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PRINT CENSUS 2026

Sustainability

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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 Sustainability was conducted from May to September 2025 and provides a comprehensive view of the global print industry, with a focused lens on sustainability trends, initiatives, and challenges. The dataset comprises responses from 774 industry stakeholders, including Print Service Providers (PSPs), Equipment Dealers/Distributors, and Manufacturers. The study explores key business characteristics, customer types, service offerings, and sustainability practices while also assessing how sustainability influences commercial performance, margin protection, customer retention, and the ability to meet emerging procurement criteria.

With Print Service Providers accounting for 66% of all responses, the data reflects a strong voice from the service segment of the print value chain. Equipment Dealers/Distributors (19%) and Manufacturers (15%) also provide insights into upstream product innovation and supply chain issues. Notably, 45% of all businesses surveyed had 10 or fewer employees, emphasising the dominance of microenterprises. This significantly shapes the nature of sustainability behaviour throughout the report.

The primary objective of this report is to provide analysis of the data segmented by business type, to offer a granular view of industry perspectives. The report identifies current adoption rates of sustainable materials and processes, communication strategies, barriers to implementation, and the projected impact of regulatory developments. Importantly, the findings shed light on potential readiness gaps, with many small PSPs likely underestimating indirect regulatory impacts such as the Digital Product Passport (DPP), Extended Producer Responsibility (EPR), and the Corporate Sustainability Reporting Directive (CSRD). Additionally, there is a lack of operational clarity around what sustainability entails for smaller firms. This document provides separate sections for 511 PSPs and 263 equipment dealers/distributors & manufacturers. The results offer valuable indicators for industry stakeholders aiming to align with environmental and regulatory expectations while maintaining operational and financial viability. FESPA's sustainability trend monitoring plays a pivotal role in helping associations guide industry readiness, reduce greenwashing risks, and equip businesses with practical direction.

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

KEY SUSTAINABILITY CHALLENGES INCLUDE THE HIGHER COSTS OF SUSTAINABLE MATERIALS AND LOW CUSTOMER DEMAND.

These were listed as key challenges by PSPs as well as dealers/distributors/manufacturers. The economic impact is especially acute for micro-businesses with limited procurement leverage and weak access to bulk buying or tiered pricing.

3

ON AVERAGE, 35% OF PSPS' PRINT OUTPUT USES SUSTAINABLE MATERIALS OR INKS

This figure lacks granularity around what qualifies as "sustainable"—be it material type, ink composition, or energy inputs. Without standardised definitions, self-reported output is likely inconsistent, especially among smaller firms.

4

SUSTAINABILITY IS RECOGNISED BUT UNDER-LEVERAGED

40% of PSPs claim sustainability is a core priority, but only 4% report that 90% or more of their output uses sustainable materials or inks. This mismatch indicates that sustainability is often more aspirational than operational, driven by intent rather than structured implementation. Many firms lack defined KPIs, roadmaps, or competencies to convert strategic priority into measurable output.

5

LIMITED CUSTOMER DEMAND CONSTRAINS SUSTAINABILITY PROGRESS

52% of PSPs and 33% of upstream providers cite limited customer willingness to pay more as a key barrier yet 40% of PSPs considered sustainability to be a key business priority. However, low willingness to pay may reflect insufficient value communication, rather than true disinterest. Case studies consistently show that bundling sustainability with quality can unlock higher customer engagement.

6

HIGHER SUSTAINABLE-MATERIAL COSTS DISPROPORTIONATELY AFFECT MICRO-BUSINESSES DUE TO LIMITED PROCUREMENT LEVERAGE

These firms typically lack access to volume-based pricing, cannot meet supplier minimum order thresholds, and have minimal negotiation capacity. As a result, even modest unit price increases can significantly impact margins, making cost a structural barrier to sustainable adoption for this segment.

7

NEARLY THREE-QUARTERS OF DEALERS/ DISTRIBUTORS AND MANUFACTURERS EXPECTED SUSTAINABILITY REGULATIONS TO HAVE A MODERATE OR SIGNIFICANT IMPACT ON THEIR BUSINESSES OVER THE NEXT 5 YEARS

This is particularly relevant in Europe, where regulatory frameworks are evolving faster than in LATAM or APAC, leading to regionally divergent adoption rates.

8

OVER HALF OF TOTAL RESPONDENTS SERVED THE WIDE FORMAT SIGN & GRAPHICS SECTOR, WHILE NEARLY 40% SERVED DIGITAL TEXTILE PRINTING.

9

FOR DEALERS/DISTRIBUTORS AND MANUFACTURERS, THE MOST IN-DEMAND SUSTAINABLE OFFERINGS INCLUDE ECO-FRIENDLY INKS AND ENERGY-EFFICIENT EQUIPMENT.

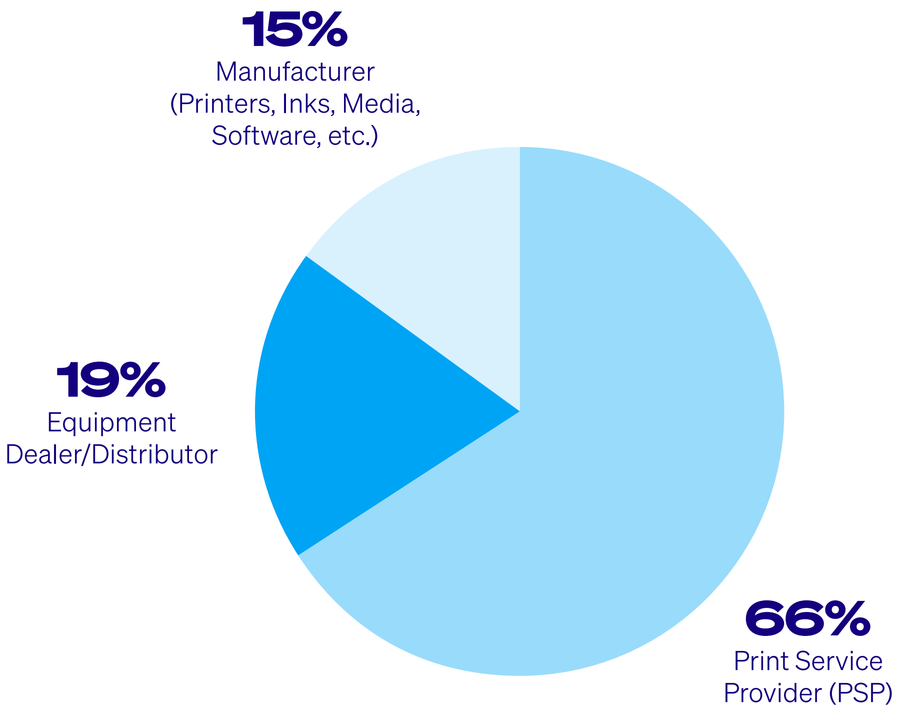
Research Findings

TOTAL RESPONDENTS

A total of 774 respondents participated in this year's survey. As shown in the Figure below, nearly two-thirds were PSPs. The remainder were equipment dealers/distributors or manufacturers. As noted earlier, the responses from these two groups are discussed separately later in this report.

FIGURE 1 **PRIMARY BUSINESS TYPE**

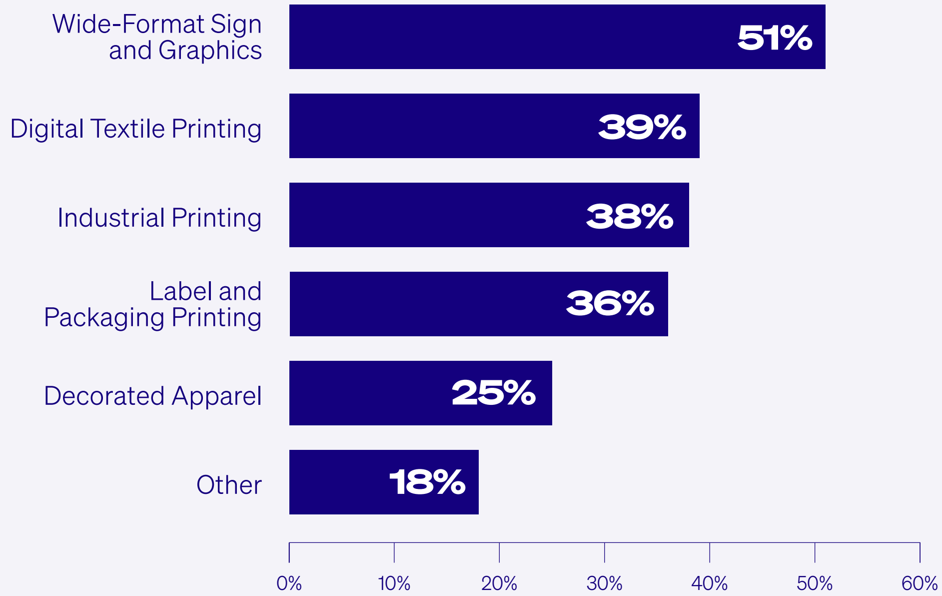
What is your primary business type?



Survey participants reported serving a variety of industries. Over half of respondents served the wide format sign & graphics industry, while nearly 40% served digital textile printing.

FIGURE 2 **INDUSTRIES SERVED**

What industry sectors does your company serve? (Multiple choice)



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. 45% of businesses had 10 or fewer employees. This prevalence of microenterprises helps explain the slower investment cycles and short-term focus seen throughout the data. Compared to larger firms, these small businesses are less able to allocate staff to sustainability roles or make long-term investments, which may reduce their visibility into market-shaping regulations or customer procurement trends.

FIGURE 3 **NUMBER OF EMPLOYEES**

How many employees does your company have?

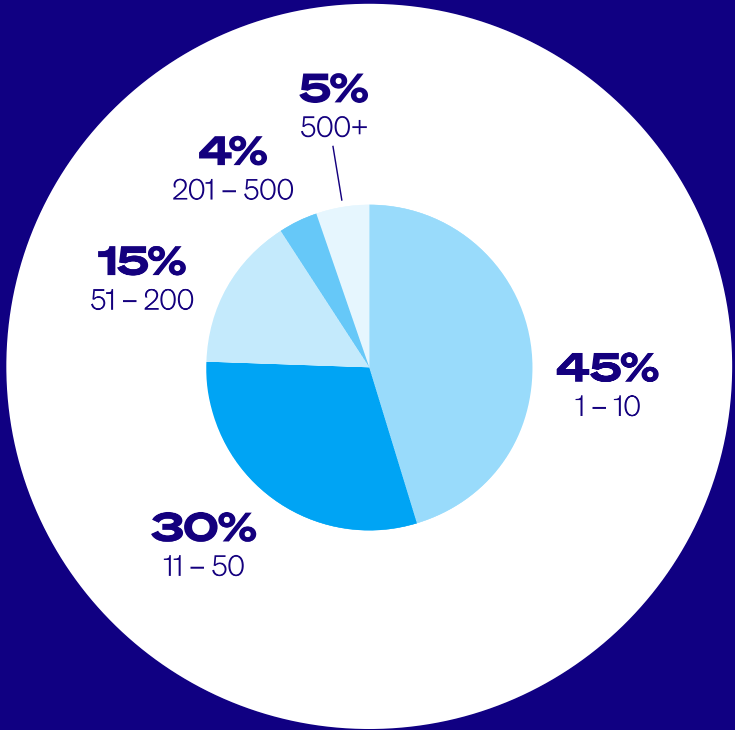
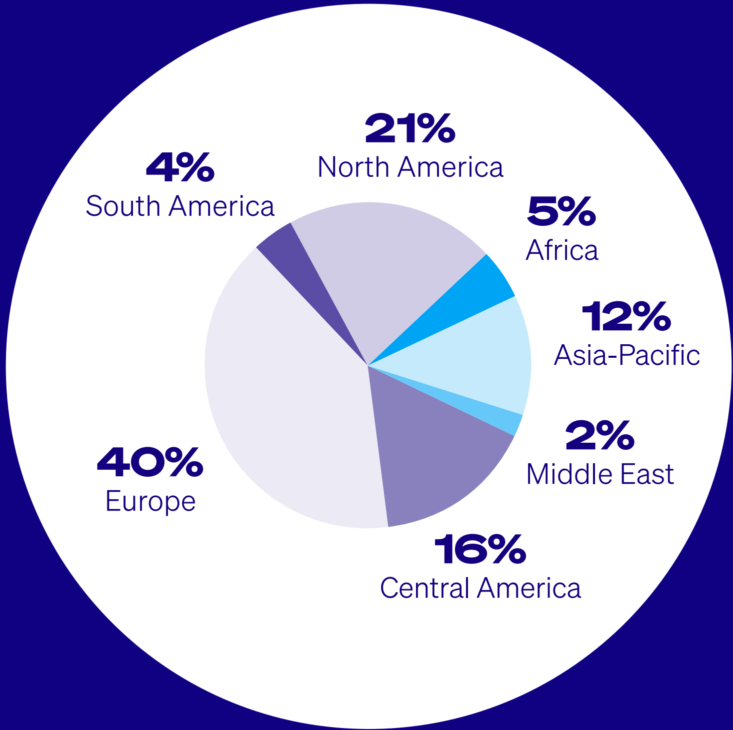


FIGURE 4 **BUSINESS LOCATION**

Where is your company located?



Regional behaviour also differs meaningfully. European respondents generally operate under stricter environmental compliance frameworks, which accelerates sustainability awareness and investment. By contrast, respondents from LATAM and APAC often face looser enforcement or delayed regulatory exposure, contributing to slower sustainability adoption. These regional disparities must be acknowledged when interpreting overall trends.

Although the highest share of respondents' businesses were located in Europe (40%), nearly as many (37%) were based in North or Central America. In total, respondents were dispersed across over 89 different countries.

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. FESPA and its network of national associations also serve a critical role in helping SMEs prepare for sustainability-related changes, offering education, tools, and peer insight to bridge capability gaps.

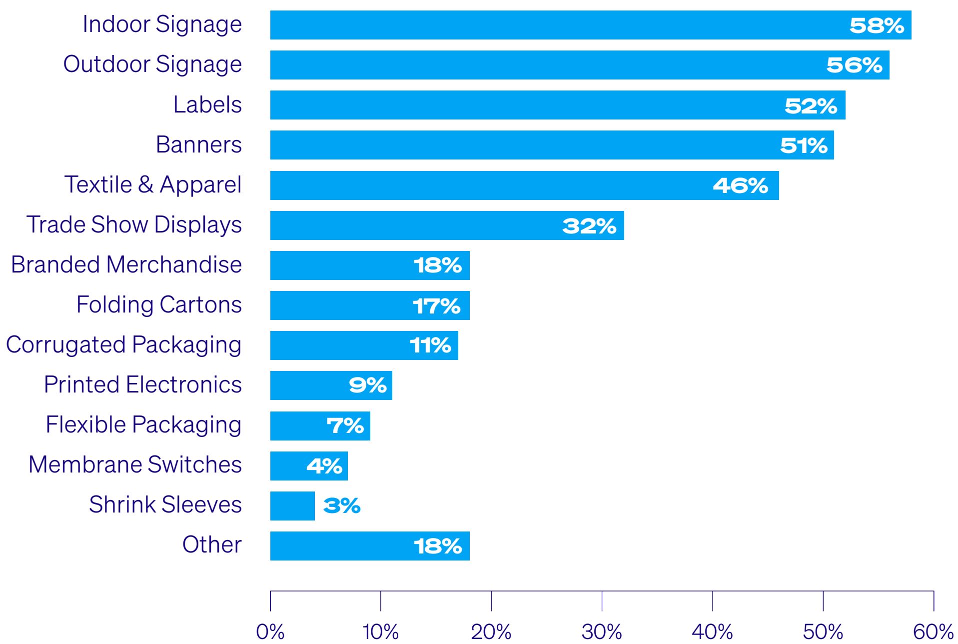
Print Service Providers

This section of the report focuses on the 511 survey participants that classified their businesses as print service providers (PSPs).

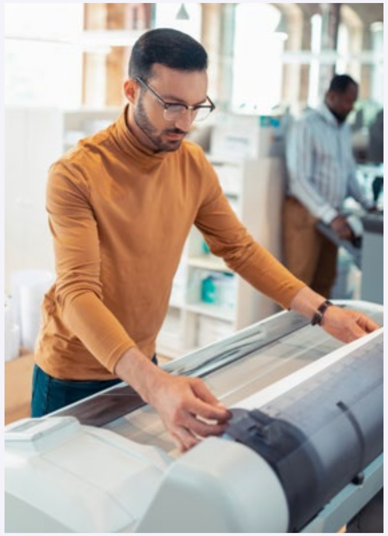
These respondents reported providing a wide variety of services, but the most common included indoor/ outdoor signage, labels, banners, and textiles & apparel. This diversity in service types is important when analysing sustainability behaviour. For instance, textile PSPs are already facing increased regulatory scrutiny around chemical usage, waste water, and materials (e.g., PFAS restrictions), while signage and display PSPs are under pressure to reduce reliance on PVC-based substrates and move toward recyclable or biodegradable materials. The nature of the service type directly shapes both the perceived urgency and type of sustainability initiatives adopted.

FIGURE 5 **PRINTING SERVICES**

What industry sectors does your company serve? (Multiple choice)



Due to customer demands, increasing regulations, and a desire for market differentiation, sustainability is becoming an important initiative for many wide format businesses. The convergence of tightening regulations, client procurement policies, and shifting brand values is gradually making sustainability not only a compliance issue, but a potential commercial differentiator for wide format PSPs. However, this pressure is applied unevenly since European PSPs report higher urgency due to more mature environmental regulation (e.g., EU Green Deal, EPR frameworks), while LATAM and APAC PSPs often operate in environments with lower enforcement or awareness. When PSPs were asked to describe their company's approach to sustainability, 40% stated that it was a core priority. Only 8% reported that sustainability was not a priority at all.



The 40% figure, while encouraging on the surface, must be interpreted cautiously. It likely reflects aspirational positioning rather than evidence of systematic action. Many PSPs—especially those with fewer than 10 employees—lack the internal capacity, financial resources, or technical knowledge to translate strategic intention into measurable outcomes. The absence of formal sustainability roles or dedicated KPIs often means that sustainability is discussed as a principle, but not tracked as performance. Conversely, the 8% who stated it is "not a priority" may reflect fear of cost, confusion about relevance, or a lack of regulatory visibility, rather than active resistance.

Moreover, this "priority without implementation" disconnect is a well-documented behaviour pattern among SMEs. Without structured support (such as supplier-provided switching guides or certification roadmaps) many PSPs stall at the awareness phase, unable to execute transformation. This underscores the importance of targeted training, regional association guidance, and sector-specific checklists.

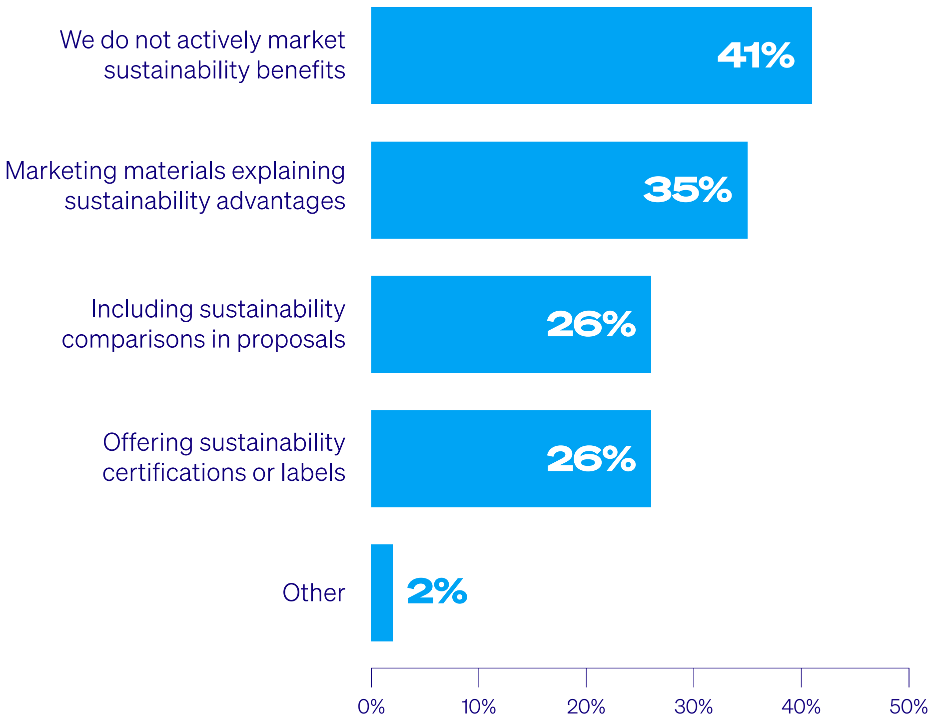
When respondents were asked how they were communicating sustainability benefits to their customers, the greatest percentage (41%) weren't actively marketing the benefits of sustainability. Among those that were, marketing materials were the most common method. The low rate of sustainability communication (41% not marketing at all) reveals a missed commercial opportunity. Most customers, particularly in sectors like retail or interiors, only perceive value in sustainability when it is explicitly explained. Lack of communication also suggests low internal confidence about what claims are substantiated, safe, or compliant with advertising standards. This hesitancy is often linked to fear of greenwashing—especially in regions with unclear labeling rules or inconsistent third-party validation. To address this, small PSPs can begin with simple, verifiable messaging. For example, statements such as "Printed with GREENGUARD Gold-certified inks" or "PVC-free media available upon request" are specific, low-risk, and supported by existing certifications. These claims are easy to document and demonstrate responsible practice without requiring extensive substantiation. PSPs should be encouraged to use customer-facing templates that align with available documentation.

FIGURE 6 **APPROACH TOWARD SUSTAINABILITY**

Regarding sustainability, which of the following statements BEST describes to your company?

FIGURE 7 **COMMUNICATING SUSTAINABILITY BENEFITS**

How do you communicate sustainability benefits to your customers? (Multiple choice)

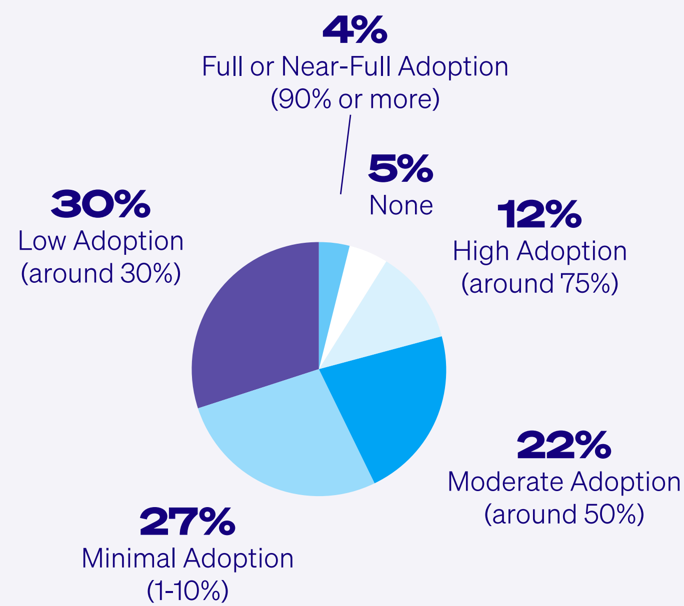


To address this, small PSPs can begin with simple, verifiable messaging. For example, claims like "Printed with GREENGUARD Gold-certified inks" or "PVC-free substrate available upon request" are low-risk and easy to document. Associations and suppliers should provide templates and training on sustainable messaging, not just material adoption. Without visible proof points, sustainability remains invisible to end clients and undervalued in competitive bidding.

On average, PSPs reported that 35% of their total print output used sustainable materials or eco-friendly inks. We do expect this share to increase over time due to customer demands, increasing regulations, and increased availability of eco-friendly materials. While 35% represents a positive directional signal, it masks significant variability across regions and sectors. For micro PSPs, access to sustainable materials is often constrained by supply chain factors such as minimum order quantities, inconsistent availability, or lack of comparable alternatives. Additionally, definitions of "sustainable" remain ambiguous across the industry. Is sustainability based on recycled content, renewability, biodegradability, energy efficiency, or end-of-life recyclability? Without shared terminology or third-party validation, self-reporting becomes inconsistent and difficult to benchmark.

FIGURE 8 **OUTPUT USING SUSTAINABLE MATERIALS**

Approximately what percentage of your total print output uses either sustainable materials?



The top two sustainability challenges among PSPs were the higher costs of sustainable materials and lack of customer demand. Both of these concerns are expected to improve over time, which should in turn help increase the adoption of eco-friendly alternatives.

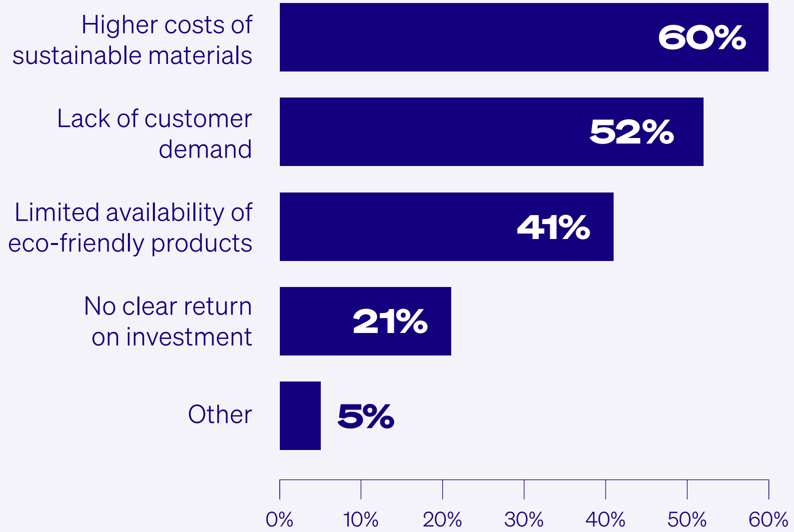
These challenges require a nuanced understanding. First, cost sensitivity among SMEs is high. Most operate on thin margins and short project cycles. Sustainable alternatives often carry a surcharge due to limited production scale and certification costs. Micro PSPs, lacking purchasing volume or distributor leverage, are hit hardest. Second, customer demand appears low partly because most PSPs do not actively propose sustainable options or explain their value proposition. In sectors like events or retail, where repeat business and brand perception are key, sustainability messaging can directly influence procurement decisions.

Sector-specific buyer behaviour matters greatly. For example, retail chains may be more receptive to FSC-certified or PVC-free substrates due to corporate social responsibility policies, whereas industrial customers may prioritise price and durability over eco-labels. Thus, PSPs must segment their client base, align sustainable offerings with relevant value drivers, and proactively educate their buyers, not wait for demand signals to emerge.

Buyer behaviour also varies significantly across sectors. Retail chains and event organisers, for example, are more responsive to sustainability certifications and marketing claims due to brand reputation concerns and public-facing operations. Industrial clients, on the other hand, often emphasise technical performance and cost over environmental attributes. Understanding these sectoral preferences allows PSPs to tailor their sustainability messaging and offerings more effectively.

FIGURE 9 **BIGGEST SUSTAINABILITY CHALLENGES**

What are the biggest challenges in transitioning to sustainable printing? (Multiple choice)



To help overcome the challenges associated with implementing more sustainable offerings, PSPs can do their part by embracing a culture of sustainability, educating their employees and customers about the benefits, and calculating the long-term ROI of implementing more eco-friendly equipment.

A more effective path for micro-businesses involves tactical, low-barrier steps. These include starting with energy monitoring to identify waste, switching to substrates with Environmental Product Declarations (EPDs), or prioritising suppliers with strong LCA documentation. Strategic progress should not depend on capital expenditure. FESPA and its member associations are well-positioned to distribute practical guides that reflect these realities.

When respondents were asked about the share of their customers that considered sustainability to be a key factor in choosing print services, the overall average was 20%. It should be noted, however, that 57% of PSPs put this share at 10% or lower.

This data point underscores a perception gap. PSPs often serve end-clients or local businesses that do not explicitly request sustainability criteria in procurement. However, this is rapidly changing. Global brands are now embedding sustainability clauses into RFPs and applying them to entire value chains, regardless of geography. PSPs operating one tier below these brands may be indirectly affected without realising it. This makes regulatory awareness and proactive positioning critical.

Moreover, the assumption that low interest equals permanent disinterest is risky. Buyers' awareness grows with exposure. Studies show that when PSPs bundle sustainability with quality (e.g., low-odour inks for indoor use or recyclable signage for corporate events) clients are more willing to pay a premium. This demonstrates that value perception is driven by framing, not only by intrinsic cost.

FIGURE 10 **ADOPTING SUSTAINABILITY AS A KEY FACTOR**

What percentage of your customers have adopted sustainability as a key factor in choosing print services?

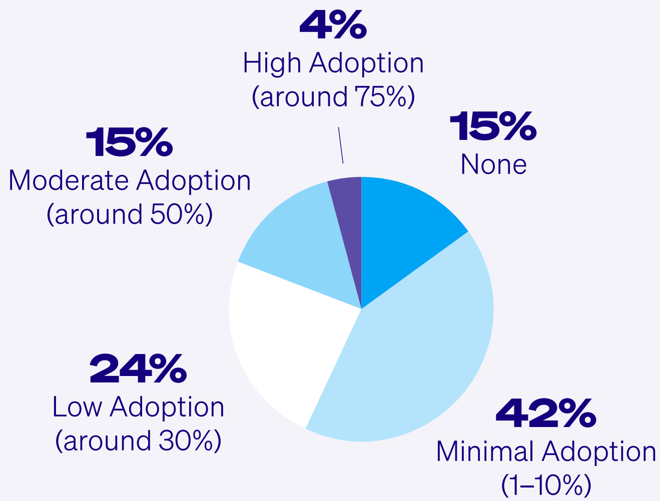
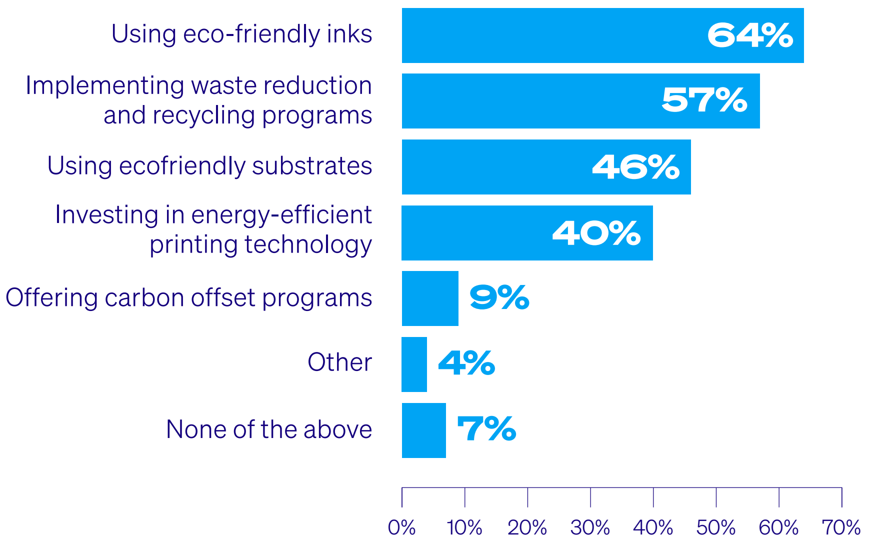


FIGURE 11 **KEY SUSTAINABILITY INITIATIVES**

Which of the following sustainable initiatives has your company implemented? (Multiple choice)



Key sustainability initiatives among PSPs included using eco-friendly inks and implementing waste reduction/recycling programs. Only 7% of respondents hadn't implemented any sustainability initiatives.

This pattern reflects "lowest-barrier" adoption. Eco-inks are often drop-in replacements with minimal workflow change. Recycling programs typically align with municipal waste systems and are easy to adopt. However, few PSPs report progress on more complex fronts such as full energy analytics, closed-loop material systems, or digital traceability, all of which will matter as future legislation expands. The prominence of GREENGUARD-certified inks highlights the value of visible, third-party endorsed claims. Yet broader uptake of certification frameworks like ISO 14001, FSC, or OEKO-TEX remains rare. This gap represents a missed opportunity for differentiation.

Sustainability is becoming more important, and some firms are even willing to pay a premium for it. PSPs cite the following as the top factors that make customers more likely to pay more:

Corporate or industry requirements that mandate eco-friendly printing	37%
Perceiving sustainability as a valuable brand differentiator	29%
Seeking sustainability certifications as part of their procurement process	22%
Viewing sustainability as a corporate social responsibility	21%

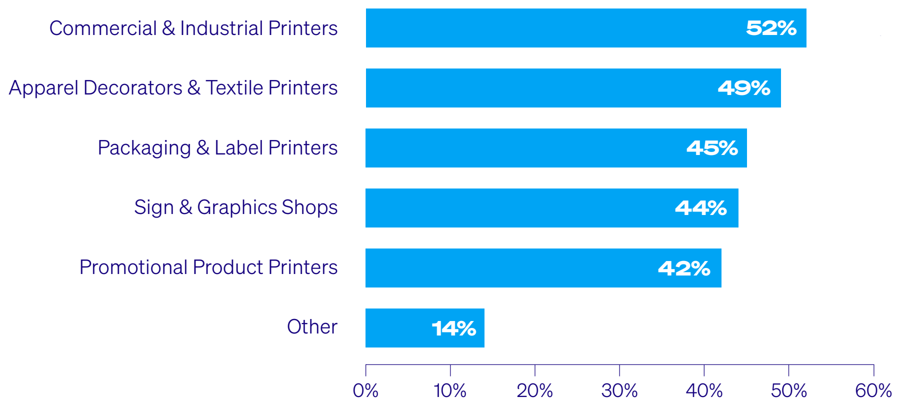
Dealers, Distributors, and Manufacturers

This section of the report focuses on the 263 survey participants that classified themselves as dealers/distributors or manufacturers.

When asked about the PSPs they served, respondents most commonly cited commercial/industrial printers or apparel decorators/textile printers. The customer profiles of these upstream stakeholders are important in explaining the variability in sustainability strategies. For example, serving textile decorators often exposes manufacturers to earlier and stricter sustainability regulations, such as those related to REACH, OEKO-TEX, or wastewater discharge. As a result, these suppliers may be more proactive in developing and promoting sustainable solutions. By contrast, suppliers focused on industrial or commercial sectors may face slower regulatory momentum and customer demand, which can delay product development or support investment.

FIGURE 12 **PSPs SERVED**

What types of Print Service Providers do you serve? (Multiple choice)

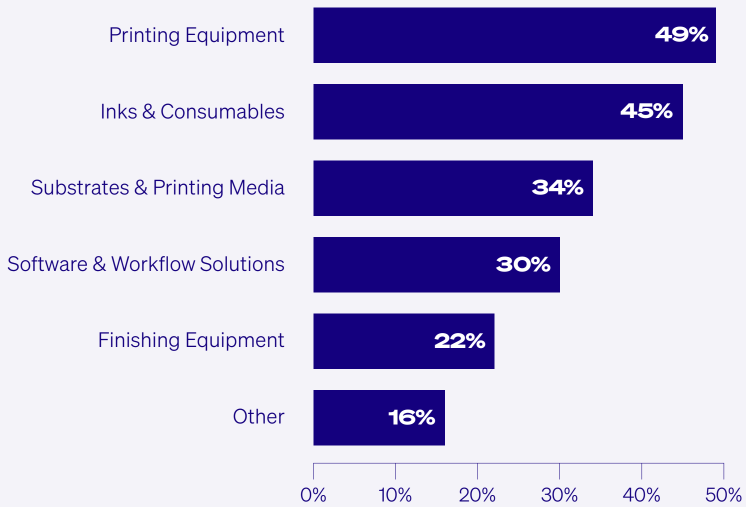


These respondents most commonly supplied or manufactured printing equipment, followed by inks & consumables. This product mix shapes the potential for sustainability innovation. Inks and consumables offer relatively faster development cycles and opportunities for reformulation with low-VOC, bio-based, or GREENGUARD-certified options. Equipment, while offering higher potential impact through energy efficiency gains, requires longer R&D timelines and higher capital investment from customers. Suppliers focused on hardware must also consider retrofitting and upgradability to enable customers to make sustainability progress without full replacement cycles.

Dealers/distributors and manufacturers support their customers with adopting more eco-friendly solutions in a variety of ways. The most common type of support was expanding sustainable product offerings, followed by helping their customers meet sustainability certifications or regulatory requirements, providing cost-benefit analyses for eco-friendly materials, and offering training on sustainability practices Only 20% of respondents didn't offer sustainability-focused support.

FIGURE 13 **PRODUCTS SUPPLIED OR MANUFACTURED**

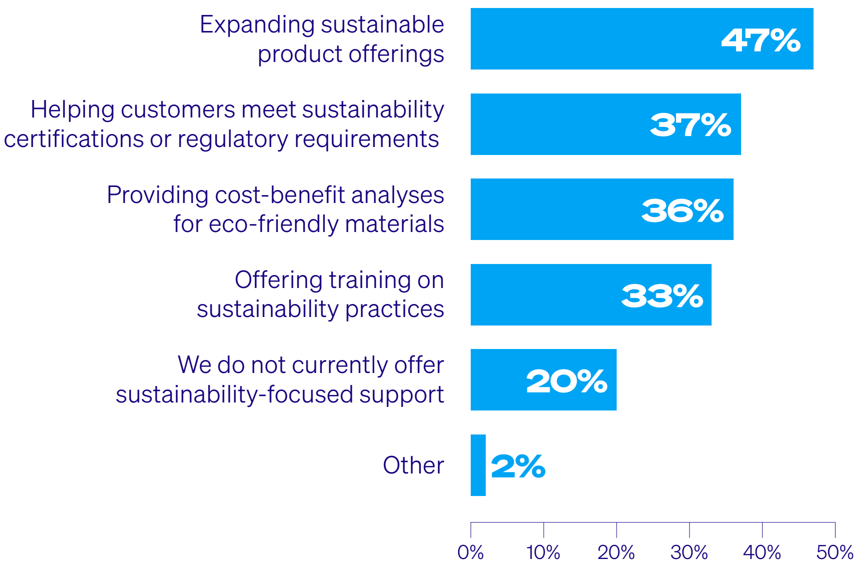
Which product categories do you supply or manufacture? (Multiple choice)



The 20% figure signals a significant capability gap. It suggests that a portion of upstream providers may lack internal sustainability expertise, or access to validated data such as Life Cycle Assessments (LCAs) and certification documentation. This limits their ability to guide PSPs meaningfully. In turn, PSPs, especially small firms, struggle to evaluate claims or select materials confidently. Manufacturers that can simplify this process with structured tools like "green switching guides" or standardised material comparison matrices (e.g., Antalis Green Star system) are likely to build trust and loyalty.

FIGURE 14 **SUPPORT FOR SUSTAINABLE ADOPTION**

How do you support your customers in adopting more sustainable printing solutions? (Multiple choice)



Moreover, the current support often focuses on compliance or product substitution. While valuable, this does not address deeper knowledge gaps. There is an opportunity to expand support models to include science-based education on sustainability trade-offs, such as carbon impact versus recyclability or virgin versus recycled content performance. Providing transparent data and case studies will help PSPs navigate complex decisions, particularly when sustainable alternatives come at a premium or require process changes.

When dealers/distributors/manufacturers were asked which single sustainable offering had seen the most growth in demand, the greatest percentage cited eco-friendly inks. Energy-efficient printing equipment, sustainable textile printing materials, and waste reduction/recycling programs was also quite popular.

The strong demand for eco-friendly inks is unsurprising, as they represent a low-risk, low-disruption upgrade for PSPs. However, their adoption is not necessarily indicative of full sustainability commitment. Many PSPs may overstate their environmental performance by highlighting ink choices while continuing to use substrates or workflows with higher environmental impacts. Manufacturers should be cautious in positioning inks as standalone proof points. Certification systems like GREENGUARD Gold help validate claims but should be supported by broader improvements in material and energy use.

Sustainable substrates, while gaining traction, face greater resistance due to higher price points, uncertain performance characteristics, and perceived customer indifference. Yet this is changing. Policy frameworks like Packaging Waste Regulations are beginning to introduce financial penalties for virgin PVC and incentives for recycled content use. Packaging Waste Regulations are also introducing material-specific surcharges, for instance, levies on virgin PVC exceeding thresholds for recycled content. These financial signals are prompting manufacturers to rethink substrate formulations and prioritise recycled inputs. Proactive suppliers are aligning product portfolios with these shifts to maintain cost competitiveness and regulatory compliance. Manufacturers that proactively align with these changes and disclose product LCAs or energy performance labels (e.g., Kavalan's Energy Star metrics), will be better positioned.

As noted earlier, there are challenges associated with offering more sustainable products. On the dealer/distributor/manufacturer side, the most common challenges were limited customer demand, high production costs, as well as a lack of internal expertise or resources to evaluate sustainable options and supply chain limitations.

These challenges are interconnected. Limited customer demand is often a reflection of poor communication and education, rather than a fundamental lack of interest. Many PSPs are unaware of the financial and brand advantages that can come from integrating sustainability into their service offering. Meanwhile, upstream providers may find it difficult to invest in sustainable innovation without clear pull-through demand. This creates a feedback loop where uncertainty discourages progress across the supply chain.

FIGURE 15 **DEMAND FOR SUSTAINABLE OFFERINGS**

What sustainable product offerings have seen the most growth in demand?

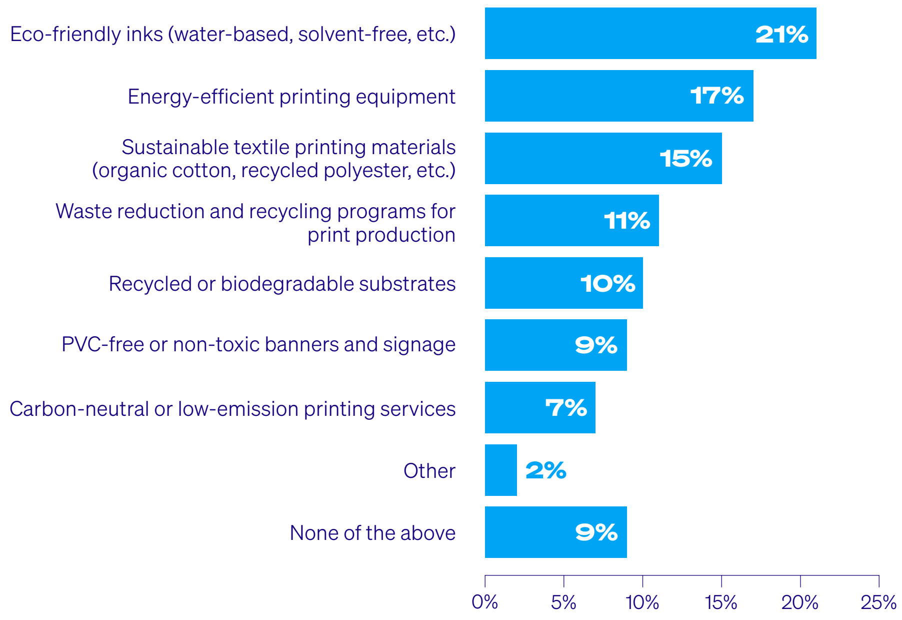
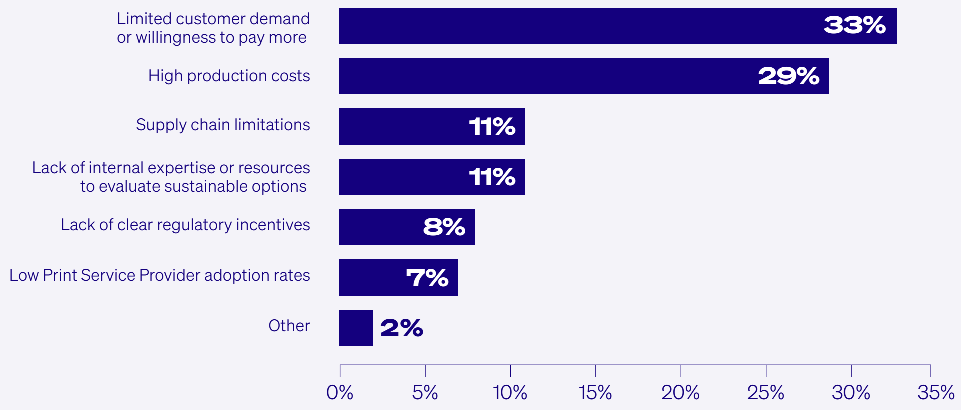


FIGURE 16 **BIGGEST OBSTACLE TO SUSTAINABILITY**

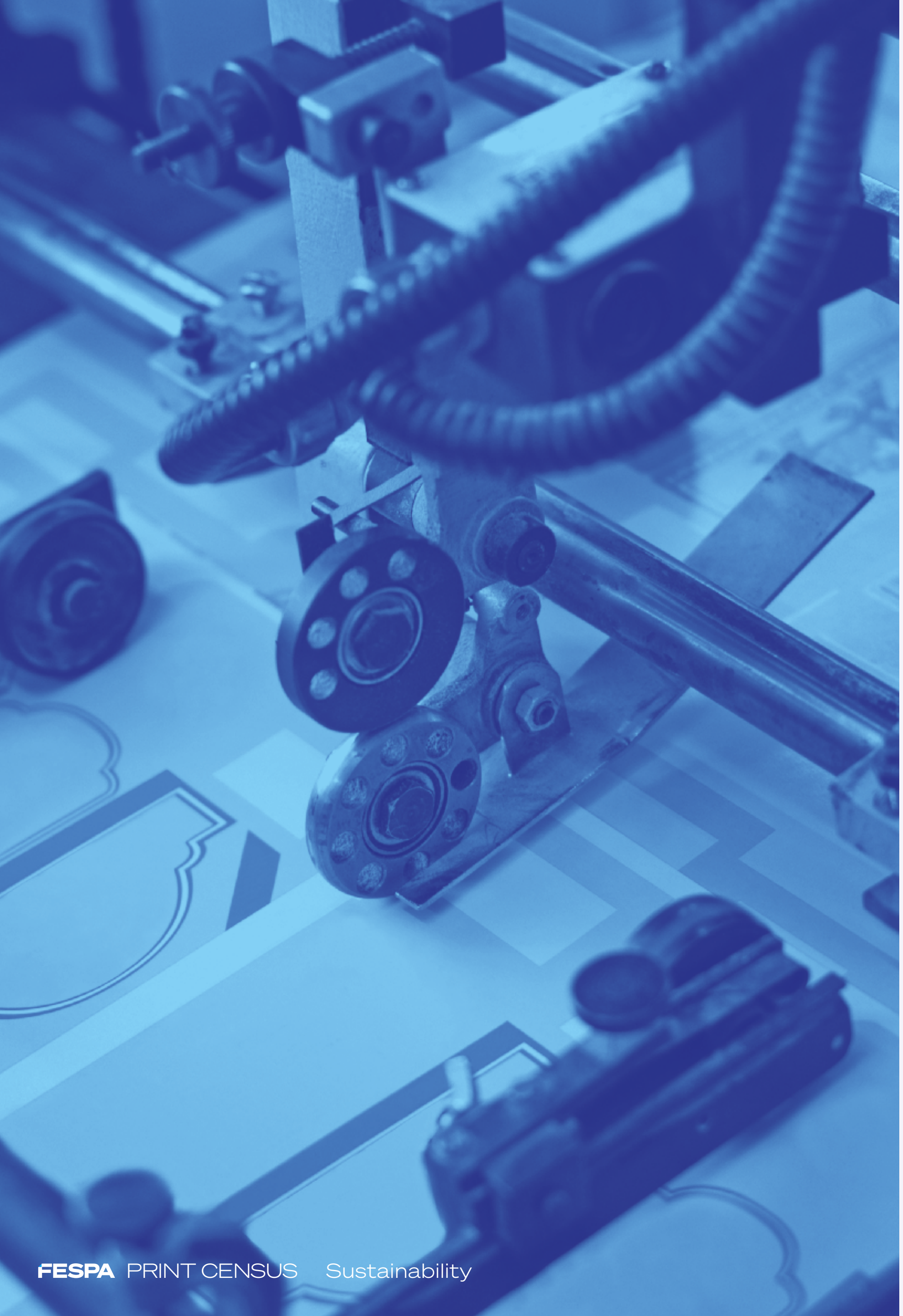
What is the biggest obstacle to offering more sustainable products?



Supply chain disruptions further compound these issues. The COVID-19 pandemic, global raw material shortages, and volatile energy prices have made sourcing sustainable substrates more unpredictable. These issues disproportionately affect small PSPs, who lack the procurement leverage or warehousing capacity to absorb variability. Distributors and dealers must respond with clearer lead time transparency, scalable minimum orders, and stronger local inventory strategies to ensure that sustainable options are practically available.

A number of sustainability regulations are already in place in various parts of the world, and these will only increase as time goes on. Nearly three-quarters of respondents expect sustainability regulations to have a moderate or significant impact on their businesses over the next 5 years.

This projected impact is likely understated. Many dealers and manufacturers outside the EU remain unaware of how quickly brand-led procurement and regulatory frameworks will expand globally. Regulations like the EU's Corporate Sustainability Reporting Directive (CSRD) and Extended Producer Responsibility (EPR) schemes will affect not just entities within Europe but also their entire value chains. This includes manufacturers exporting into the region and PSPs fulfilling orders for global brands. Those who delay preparation risk falling short of supplier qualification thresholds.



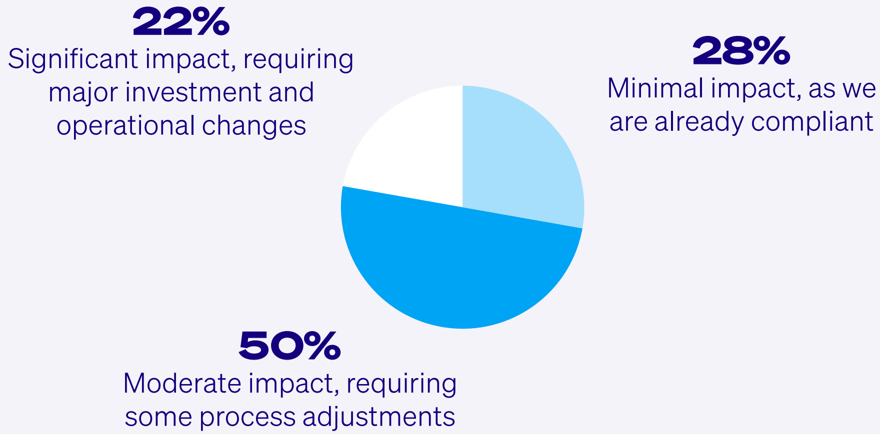
Moreover, micro and small PSPs often do not track regulatory changes unless prompted by a direct client request. Dealers and manufacturers must therefore anticipate this lag and take responsibility for pre-emptive education. This is not just a compliance issue. It is a business continuity concern, as firms that are unprepared may lose access to regulated markets.

In terms of sustainability training/guidance, respondents were evenly split over what they offered. A third were actively educating their customers on sustainability, while another third were only doing so on request. The remaining 33% weren't providing any education.

This fragmented approach limits scale and consistency. Manufacturers and distributors that invest in structured training programs—especially those tailored for SMEs—will help accelerate adoption and build long-term partnerships. Training should go beyond technical features to include compliance literacy, market trends, and value communication strategies. FESPA and its national associations can serve as key intermediaries in distributing this education, particularly in regions where supplier capabilities are limited.

FIGURE 17 **IMPACT OF SUSTAINABILITY REGULATIONS**

How do you see sustainability regulations impacting your business in the next five years?



RECOMMENDATIONS

While sustainability implementation challenges exist, it is an issue that will only grow in importance due to customer demand and ongoing regulations. Sustainability is no longer an optional business consideration. It is becoming a structural factor driven by regulation, procurement policies, and brand equity. Small Print Service Providers (PSPs) that ignore this shift risk being excluded from future value chains. The following recommendations offer structured, actionable guidance that reflects the differing capacities of micro, small, and medium-sized businesses. Here are some recommendations as the industry continues to shift toward increasing eco-friendliness:

PSPs should start small by upgrading to more energy-efficient and low-waste equipment over time. A phased approach can help with ease of implementation.

Micro-businesses should begin with no-cost or low-cost measures such as installing energy monitors, switching to certified inks or substrates, or tracking waste volumes. These steps build operational awareness without requiring capital investment.

Equipment upgrades should be phased only after clear ROI pathways are established, ideally supported by supplier finance programs or incentives.

PSPs can partner with suppliers that offer recycled products, PVC-free substrates, and/or low-VOC inks. Supplier selection must be strategic. PSPs should prioritise partners who provide certified sustainable products (e.g., GREENGUARD, FSC, OEKO-TEX), transparent Life Cycle Assessment (LCA) data, and switching support such as material comparisons or sample kits. This will help PSPs adopt change while minimising commercial risk.

Customers need to be educated on the benefits of sustainable printing, so PSPs should actively promote these advantages with their employees and clients. PSPs should integrate sustainability into sales and marketing. This includes using visible proof points such as eco-labels, customer-facing sustainability summaries, and post-project reporting on material choices or emissions savings. Associations and suppliers should provide training on how to avoid greenwashing while maximising value communication.

Dealers/distributors should offer and promote eco-friendly materials, inks, and equipment. They can also offer financing or other incentives to help PSPs improve their sustainable proposition., and should develop bundled sustainability offerings that combine product, education, and compliance support. This might include starter kits, financing for energy-efficient retrofits, or tools for calculating total cost of ownership. Programs should be tailored for SMEs, not just large enterprise clients.

Manufacturers should consider collaborating with PSPs and dealers/distributors to co-develop more sustainable solutions. They should take a leadership role in simplifying sustainability adoption. This includes creating universal documentation formats (for LCA, recycled content, etc.), supporting third-party audits, and co-developing regionally adapted materials that meet new regulatory requirements. Alignment across the value chain will be essential as procurement frameworks become more prescriptive.

New product introductions should prioritise reduced energy consumption, waste, and emissions to minimise their impact on the environment. Future product innovation must consider not only performance and price, but also energy use, material recovery potential, and compatibility with circular economy standards. Regulatory readiness (e.g., digital product passport compatibility, recyclability disclosures) should be a design priority from the outset.

PSPs must be trained to avoid greenwashing. Misleading or unverifiable claims will increasingly expose businesses to legal and reputational risks. Associations and suppliers should distribute clear guidelines on acceptable language, certification usage, and documentation practices.

Certifications such as ISO 14001, OEKO-TEX, and FSC offer scalable ways to differentiate in increasingly commoditised markets. While certification may seem inaccessible for micro firms, joining supply chains where upstream partners hold these credentials can allow indirect alignment. PSPs should communicate their role in certified processes where possible.

Opinion

According to the results of this year's survey, the printing industry is increasingly recognising the rising importance of sustainability. The 2025 Census confirms that sustainability is no longer a fringe consideration. It is becoming central to how PSPs position themselves commercially, respond to regulatory frameworks, and align with shifting customer expectations. Yet recognition is not enough. The industry's current state shows a clear gap between intent and execution.

For many PSPs, sustainability has become an essential part of their business strategy due to customer expectations, regulatory pressures, and a growing awareness about environmental responsibility. Many PSPs, particularly those with under 50 employees, acknowledge sustainability as important. However, resource constraints, inconsistent demand signals, and lack of internal expertise continue to slow implementation. The danger is that these firms assume regulation will bypass them. In reality, enforcement thresholds are dropping, and indirect exposure through client procurement is accelerating. Firms that fail to prepare may soon find themselves locked out of opportunities, especially in sectors with compliance-driven purchasing like retail, interiors, or corporate branding. Although challenges like cost concerns and limited demand persist, the commitment to using eco-friendly inks, reducing waste, and sourcing sustainable materials shows clear momentum toward greener operations. Current adoption of eco-inks and recycling initiatives reflects the lowest barrier approach. These actions are valuable but insufficient. Few PSPs are investing in energy audits, lifecycle modeling, or full-scope compliance strategies. This will be problematic as clients begin requesting digital traceability, emissions reporting, or third-party assurance.

Dealers/distributors and manufacturers are playing an important role by broadening their sustainable product portfolios and helping customers navigate the path to eco-friendly production. The role of suppliers will be decisive. Many PSPs depend on them not only for materials but for education, documentation, and regulatory interpretation. Suppliers who can provide turnkey compliance support and clear value comparisons will secure competitive advantage. Conversely, those without transparent sustainability data or customer guidance will lose relevance. As sustainability regulations continue to expand on a global basis, proactive companies will invest early in education, transparency, and measurable results to gain a competitive edge. Regulations like the EU's CSRD, DPP, and EPR will shape global procurement even for PSPs located outside Europe. These frameworks are setting new expectations for data granularity, material transparency, and recyclability. Companies that treat sustainability as a long-term operational discipline, rather than a marketing message, will be better equipped to manage this complexity and benefit from it.

Moving forward, sustainability in print is expected to become an expectation rather than just a competitive differentiator. Print buyers are shifting from asking "is this sustainable?" to assuming it must be. This mindset shift transforms sustainability from an option to a requirement. As the baseline rises, differentiation will come from how well PSPs integrate sustainability into quality, service, and accountability. Certification, traceability, and lifecycle thinking will become part of the value proposition. Collaboration across the value chain will be essential in driving measurable progress. By embracing the sustainability opportunity, industry players can help strengthen the broader perception of print as a responsible and resilient medium in today's rapidly changing world. Cross-industry alignment is now critical. No single actor-PSP, distributor, or manufacturer-can meet regulatory and market demands alone. FESPA's Sustainability Spotlight, national association programs, and FESPA Direct membership can all help close capability gaps, particularly in underserved regions. Equally important is a forward-looking stance. Emerging areas such as digital product passports, materials traceability, and Extended Producer Responsibility will define the next wave of requirements. Now is the time to prepare.

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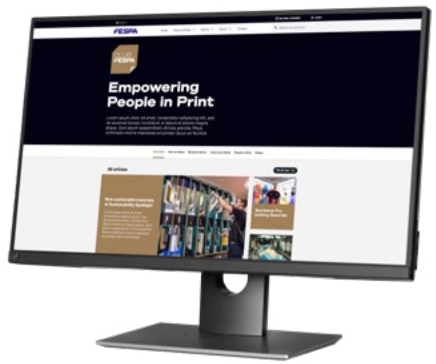

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