country, you can join **FESPA Direct** today and enjoy exclusive member benefits.

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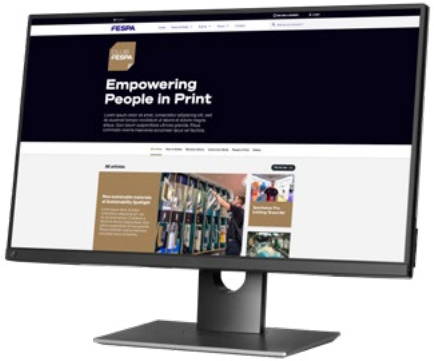

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