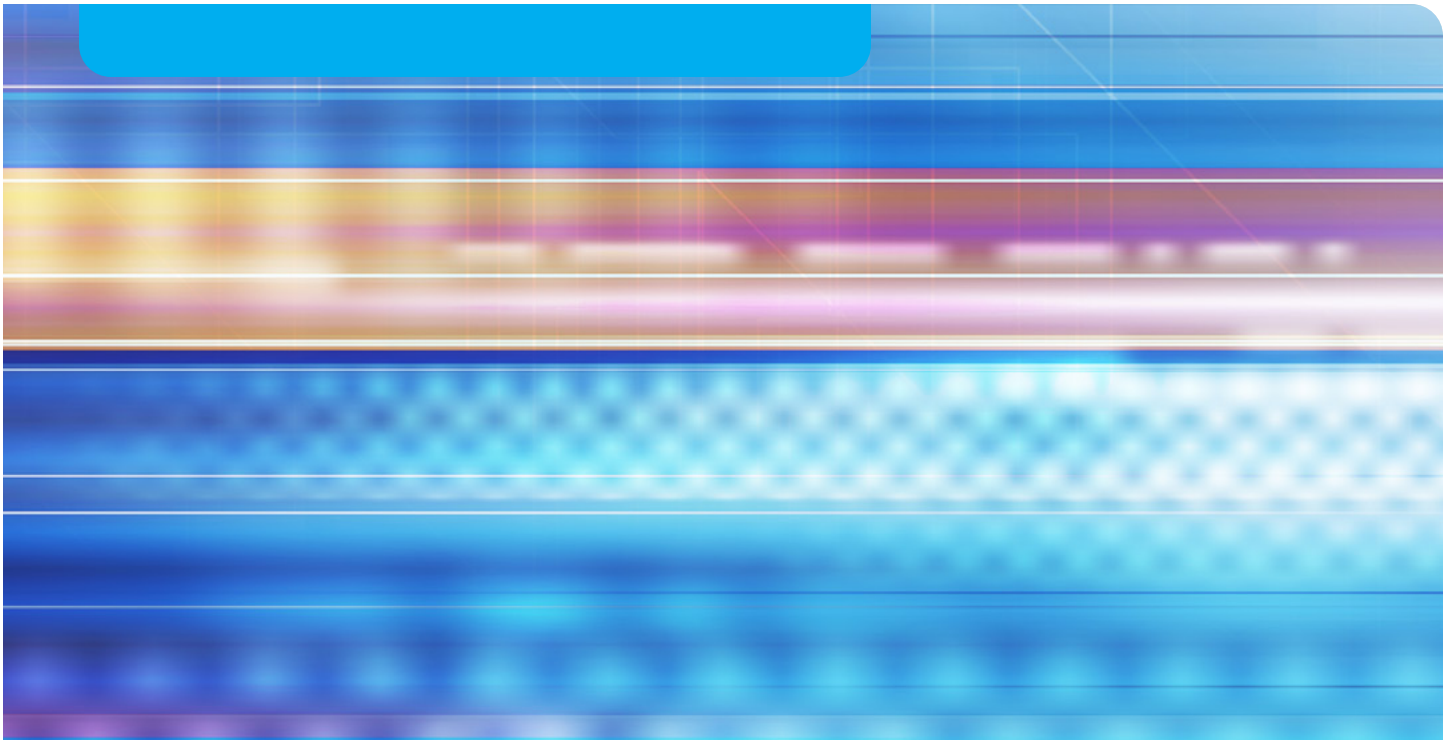


Wide-format Printing Report

EXECUTIVE SUMMARY

ALLIANCE INSIGHTS
RESEARCH • ANALYSIS • ECONOMICS



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

Produced by the PRINTING United Alliance for its members.

Spring 2026

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

WHO WE ARE

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.

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.

Table of Contents

Key Business Trends 5

Expected Business Conditions 7

Client Buying Trends 7

Services in Addition to Printing 8

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Each quarter PRINTING United Alliance conducts a State of the Industry Survey to assess current conditions and emerging trends across the printing sector. The *Wide-Format Printing Report, Spring 2026* presents findings from 49 participants in the February/March 2026 survey who offer wide-format printing as their primary service. (It does not include 114 participants, primarily commercial printers, who offer wide-format graphics as a secondary service.)

The report covers how sales, costs, pricing, and profitability are trending, current and expected business conditions, client purchasing habits, capital investment rates, and services in addition to printing.

Contributors, who represent a diverse cross-section of the wide-format industry, have annual sales (all sources) ranging from less than $1 million to more than $100 million and offer a wide range of wide-format applications, most commonly banners, soft signage, window graphics, and dimensional signage.

PRINTING United Alliance members can download the *Wide-Format Printing Report, Spring 2026* here.

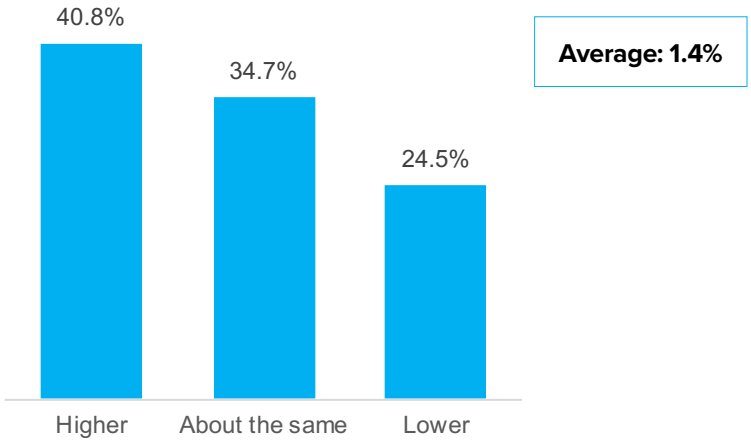
KEY BUSINESS TRENDS

Full-year 2025 results reflect a subdued wide-format printing market. Among all companies surveyed:

Sales increased just 1.4% on average, with 40.8% reporting growth and 59.2% reporting sales were flat (34.7%) or down (24.5%) (**Figure 1**).

Figure 1: **Sales Performance, Full-Year 2025**

How did your 2025 sales (all sources) compare with year-earlier sales?

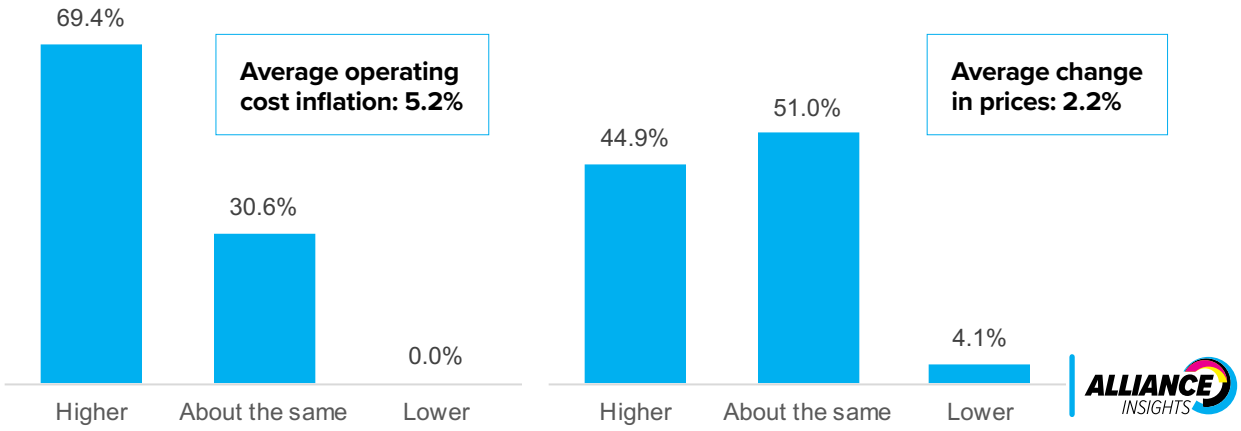


Operating cost inflation averaged 5.2%, continuing to pressure profitability in generally soft, price-sensitive markets. The majority of firms (69.4%) reported operating costs rose strictly because of inflation (**Figure 2**).

Prices increased by an average of 2.2%. Decisions around pricing were challenging, as firms balanced the need to offset rising costs with maintaining market share. Overall, 44.9% of firms increased prices, 51.0% held prices steady, and 4.1% decreased prices.

Figure 2: **Operating Cost Inflation and Prices**

How per-unit operating costs (operating cost inflation) and prices compared with year-earlier levels.



Pre-tax profitability, pressured by soft sales, rising costs, and limited pricing power, increased for just 28.6%, was unchanged for 32.7%, and declined for 38.8% (**Figure 3**).

Figure 3: **Pre-Tax Profitability Trends**

How did your full-year 2025 pre-tax profitability (pre-tax profits as a percentage of sales) compare with year-earlier profitability?

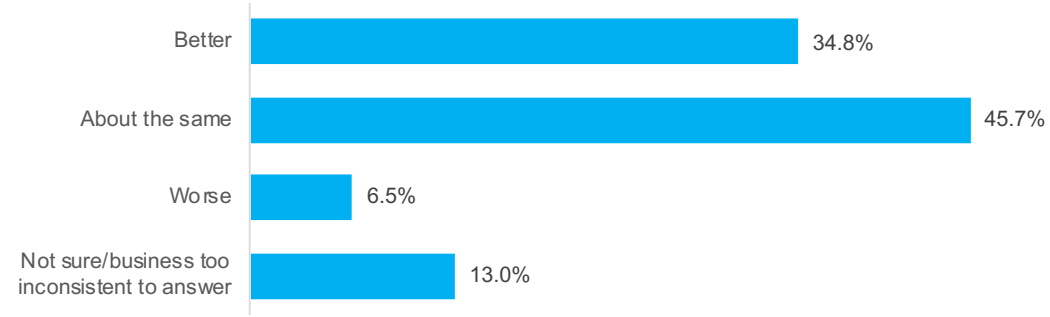


EXPECTED BUSINESS CONDITIONS

Nearly 46.0% of our research panel do not expect business conditions to change meaningfully over the next three months. Significantly more expect conditions to improve, 34.8%, than expect conditions to deteriorate, 6.5%, while 13.0% remain uncertain about the outlook (**Figure 4**).

Figure 4: **Business Conditions Outlook Next Three Months**

Apart from seasonal variation, how do you expect business conditions over the next three months to compare with current conditions?

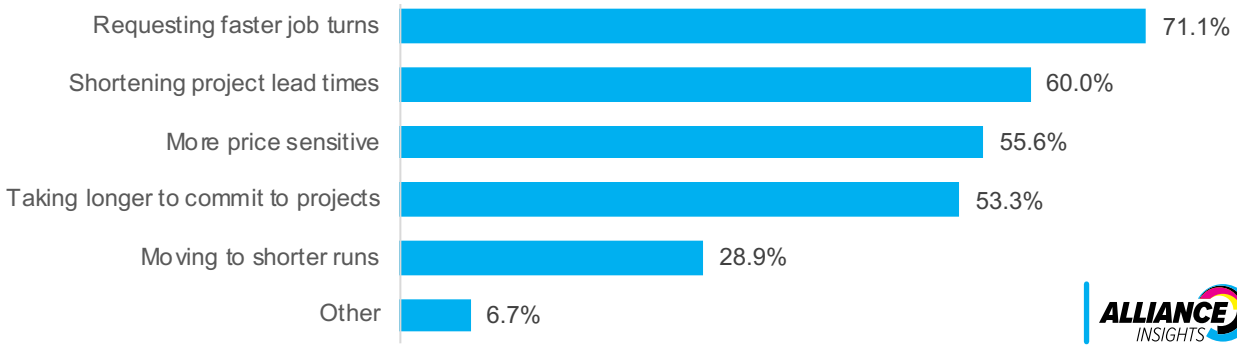


CLIENT BUYING TRENDS

The majority of wide-format printers surveyed report clients are delaying projects as uncertainty engulfs their markets and the American economy yet still expect faster job turns. One describes the challenge as “how quickly we can get the job done while maintaining quality and pricing.” Many are responding by “building automation routines into every part of our business” (**Figure 5**).

Figure 5: **Client Behavior and Buying Patterns**

For your clients in general which of the following are true? Select all that apply.



SERVICES IN ADDITION TO PRINTING

More than one-third (35.4%) of wide-format printers surveyed have added services in addition to printing. Fulfillment is by far the most frequently added print complement. Others include mailing, concept and design, installation, recycling, and "social media guidance, photography, and videography" (**Figure 6**).

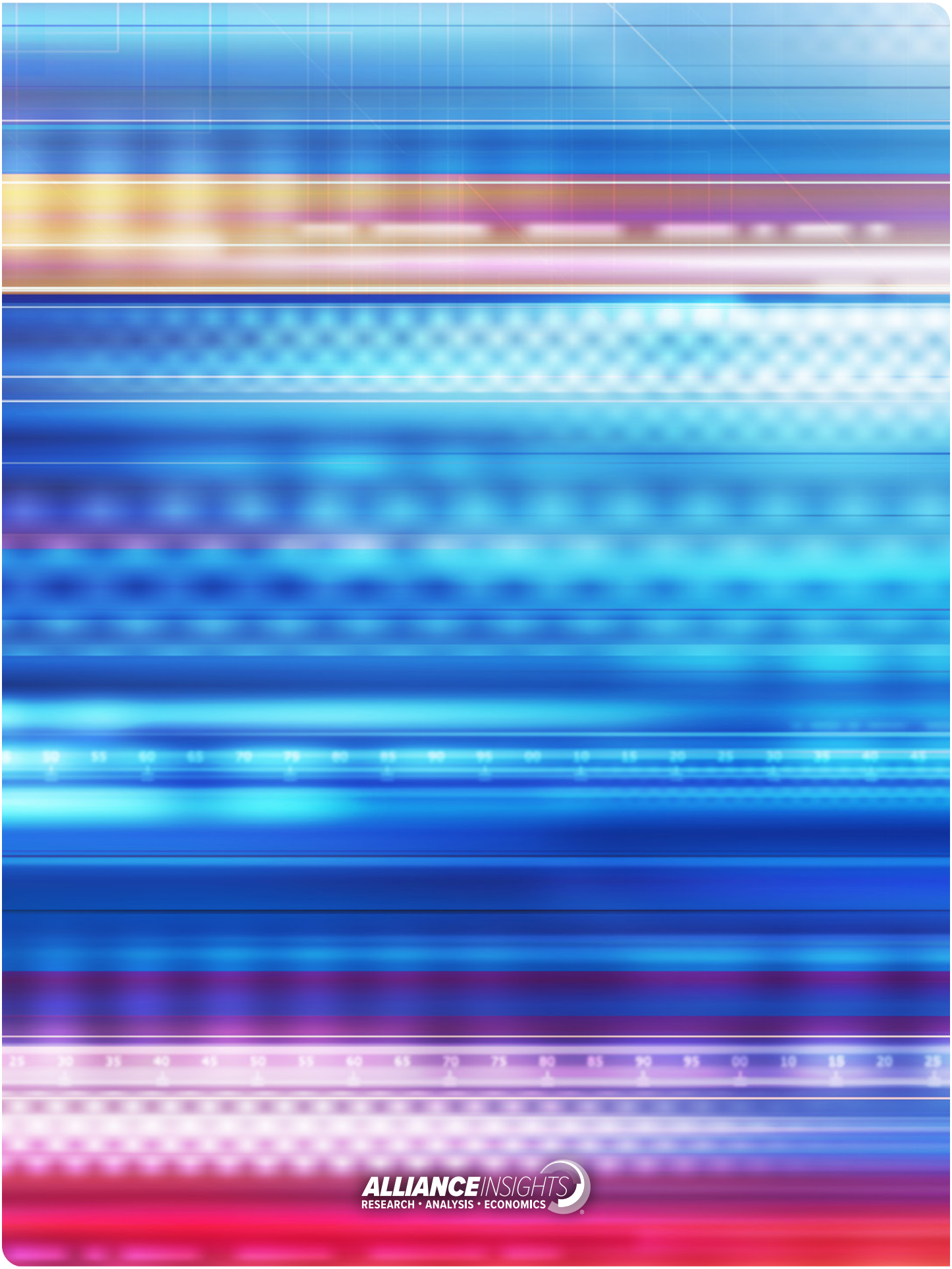
Figure 6: **Services Beyond Printing**

If you offer services in addition to printing, please indicate which services.

Service Offering	Offering
Fulfillment	70.6%
Mailing	23.5%
Industry-specific compliance regulatory services (medical, financial, food/beverage, pharmaceutical, etc.)	17.6%
Multi-media, data-driven marketing programs (program design, targeting/personalization, results tracking, etc.)	5.9%
Others	64.7%

The full report examines several other important topics shaping the wide-format printing market, including current and expected business conditions, client demand and buying patterns, value-added services, diversification beyond wide-format printing, capital investment trends, and broader industry challenges.

PRINTING United Alliance members can download the PBOS *Wide-format Printing Report, Spring 2026* here.


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