



PRINT BUSINESS OUTLOOK SERIES

Commercial Printing Report Summer 2025

The Effects of Tariffs on the Printing Industry

EXECUTIVE SUMMARY



Sponsored by Canon U.S.A., Inc. **Canon**

Produced by the PRINTING United Alliance and NAPCO Research for its members.

SUMMER 2025

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Executive Summary

The PRINTING United Alliance *Commercial Printing Report, Summer 2025* summarizes insights from 102 commercial printing companies that participated in the first-quarter State of the Industry Survey. These businesses, with annual sales ranging from less than \$500,000 to more than \$500 million, provide a broad snapshot of the industry. The survey examines the effects of tariffs on the U.S. commercial printing sector, revealing their wide-ranging and disruptive impact on costs, profitability, supply chains, and business strategy.

It highlights how commercial printers are grappling with higher operating expenses, tighter profit margins, and slower sales growth. Key production materials—such as paper, plates, aluminum, and ink—are especially vulnerable to cost pressures, underscoring how deeply tariffs are reshaping the industry's financial and operational landscape.

PRINTING United Alliance members can download the *Commercial Printing Report, Summer 2025* [here](#).



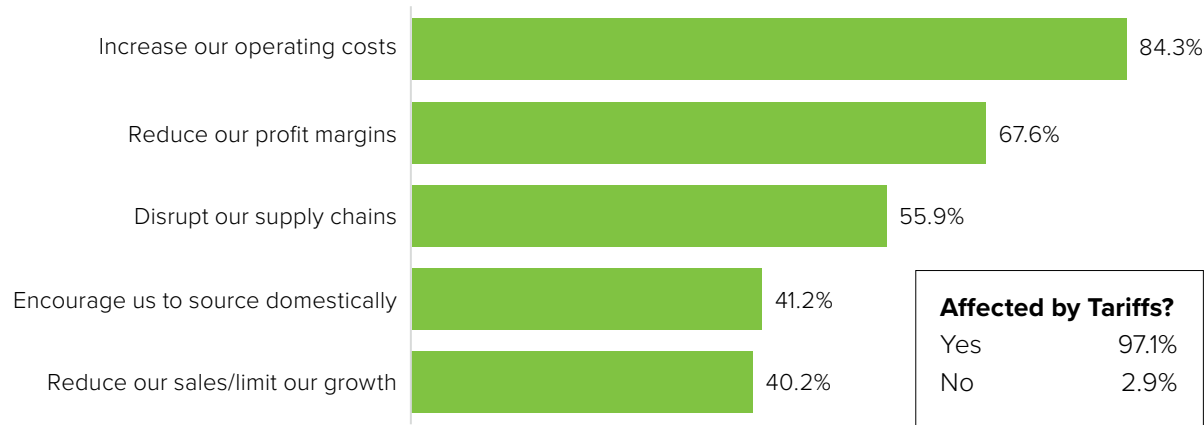
Canon U.S.A., Inc. is a leader in digital imaging and printing solutions with one of the broadest portfolios in the industry, offering solutions such as digital presses, production ink-jet presses, wide-format printers, workflow solutions and professional services. With approximately \$28.5 billion in global revenue, its parent company, Canon Inc., as of 2024 has ranked in the top-10 for U.S. patents granted for 41 consecutive years†. Canon U.S.A. is dedicated to its Kyosei philosophy of social and environmental responsibility.

SAMPLE RESULTS

Tariffs are pressuring commercial printers from every angle. Among surveyed companies, 97.1% report being affected—or expecting to be affected—by tariff increases. The majority anticipate direct financial strain: 84.3% expect higher operating costs, 67.6% foresee reduced profit margins, and 40.2% predict slower sales growth. In addition, 55.9% anticipate supply chain disruptions, with more than two-fifths planning to expand domestic sourcing as a strategic response (Figure 1).

Figure 1: The Effects of Tariffs

Q: How are (or do you expect) higher tariffs to affect your business?



While tariffs bring undeniable challenges, some commercial printers also see them as catalysts for long-term opportunity. More than one in five companies (23.3%) believe the changes could ultimately strengthen the industry by encouraging greater efficiency, rebuilding domestic manufacturing, and reducing reliance on foreign suppliers (Figure 2).

Figure 2: Positive Effects of Tariffs

Q: Will the tariffs have any positive effects on your company or industry?

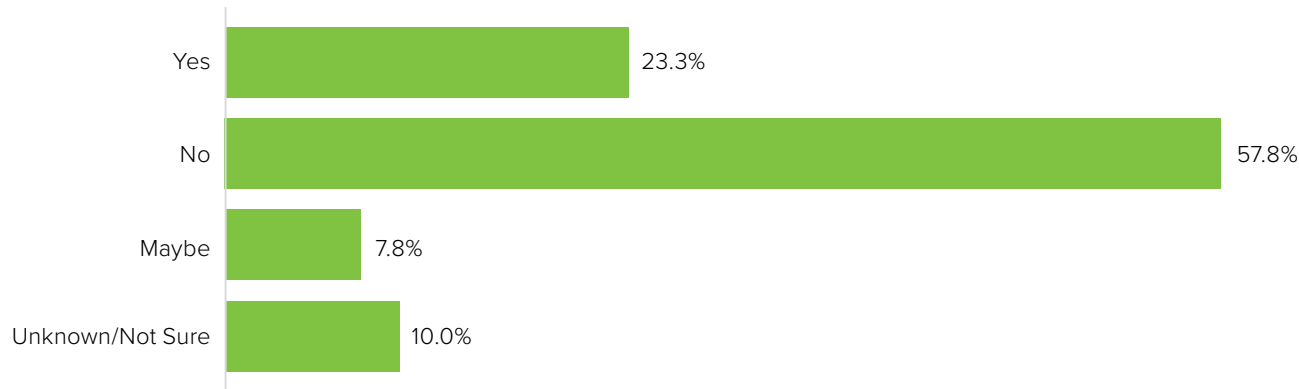


Figure 3 shows that raising prices is the primary strategy for managing tariff-related cost increases, with 94.8% of commercial printers surveyed planning to pass at least some of the added expense on to customers. More than half (57.7%) are also looking to increase productivity and efficiency to offset costs, though most expect these gains to be limited. At the same time, 71.1% anticipate absorbing part of the expense directly, accepting lower profit margins in order to protect market share.

Figure 3: Expected Tariff Offsets

Q: An increase in tariffs, like any increase in costs, can be offset by raising prices, increasing productivity, absorbing the increase as lower margins to maintain market share, or some combination of the three. How do you think it will play out for your company?

Action	Planning
Offset by raising prices	94.8%
Offset by increasing productivity/efficiency	57.7%
Absorb to maintain market share	71.1%

The *PRINTING United Alliance Commercial Printing Report, Summer 2025* covers the materials most affected by tariffs, how surveyed companies are adjusting to rising costs, the broader outlook for the American economy, and three practical steps for turning tariff-driven disruption and uncertainty into opportunities rather than threats.

PRINTING United Alliance members can download the *Commercial Printing Report, Summer 2025* [here](#).

WHO WE ARE



PRINTING United Alliance is North America's most comprehensive member-based printing and graphic arts association, comprised of the industry's vast communities. The Alliance serves industry professionals and its members with preeminent education and training via iLEARNING+, workshops, events, research, government and legislative representation, safety, and environmental sustainability guidance, as well as resources from our leading media brands – *Printing Impressions*, *Packaging Impressions*, *Wide-format Impressions*, *In-plant Impressions*, and *Apparelist*. A division of PRINTING United Alliance, Idealliance is a global leader in standards training and certification for printing and graphic arts operations across the entire industry supply chain.

PRINTING United Alliance also produces the PRINTING United Expo, the most influential days in printing. The expansive display of technology and supplies, education, programming, and services are showcased to the industry at large and represents all market segments in one easily accessed place.

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