



**State of the Decorated
Apparel Industry Report
Winter 2026**
EXECUTIVE SUMMARY



Sponsored by DuPont™ Artistri®

Produced by the PRINTING United Alliance for its members.

«DUPONT»
Artistri.

WINTER 2026

Staying on top of industry trends is essential to your success.

Throughout the year, PRINTING United Alliance's research team creates top-notch reports for the industry and works with consultancies to conduct commissioned research.

PRINTING United Alliance members get unlimited access to the resulting reports that reflect the scope of the printing industry.

Visit: <https://www.printing.org/library/business-excellence/economics-forecasting/industry-reports>

If you have any questions, please contact researchteam@printing.org.

WHO WE ARE



DuPont™ Artistri® Digital Printing Solutions combines DuPont proprietary dispersions, polymers and ink formulations for the most innovative digital inks in advanced printing. From the brightest and richest colors to custom formulations, Artistri® provides color consistency across production runs and overtime. With 35+ years of history in technology and innovation, DuPont™ Artistri® delivers an innovative portfolio of products to bring your colors to life.

For Apparel Decoration, DuPont™ Artistri® offers a complete DTF printing solution featuring vibrant P1600 inks, premium DTF-120 film, and the breakthrough Jettable Adhesive, a powder-free innovation that streamlines workflow and enhances print quality.”

For more information, please [Contact DuPont™ Artistri® DuPont](#)



Alliance Insights, formerly NAPCO Research, is the premier source of market intelligence, strategic consulting, and business development services for the printing, packaging, publishing, marketing, retail, nonprofit, and promotional products industries. Now operating as part of PRINTING United Alliance, we continue to deliver data-driven insights, actionable research, and expert analysis to help organizations make informed decisions and drive growth. With access to a highly engaged audience of 550,000+ professionals, Alliance Insights provides unparalleled support for companies seeking to strengthen market positioning, amplify thought leadership, and unlock new opportunities.

EXECUTIVE SUMMARY

The PRINTING United Alliance's *State of the Decorated Apparel Industry Report, Winter 2026* (SODA), provides an overview of the current business conditions for apparel decorators. The report is based on responses from 68 participating companies and highlights the key challenges and opportunities affecting the industry.

The participating companies represent a wide range of business sizes. Annual sales from all revenue sources range from less than \$250,000 to more than \$20 million. The respondents are geographically diverse, with companies located across the United States and one respondent from Canada. Most participating companies use multiple in-house decoration technologies in their operations.

The report analyzes several important industry indicators. These include trends in sales, operating cost inflation, prices, and profitability during the first three quarters of 2025, as well as expectations for business conditions in 2026. It also examines topics such as the impact of tariffs, capital investment plans and objectives, major business risks, print-on-demand sales and profitability, and sustainability practices, including their benefits and challenges.

PRINTING United Alliance members can download the *State of the Decorated Apparel Industry Report, Winter 2026*, from [here](#).

SAMPLE FINDINGS

The majority of SODA participants report continued pressure from sluggish sales growth, rising operating costs, and profitability that remains flat at best. Figures 1 through 3 summarize results through the first three calendar quarters of 2025 for all apparel decorators surveyed. Notice, in particular:

Growth was limited and skewed. Sales increased 2.0% on average, growing for 39.7% but flat (26.5%) or down (33.8%) for 60.4%. Cost inflation generally outpaced price increases. On average, operating costs rose 8.1% due solely to inflationary pressures (excluding changes in production volume, product mix, or productivity), while average selling prices increased by 7.1%. Nearly 81.0% of surveyed apparel decorators reported higher costs driven by inflation; however, only 73.5% were able to raise prices, as intense competition limited pricing power. Further underscoring these constraints, 25.0% of respondents held prices steady, and approximately 1.5% lowered prices in an effort to maintain market share (Figure 1).

Margins under pressure. Pre-tax profitability (pre-tax profits as a percentage of sales) increased for 26.7%, significantly less than the 73.3% for whom profitability was flat (45.0%) or down (28.3%) and the 39.7% for whom sales increased, underscoring the difficulty of getting growth from the top line to the bottom line.

Figure 1: Key Business Indicators

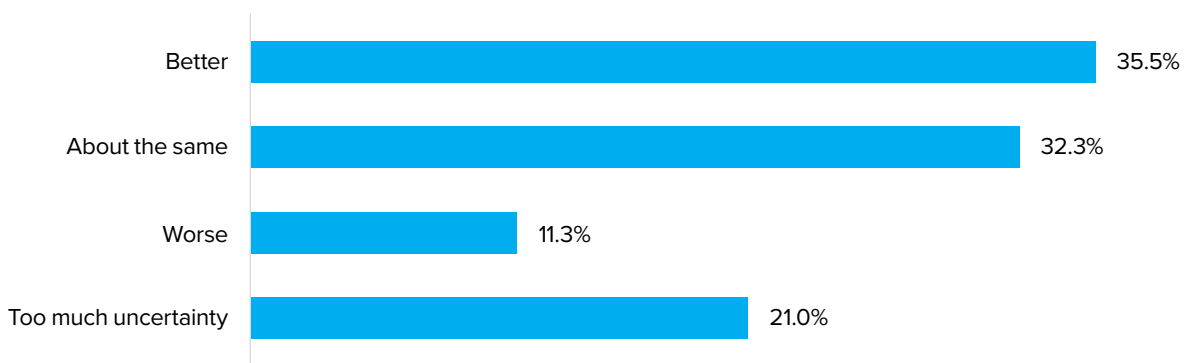
Q: How sales (all sources), operating cost inflation, and prices for the first three quarters of 2025 compare with year-earlier.

Key Business Indicators	First Three Quarters 2025			
	Higher	Same	Lower	Average
Sales (all sources)	39.7%	26.5%	33.8%	2.0%
Operating cost inflation	80.9%	19.1%	0.0%	8.1%
Prices	73.5%	25.0%	1.5%	7.1%

Expectations for overall business conditions are mixed, reflecting both cautious optimism and elevated uncertainty. More than one-third of respondents (35.5%) expect conditions to improve in 2026, while a similar share (32.3%) anticipate business conditions will remain about the same. A smaller portion (11.3%) expect conditions to worsen. Notably, 21.0% report that there is too much uncertainty to form a clear outlook, underscoring ongoing volatility and unpredictability in the operating environment (Figure 2).

Figure 2: Business Expectations

Q: How do you expect business conditions in 2026 to compare with conditions in 2025?



TOP PRIORITIES FOR 2026

Looking ahead to 2026, participants shared a clear and consistent set of top priorities, centered on improving efficiency, controlling costs, and strengthening financial performance. The most frequently cited priority is productivity, identified by 74.2% of respondents, followed closely by cost control (72.6%), reflecting ongoing pressure from inflation, labor challenges, and tight margins. Growth-related initiatives also feature prominently among participants' priorities. Marketing and brand-building — including promoting capabilities and articulating customer value — are priorities for 50.0% of respondents. Nearly half (48.4%) plan to invest in automation, while 45.2% aim to increase production speed and throughput, reinforcing the industry's focus on operational efficiency.

Figure 3: Top Priorities for 2026

Q: What are your top priorities for 2026?

	Percentage
Productivity	74.2%
Cost control	72.6%
Marketing. Build our brand, promote full range of our capabilities, promote how clients benefit from partnering with us, etc.	50.0%
Automation	48.4%
Increase production speed/throughput	45.2%

BIGGEST CONCERNS:

As industry heads into 2026, apparel decorators' concerns are dominated by cost pressures and economic uncertainty. The most frequently cited issues are rising labor costs and the overall economy/business conditions (both 51.6%). Nearly half of respondents are concerned about rising substrate costs and maintaining profitability (both 48.4%), while 45.2% cite challenges related to cash flow and rising ink or toner costs.

Figure 4: Top Concerns.

Q: What concerns you most as we head toward 2026?

	Percentage
Rising labor costs	51.6%
The economy/overall business conditions	51.6%
Rising substrate costs	48.4%
Maintaining profitability	48.4%
Maintaining healthy cash/working capital balances	45.2%

