FESPA
profit for purpose

PRINT CENSUS
2023

WELCOME...

The FESPA Print Census is the largest worldwide print research project which collects and shares market intelligence.

Graeme Richardson-Locke

Head of Associations and Technical Lead, FESPA

The Census was introduced back in 2015 and continues to be updated with the aim to share an up-to-date view of market conditions as experienced by speciality printers which in turn helps printers sustain and grow their business.

It is designed to share insightful findings to help printers make informed decisions. Our research focuses on how these businesses view the future, which opportunities they are adopting, what challenges they face, and how they are planning for growth and development.

The data is collected with the support of FESPA's Association network and analysed in partnership with InfoTrends, a division of Keypoint Intelligence.

This edition of the FESPA Print Census is the largest one yet, with a total of 1,778 responses from over 120 countries with respondents including sign and display businesses, screen printers, commercial printers, textile and garment printing specialists and packaging printers. This year, we have also included additional questions around Sustainability and Personalisation which are areas of particular interest.

The data shows a positive outlook with a forward-looking view to satisfy new customer demands. The survey shows a keen interest in print buyers requesting environmentally friendly products, practices, or both, and a strong demand for faster turnarounds, more versioning/personalisation, and shorter print runs as you will see from our Key Trends Report.

As in 2018, we have distilled six key trends from the data, which the research shows to be shaping the industry over the next few years. Read on to discover these trends and some of the stand-out statistics from the Census. They offer valuable insight into the fast-changing world of speciality print in 2023 and beyond.

Christophe Aussenac

FESPA President

As FESPA's President and a print business owner I want to extend our gratitude to all who have contributed to this research. Our Association members and their communities along with the wider participants have provided insight that is useful to us all.

Understanding the trends affecting our futures informs where we find business opportunities and how we can mitigate risk. It is clear to me that increased transparency and accountability of our social and environmental impacts goes hand-in-hand with wealth generation.

We hope you find the results useful and informative.

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EXECUTIVE SUMMARY

WORLD

The FESPA print census is an industry research project that helps print service providers and vendors understand market dynamics in key industry segments, including signage & display, graphics, textile, and industrial.

With nearly 1,800 respondents from 120 countries, this survey continues a research partnership between FESPA and Keypoint Intelligence that began back in 2007. About 18% of our respondents are already FESPA members.

The respondents from the top 9 countries represent nearly half of our total respondent pool. The greatest volume of these respondents were from European countries although significant responses came from Latin America.

The FESPA community is diverse and growing, and this study was designed to explore service providers in these segments. Survey respondents represented a broad range of graphic arts and industrial segments whose primary business revolves around printing. The greatest percentage of survey participants were digital printing specialists within the graphics industry, but signage and textile businesses were well-represented too.

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FIGURE 1
FESPA PRINT CENSUS RESPONDENTS

FESPA Print Census Respondents
(Top 20 Countries)

KEY HIGHLIGHTS

Overall

The FESPA Print Census has consistently grown and includes a wide variety of industry segments. Although some of the key trends that we observed are common across all industry segments, others are more industry specific. Here are some of the major trends that we observed during this year's survey:

- **Digital printing investments are accelerating:** This is primarily due to a focus on enhancing image quality, reducing costs, and a desire to grow by entering new market segments.

- **Investments in environmentally friendly products and processes are on the rise:** The demand among print customers for eco-friendly products only continues to grow. Specifically, 72% of print buyers are seeking products that are environmentally friendly, and produced using sustainable practices, or both. Despite the fact that these types of investments can be costly, 70% of the respondents were able to maintain their current pricing without experiencing any negative impact on sales.

- **Customer demands are driving the market:** The industry is being propelled by the increasing desire for quicker turnaround times, more personalization and versioning options, and shorter print runs. To meet these demands, Print Service Provider(s) are turning to technology that can streamline production and provide application flexibility for short and long runs.

- **Print Service Provider(s) are cautiously optimistic about the future:** The majority of survey respondents in the survey expressed a high level of optimism regarding the future of their business, even though they only felt moderately optimistic about the industries they cater to. This perspective is understandable since 51% of those surveyed serve both B2B and B2C structures. Fortunately, printers have a broad and varied client base covering all verticals, providing stability in a volatile market.

Graphics and Signage

- About 70% of graphics/signage firms that own screen-printing equipment also own wide format equipment. Another 15% plan to invest soon.

- We are seeing a continued shift in durable ink use from solvent-based technology to UV curable, latex, and sublimation.

- Common sign & display applications such as banners, signs, and billboards remain a strong base for the business today. Applications that will likely represent areas of growth in the future include interior décor, point-of-purchase displays, and vehicle graphics.

- Over two-thirds (68%) of graphics/signage respondents consider the exploration of new applications that appeal to new markets as extremely important to the future of their businesses.

Textile/Direct-to-Garment

- Current and future applications for textile printers are focused on garments where the benefits of digital printing (e.g., time to market, creativity, and customisation) are driving continued adoption. About 45% of textile respondents already had digital direct-to-garment equipment and another 29% were planning to invest.

- The most commonly owned textile printing equipment included wide format sublimation inkjet transfer printers, wide format pigment inkjet printers, and screen-printing equipment.

- A strong majority of textile respondents reported regularly producing textiles for apparel. Textiles for home design or white goods were also common.

- The most popular direct-to-garment equipment among textile respondents included heat transfer presses (61%) and commercial DTG printers (48%).

Industrial

- About a third of industrial respondents were already using screen-printing equipment for industrial print applications at their companies. Another 14% were planning to invest.

- Among industrial respondents that owned screen-printing equipment, the most commonly printed items included control panels (38%), nameplates (33%), and industrial product marking (31%).

- 63% of industrial respondents with screen-printing equipment also owned wide format equipment, while 14% were planning to invest in wide format in the near term.