

Monthly Print Market Update

January, 2026



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October Printing Shipments More Treat Than Trick - After a pretty flat stretch for most of the year, shipments rose from August to October, hitting a yearly high in October of \$8.00 billion. Most of 2025 certainly had its challenges economically: the tariffopalooza did not help matters (although that has, fingers crossed, kind of stabilized), and the employment situation had looked a little concerning, but seems OK. 2025 had not been as good as 2024, at least up to the fall—we're nervous about November and December—but it looks like we are making up some ground, and October shipments were on par with 2023. So there's that.

Becoming California's 'Printer of Choice' - Visiting California's Office of State Publishing (OSP) can be an overwhelming experience. Unlike the more modest facilities of a typical in-plant, OSP's 128,000-sq.-ft. main plant rivals most commercial printers in size and scope.

The country's second largest in-plant, behind only the U.S. Government Publishing Office in Washington, D.C., OSP is one of the few in-plants with a web offset press: an eight-color Harris M-1000B. The press consumes an average of 20,000 lbs. of paper each day to churn out millions of voter information guides, driver's license handbooks, tax forms, and other essential documents.

If you're looking to do business with the State of CA, beware! This is a very large operation and aggressively expanding.

New Magazine Paper Redefines Printing - It's not every day that a new printing paper is launched, but Holmen has introduced a groundbreaking magazine paper that is whiter than conventional alternatives, delivering sharper photographic reproduction along with low carbon emissions.

Holmen Aspect is an exceptionally white, wood-containing paper designed to set new standards in magazine printing. Developed for the demands of a transforming market, it ensures sharp visual reproduction and an appealing page thickness even with a low gsm weight.

I think this falls more under the heading of an "Advertorial" but it does make you aware of a new sheet available for high-end Print, as well as showing that innovation continues, even in the analog parts of our industry.

The Future is Bright for Commercial Printing - This is no ordinary time for commercial printing. Extreme uncertainty created by no-one-knows-what's-next tariff policies has dampened sales, inflated operating costs, and squeezed profit margins across the industry. Meanwhile, transformative technologies such as artificial intelligence (AI), the Internet of Things, and smart robotics redefine what's possible and widen the gap between top performers and everyone else.

Results from the PRINTING United Alliance State of the Industry Survey (SOI) show how challenging business conditions have been for the 83 commercial printers who participated. Through the first three quarters of 2025 and on average, sales increased just 0.3%, operating cost inflation ran ahead of price increases 3.9% to 2.1%, real (inflation-adjusted) sales, a measure of production, declined 1.8%, and

pre-tax profitability was flat or down for 72.3% of respondents. Conditions are described as “troubled waters, with tariffs and rising costs all over the place,” and “confusion and economic uncertainty, which are causing clients to delay or defer projects and reduce run size.”

It’s always good to hear some positive news from someone who has a view of the entire industry. This article also provides some insights to how your peers view the business landscape.

FASTSIGNS® Marks a Decade of Dominance, Ranking No. 1 in Category on Entrepreneur Magazine’s Franchise 500® List for 10th Consecutive Year - FASTSIGNS® Marks a Decade of Dominance, Ranking No. 1 in Category on Entrepreneur Magazine’s Franchise 500® List for 10th Consecutive Year.

Well, this is obviously a very well run Franchise system, but having the wind-at-your-back in fast growing business vertical doesn’t hurt either.

A Wide-format SWOT for 2026 - One of the most ubiquitous tools in the business world is the SWOT analysis — Strengths, Weaknesses, Opportunities, and Threats. It’s a quick way to break things down and have a clear idea of where the business is doing well — and where there might be room for improvement.

As 2026 gets into full swing and wide-format producers start planning for how to grow in the coming months, we asked several owners all in different phases of their wide-format journey — and in different regions of the U.S. — to SWOT the wide-format segment .

A classic and powerful business activity. This always brings perspective from an internally driven day-to-day running the business activity to how good are we really?

Recap and Forecast: State of M&A in the Commercial Printing Segment - As we reflect on the past year, which was a healthy one overall for mergers and acquisitions in the printing industry, it’s a good moment to assess what drove the activity in 2025 and what’s likely to carry the momentum forward into 2026.

The industry’s two principal segments — packaging and commercial printing — have different financial parameters. But the macroeconomic trends underpinning them are the same, and those forces remain encouraging for buyers and sellers alike.

I thought this was certainly appropriate considering your transaction last month. A couple of drivers mentioned in enhanced valuations are services beyond just print, such as kitting and web order entry; which I am sure helped drive your valuation going into the acquisition.

Sign Manufacturing Establishments—2010–2022 Sign Manufacturing Establishments—2010–2022 According to County Business Patterns, in 2010, there were 5,824 establishments in NAICS 33995 (Sign Manufacturing). This NAICS category tumbled in the wake of the Great Recession, ultimately climbing

back up to 5,865 establishments in 2019, but dipping a little in 2020, and then back up to an all-time high of 5,910 in 2022. In macro news: Q3 GDP grew at an annualized 4.4%.

If you plot the twists and turns of the economy over the past 20 years, you will see strong correlation between the performance of the economy and sign shops. It makes sense, as poor business leads to less signage needs and promotional activities.

CJK Group Acquires North American Logistics and Supply Chain Services Company - CJK Group, Inc. announced the completion of its acquisition of substantially all of the assets of WLX|WLE (doing business as WLX and Western Logistics Express), from the R&R Express family of companies. Headquartered in Kansas City, Missouri, WLX|WLE is a leading provider of full-service logistics and transportation solutions serving customers throughout the United States, Canada, and Mexico.

I included this article because it shows that smart Printers realize that just “getting the job out the door” doesn’t finish the job, which of course you know from your logistics business. I also included it because I was at an event at the NRF show in NYC and met the head of Print procurement, who has a team of 7 assisting him with procuring all the Print related products needed for 18 Print Centers across the US, as well as all the Office Print and Paper....he does a good deal of work with you and said that your **Logistics arm is stunning; 2nd only to Amazon**. Nice to hear when such an impressive and massive customer gives such high praise.

Factoring Time and Cost Savings into the Finishing Equation - Globally, according to Grandview Research, the large-format print market is projected to grow from \$9.11 billion in 2023 to \$12.70 billion by 2030, at a compound annual growth rate (CAGR) of 5%. North America currently leads the market with a 34.4% share, with the United States alone representing nearly a quarter of the global large-format printer market.

As print speeds increase and e-commerce growth fuels demand for faster delivery, customers’ expectations for shorter turnaround times continue to rise. Yet, despite all the innovation in print hardware and software, one area often lags behind – large-format finishing.

No surprise here, finishing is usually the bottleneck on Print jobs as well. Here are some automation ideas to ease the constraints.

RRD Research Reveals What Marketers Are Looking For in 2026 - Iridio’s 2026 Marketing Predictions report found that 53% of marketers cite human interaction replacement and AI deception as top threats to consumer trust, 55% name AI and machine learning as a top 3 tech investment, and 78% of marketers plan to use AI for personalization and improved customer experience.

Short, but insightful article. It shows the massive investments in AI for efficiency, but rightly points out the risk of consumers possibly losing trust in Brands because of AI. Not surprising, is the pressure on measuring the results of digital and print campaigns, to focus on the best returns.

10 Lessons: Fostering Sales Success with AI and ChatGPT - Maybe you need a presentation, want to turn a customer success story into a case study, or you want to improve your LinkedIn profile. AI gets it done.

Perhaps you wish you had better closing skills, could get input in solving a sales problem, or wish you could gather a critique on the email you plan to send after a client meeting. AI could be the solution.

Lengthy, but good read about using AI from a personal POV. Applicable to any Sales Professional.

2026 Is Not the Year to 'Try' AI - 2025 was the year AI stopped being optional for print and packaging companies.

Not because it was easy.

Not because it was perfect.

But because ignoring it stopped being a responsible choice.

By the end of 2025, AI was no longer confined to innovative teams or side projects. It showed up in estimating, in customer demands, in procurement conversations, and in boardrooms asking the same question over and over: “Why are we behind?”

For most organizations, AI didn’t enter through a plan. It entered through disruption.

And that’s not a bad thing. Disruption wakes people up.

But 2026 is not the year for curiosity, pilots for the sake of pilots, or another round of “let’s see how this goes.” 2026 is the year to get serious about readiness, strategy, and execution.

To me, this is one of the best summations of how to approach implementing AI. Do you really want all your employees implementing AI however they want? Read this one, it’s a great framing of AI.

RIT Merges Print and Graphic Media Degree Into Packaging Science Program - Many printing industry leaders — both past and present — attended the Rochester Institute of Technology (RIT) to earn a bachelor’s degree in printing. Dating back to 1922 and long considered the premier program for the graphic arts industry, it drew trade and high school graduates who often hailed from family-owned printing businesses. In 1981, RIT’s printing program peaked with 775 students, learning business management and hands-on (primarily sheetfed and web offset) production operations skills.

So, it’s no surprise that some of the roughly 4,000 active alumni are disheartened to learn that RIT’s print and graphic media technology curriculum, which has experienced several years of declining enrollment, is being integrated into the university’s packaging science program.

Sad to see, but no surprise, as overall College enrollment is declining, let alone for Print.

Robotics in Production Print: A Turning Point for the Industry – Robotics is reaching a tipping point in production print, moving from experimental to essential as shops look for answers to labor shortages, bottlenecks, and rising productivity demands. Yet new Keypoint Intelligence research shows that while interest is surging, buyers still want proof: real-world use cases, reliable performance, seamless workflow integration, and partners who understand print.

As with all new technological change, buyers want assurance and there is still not enough for mass adoption, but the “hockey stick” growth curve will take hold in the not-too-distant future.

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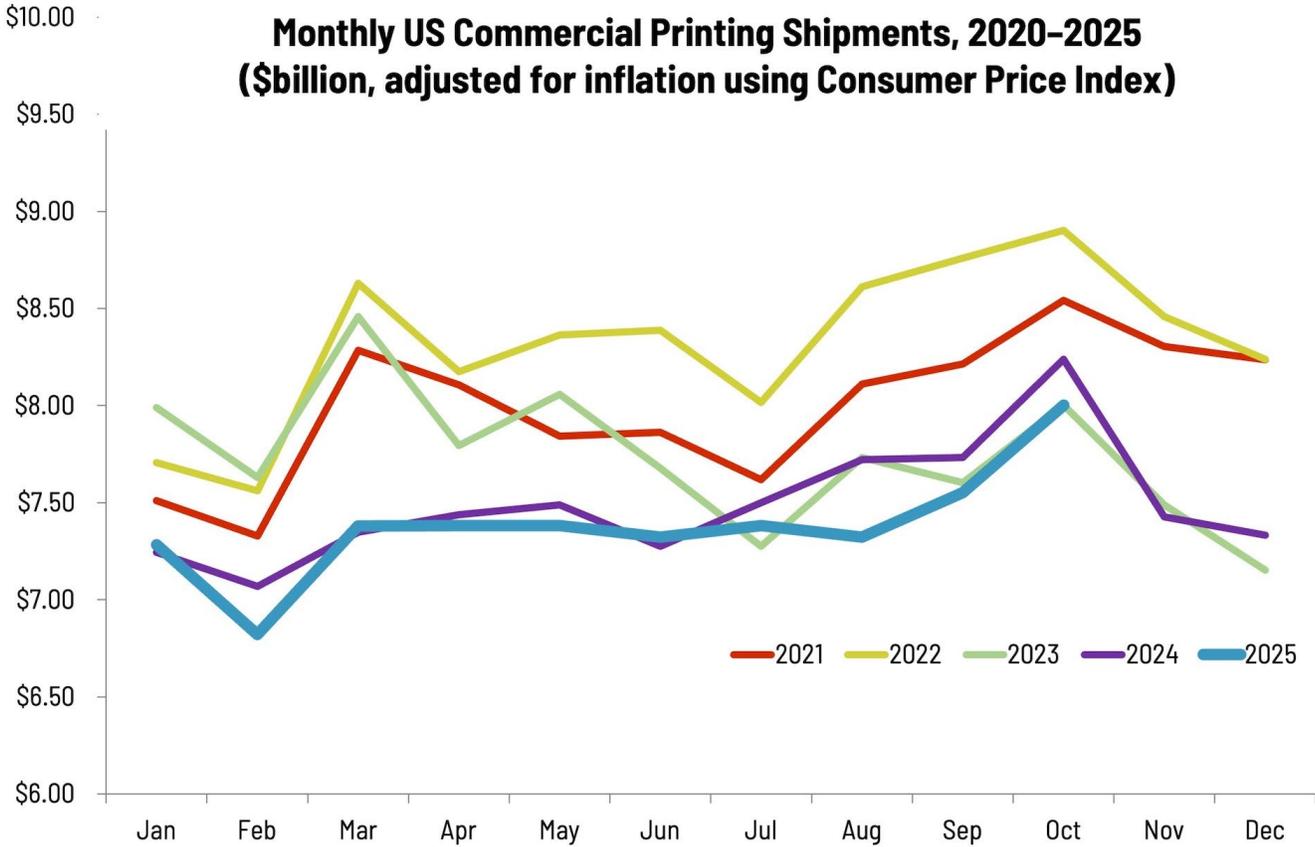
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What They Think – January 30

October Printing Shipments More Treat Than Trick

October 2025 shipments came in at \$8.00 billion, up from September’s \$7.55 billion.
 Friday, January 30, 2026



After a pretty flat stretch for most of the year, shipments rose from August to October, hitting a yearly high in October of \$8.00 billion. Most of 2025 certainly had its challenges economically: the tariffopalooza did not help matters (although that has, fingers crossed, kind of stabilized), and the employment situation had looked a little concerning, but seems OK. 2025 had not been as good as 2024, at least up to the fall—we’re nervous about November and December—but it looks like we are making up some ground, and October shipments were on par with 2023. So there’s that.

Shipments are only half of the story; profitability is the other half, and as costs for just about everything continue to rise, printers can only pass so much of that onto customers, which means that despite how much shipments (aka revenues) rise, profitability may remain flat, or even decline. Year-to-date (January to October) shipments for 2025 are at \$73.83 billion, a bit below last year’s \$75.06 billion. We still have a shot at matching 2024’s shipments numbers, but given what we usually see in the last two months of the year, we may come up a bit short.

In-plant Impressions – January 30

Becoming California's 'Printer of Choice'



From left: State Printer Lou Butera stands with Assistant State Printer Norma Kreider and Administration Manager Tonya Said next to the in-plant's eight-color Harris M-1000B web offset press. | Credit: All photos courtesy California OSP



By [Bob Neubauer](#)

Visiting California's Office of State Publishing (OSP) can be an overwhelming experience. Unlike the more modest facilities of a typical in-plant, OSP's 128,000-sq.-ft. main plant rivals most commercial printers in size and scope.

The country's second largest in-plant, behind only the U.S. Government Publishing Office in Washington, D.C., OSP is one of the few in-plants with a web offset press: an eight-color Harris M-1000B. The press consumes an average of 20,000 lbs. of paper each day to churn out millions of voter information guides, driver's license handbooks, tax forms, and other essential documents.



Inside the pressroom at the California Office of State Publishing, Dwayne Moore operates the hoist on a roll lift for the in-plant's eight-color Harris M-1000B web offset press.

OSP's six-color, 40" Heidelberg Speedmaster sheetfed press stays busy printing unemployment claim forms, DMV driving manuals, calendars, booklets, brochures, posters, and newsletters. Drent and Muller Martini web forms presses print driver's license renewal forms, tax forms, newsletters, invoices, and certificates, and two Halmjet presses turn out roughly 33 million envelopes per year.

The 252-employee in-plant has a substantial digital printing operation as well. In its main plant, three Canon varioPRINT 6330 monochrome digital presses print high volumes of legislative materials, usually

late at night, after the legislative sessions end. OSP may get 200-300 bills a night and must print 500 sets of each by the next morning. Some legislative books can be 800 pages long.

Related story: [California Opens New, Green State Printing Plant](#)



Michael Lubinkas (left) and Mark Chase review a press sheet for a California Department of Public Health booklet being printed on OSP's six-color, 40" Heidelberg Speedmaster sheetfed press.

And in its secure digital print and mail facility in downtown Sacramento, OSP houses a host of digital presses: a Ricoh Pro C9500, two Canon VarioStream 7650 continuous-feed presses, two Canon 6320 black-and-white cut-sheet printers, and a 20" Ricoh Pro VC60000 production inkjet press, among other devices. That facility produces about 20 million impressions a year, and there are plans to add additional continuous-feed inkjet presses.

A Leaner, Smarter Operation

As vast as OSP's operation is, it's less than half the size it was a few decades ago. In the 1990s it employed 540 people and operated four Hantscho web presses and three Harris webs. But as demand dropped and digital technology advanced, OSP changed with the times, getting leaner and adding new services.

With \$86 million in annual sales, today's OSP provides a comprehensive range of services that support state agencies across the full lifecycle of documents and communications — from creation and design to printing, mail delivery, storage, fulfillment, and secure destruction. It even handles ADA remediation for electronic documents to make them accessible to screen readers.



Anthony Vang runs one of OSP's three Canon varioPRINT 6330 monochrome digital presses.

Guiding OSP as it responds to today's demands while preparing for the future is State Printer Lou Butera, who came on board in August 2024. Under his leadership, OSP has been actively transitioning from maintenance mode to measured growth and modernization. The in-plant has made tangible gains in productivity and cost control, while focusing on organizational culture as the foundation for long-term success.

"Our vision is to be the printer of choice," Butera proclaims. "We're looking at how we keep more work in-house. And of course, to do that, we need to be competitive. We need to earn the business." With years of industry experience at companies like R.R. Donnelley, Direct Marketing Solutions, and Canon Solutions America, Butera brought a commercial printing approach to the government operation, which is part of the state's Department of General Services.

Four Goals for Future Success

When In-plant Impressions met with him in his office a year ago, he outlined four key goals he had for OSP:

1. Grow the business.
2. Improve operations by reviewing equipment, software, workflow, and client interactions.
3. Enhance OSP's financial health by reducing costs.
4. Develop the organizational culture by emphasizing integrity, teamwork, and continuous improvement.



From left: State Printer Lou Butera stands with Assistant State Printer Norma Kreider and Administration Manager Tonya Said next to the in-plant's eight-color Harris M-1000B web offset press.

We caught up with Butera recently to track OSP's progress toward those objectives. He was quick to stress that he values the fourth goal more than the others.

"Cultural development is OSP's number one goal," he stresses. "A good strategy is much more effective with a solid culture to support the vision and efforts. The leadership team has been working hard to help shape a culture that embraces change. OSP is committed to helping the entire leadership team acquire the skillset to manage change, share ideas, challenge tradition, explore innovation, and hold us accountable to a high-performance level that is both measurable and supports our goals."

He wants his staff to come to work with a desire to learn and continually improve. With this in mind, he sent three staff members to PRINTING United Expo 2024 to get a broad perspective on how the industry is changing. "They came back very motivated, very excited," he says, imbued with "a shared vision of new workflows, new equipment, new technology, and fewer touches."



OSP's senior leadership team poses outside the Ziggurat Building, which houses the Department of General Services. For the team-building meeting, many wore their favorite sports team jerseys.

This shared vision is helping to fuel OSP’s growth and operational improvement goals and move it away from the traditional state government acceptance of “business as usual.”

Bringing in Business

To support the goal of growing OSP’s business, Butera hired a new program manager to help capture business that had been released to private sector printers. Though a state mandate requires agencies to send their printing to the in-plant, OSP has opted to procure some of that work in the past. Thanks to the new program manager’s efforts, two new monthly print programs have been brought back in-house and more will be added, he says.

“OSP is also looking to deliver new digital and technology-driven services to other agencies,” Butera says. “This project is moving along nicely with support from both the DGS Enterprise Technology Solutions team and the California Department of Technology. The additional value-add services as well as onboarding more agency program work will provide additional revenue and growth for the OSP.” To improve its business operations, OSP has created a “technology roadmap” that combines new print and mail technologies with process improvements to existing workflows.

“We have seen a 27% productivity improvement just with the printing and finishing of the voter information guides that are printed and bound in-house on our Harris M-1000 B web offset press,” proclaims Butera. “For this last special election, OSP was able to print and finish roughly 65% of the 14,500,000 voter information guides in half of the normal schedule. This is a record quantity in a shortened schedule. OSP’s goal is to provide faster and more customer onboarding, allowing for more growth.”



State Printer Lou Butera stands with Assistant State Printer Norma Kreider and Administration Manager Tonya Said on the in-plant’s eight-color Harris M-1000B web offset press.

OSP has completed its five-year asset purchase plan, which will be included in the five-year strategic plan now being finalized. Already OSP has added a sheetfed inserter in its digital print facility to increase productivity. Plans are in effect to replace the two Canon 6320s with one faster black-and-white toner press and to add new web inkjet presses over the next year.

Helping to guide OSP through its new equipment decisions has been a series of focused customer meetings.

“We have met with eight clients and established regular quarterly business reviews,” he says. “We have also incorporated several tours for clients that have never been through a printing plant.”

A Look Inside the California Office of State Publishing

IPI's Bob Neubauer recently toured the California Office of State Publishing, which employs more than 300 employees in its three Sacramento facilities. One of the few in-plants with web offset presses, it also houses an arsenal of digital..

During these meetings, Butera and his staff ask customers for honest feedback about OSP's performance and inquire about their future needs, to help the in-plant buy the right equipment and provide the right services to help them. It's all part of Butera's quest to earn their business and become their printer of choice.

To reduce costs and improve OSP's financial health, Butera has focused on better equipment utilization, dynamic process improvements, and moving to more of a just-in-time workflow. He also sees ways to downsize OSP's space needs by reducing the storage of both raw materials and physical records.

“There are some positive opportunities to help our cost structure by reducing our overall monthly building costs,” he notes.

Supporting Customer Success

All of these business improvement and workflow efficiency goals have one overriding intent: to support the success of state agencies. This support extends beyond ink on paper to other digital platforms, he notes, and by better partnering with agencies, OSP can educate them about these possibilities.

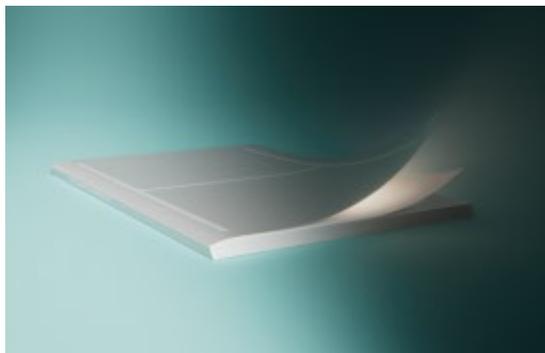
“Our goal is to pursue the vision of being ‘The Printer of Choice,’” Butera maintains. “This means providing excellence in all that we do and working with an attitude of ‘earning their business’ through timely communication and exceptional quality of finished products.”

By developing “top-tier, high-performing teams” focused on finding efficiencies and keeping pace with technology changes, he says, OSP will continue to improve in the years ahead.

“The best strategy and objectives mean nothing without engaged and motivated teams to support the vision,” he says. “We will make it easier for our customers to work with us and to reduce our production cycle time by investing in new technologies” — including additional non-print services. “And yes,” he concludes, “there will be a place for AI in the workflow and customer engagement process.”

Printing Impressions – January 28

New Magazine Paper Redefines Printing



Credit: Holmen

It's not every day that a new printing paper is launched, but Holmen has introduced a groundbreaking magazine paper that is whiter than conventional alternatives, delivering sharper photographic reproduction along with low carbon emissions.

Holmen Aspect is an exceptionally white, wood-containing paper designed to set new standards in magazine printing. Developed for the demands of a transforming market, it ensures sharp visual reproduction and an appealing page thickness even with a low gsm weight.

A new direction in print innovation

The new paper is engineered to be whiter than any conventional wood-containing magazine paper, unlocking fresh possibilities for publishers, designers and readers.

- The paper's enhanced whiteness allows photographic content in the high dynamic range to be reproduced with clarity, sharper contrasts and vivid detail.
- Thanks to the paper's smooth, matt surface, the magazine will grab attention while also providing a pleasant, glare-free reading experience.
- The paper offers superior opacity, so content won't show through to the other side of the page, even when a low gsm is used.

"Thanks to Holmen Aspect, premium content can now be printed more cost-effectively for brands in the high-end categories," says Christophe Irion, Segment Manager Magazines at Holmen Board and Paper. "We're proud to present a paper that not only prints beautifully but also helps reduce carbon emissions* and resource consumption across the value chain."

Benefits of fresh fibres

"Our mill and development teams continuously strive to maximise the potential of fresh fibre," explains Lars Åkesson, Product Manager for Graphical Papers at Holmen Board and Paper. "Since the

natural strength of the fibres can be preserved in our production process, our papers achieve a quality and thickness normally associated with higher-grammage papers.”

Holmen is one of the world’s most highly respected paper producers, operating four flexible paper machines running around the clock in resource-efficient mills. The launch of Holmen Aspect underscores the company’s role as a pioneer in lightweight high-quality graphical papers.

Responsible use of Swedish forests

The paper is produced using residual wood from sustainably managed Swedish forests and sawmills. Sweden’s forestry model is recognized for its high wood quality, replanting practices and strong biodiversity protection. Modern forestry is designed to ensure long-term, healthy growth and minimize waste. Holmen aims to demonstrate how responsible choices create real impact.

“Our journey towards the magazine paper of the future starts in the forest. The paper we produce is perfect for publishers seeking exceptional photographic quality and a strong environmental profile. It’s a step forward for both creativity and sustainability,” Christophe Irion concludes.

*Holmen’s paper mills have a carbon footprint benchmark that is around 800 kg lower than the industry average per tonne of paper, according to the Fisher Solve database for 2025 Q2, reporting on a cradle-to-gate basis (ResourceWise).

[Source: Holmen Board and Paper](#)

Printing Impressions – January 28

The Future is Bright for Commercial Printing



Credit: Tom Werner, Getty Images



By [Andrew D. Papanozzi](#)

This is no ordinary time for commercial printing. Extreme uncertainty created by no-one-knows-what's-next tariff policies has dampened sales, inflated operating costs, and squeezed profit margins across the industry. Meanwhile, transformative technologies such as artificial intelligence (AI), the Internet of Things, and smart robotics redefine what's possible and widen the gap between top performers and everyone else.

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increases 3.9% to 2.1%, real (inflation-adjusted) sales, a measure of production, declined 1.8%, and pre-tax profitability was flat or down for 72.3% of respondents. Conditions are described as “troubled waters, with tariffs and rising costs all over the place,” and “confusion and economic uncertainty, which are causing clients to delay or defer projects and reduce run size.”

Commercial printers surveyed broadly agree that the challenges of 2025 will continue in 2026. Specifically, 61% are most concerned about increasing sales, 52.4% about maintaining profitability, and 51.2% about the economy. Persistent cost inflation, particularly labor and substrate costs, losing work to print alternatives, and uncertainty created by Washington, each cited by more than two-fifths, follow (Figure 1).

Figure 1: Biggest Concerns Heading Into 2026

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

Concern	Citing
Increasing sales	61.0%
Maintaining profitability	52.4%
The economy/overall business conditions	51.2%
Rising labor costs	43.9%
Rising substrate costs	42.7%
Losing clients to print alternatives	42.7%
Uncertainty about Washington's economic/business policies	41.5%
Labor shortages	39.0%
Rising utility and overhead costs	37.8%
Effects of tariffs on costs, supply chains, workflow	37.8%
Maintaining cash/working capital balances	35.4%
Rising ink/toner costs	35.4%
Rising transportation costs	29.3%
Rising energy costs	28.0%
Government regulations (federal, state, local)	19.5%
Material shortages/inability to acquire materials	14.6%
Tighter credit conditions/elevated interest rates	14.6%
Maintaining productivity	14.6%
Other	6.1%

Collectively, our research panel listed more than 30 priorities for the year ahead, ranging from focusing on core services and business fundamentals (getting back to basics) to cybersecurity. The most widely cited priorities, summarized in Figure 2, fall into four categories:

- World-class efficiency. Increasing productivity companywide, controlling costs — finding and plugging leaks — and automation ranked first, second, and third, respectively. Quality control makes the list (because markets are too competitive to pass inefficiencies on to clients) and so does increasing production speed to meet client demand for faster job turns.

- Profitable revenue growth. Capture value-added, high-profit sales. Promote the company’s full range of capabilities and the value created for clients. Improve the customer experience by reducing response times and expanding e-commerce capabilities. Diversify beyond commercial printing. (Nearly 65% have added graphic and sign printing and nearly 42% package and label printing.)
- Artificial intelligence. Explore how AI can help most. Sales prospecting? Market analysis and forecasting? Preventive maintenance?
- Business intelligence. Strengthen ERP, MIS, CRM, and comparable systems for more timely, complete data on what’s happening internally and externally, and base decisions on that data.

Figure 2: Business Priorities 2026

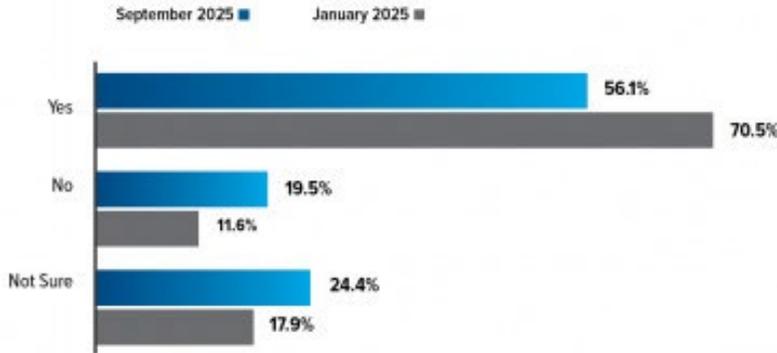
Q: What are your top priorities for 2026? Most frequent responses.

Priority	Citing
Productivity. Find ways to be more efficient companywide, do more with less	72.0%
Cost control. Find and plug leaks. Keep a closer eye on expenses	65.9%
Automation. Reduce touches and steps, streamline processes companywide	63.4%
Capture higher value-added, more profitable sales	53.7%
Marketing. Build our brand. Promote full range of our capabilities and value created for clients	47.6%
Improve the customer experience. Reduce response times. Make it easier for customers to do business with us	43.9%
Quality control. Reduce waste, spoilage, error rates	43.9%
Artificial intelligence. Expand use of/learn more about AI	42.7%
Strengthen business intelligence systems (ERP, MIS, CRM). Improve KPIs, dashboards, etc.	41.5%
Strengthen cash flow	36.6%
Diversify our revenue base. Add products, services, capabilities, and markets	36.6%
Strengthen e-commerce. Enhance web-to-print, company website, customer portals, etc.	36.6%
Increase production speed/throughput	36.6%

Capital investment plans have clearly been affected by the extraordinary uncertainty of the past year. Among all commercial printers surveyed, 56.1% currently plan to invest in capital equipment, hardware, or software over the next 12 months, down from 70.5% in January; 19.5% do not plan to invest, up from 11.6%; and 24.4% are not sure if they will invest, up from 17.9% at the start of the year (Figure 3).

Figure 3: Capital Investment Plans

Q: Do you plan to invest in capital equipment, hardware, or software over the next 12 months?



The list of most desired investments is headed by bindery/finishing systems, so productivity gains in prepress and press are not lost to bottlenecks in the bindery, and AI, which can enhance every mission-critical function from sales prospecting to cash management. Also on the list of most desired investments (Figure 4): production inkjet, offering benefits (compared to offset) such as lower cost per page on short and medium runs, faster turn times, and greater personalization capabilities; mailing and fulfillment to generate additional value for clients and create “sticky” work; and e-commerce to extend automation directly to the client.

Figure 4: Most Desired Capital Investments

Q: Which investments would you most like to make over the next 12 months? Most frequent responses.

Priority	Citing
Bindery/finishing equipment and systems	50.7%
Artificial intelligence applications	38.0%
Production inkjet presses	33.8%
Mailing capabilities	23.9%
Fulfillment capabilities	23.9%
E-commerce solutions (web-to-print, web storefronts, etc.)	22.5%

We asked commercial printers what they see when they look ahead to 2026. They talked about a continued loss of work to print alternatives, rising postage rates and delivery issues. One responded, “I am losing confidence that the USPS will ever be able to deliver according to their own schedules, fill empty staff positions, and run at a break-even level.” They also noted continued consolidation and shakeout of weaker companies, and the need for “more macroeconomic stability.”

They talked about something significant to every commercial printer, regardless of company size, revenue composition, or customer base: the widening gap between “the haves and have-nots,” or industry leaders and everyone else.

The question is why the gap is widening. The answer is because commercial printing, like the printing industry at large, is changing structurally as well as cyclically.

Cyclical change is the ups and downs of the economy, interest rates, inflation, government policies (such as tariff policies) and everything else that moves in a business or political cycle. Each cycle requires adjusting business practices but not redefining them — what got you through the last runup in interest rates will get you through this one.

Structural change is fundamental change in the very nature of an industry driven by transformative technologies such as AI, the Internet of Things, and smart robotics. Structural change does not simply create new ways to do what we've always done. Rather, it creates a spectrum of new possibilities, requiring new mindsets and approaches. Structural change exempts no one: You either adapt to it or you get left behind. There is no third option.

Structural change means a rising tide no longer lifts all boats. This year the American economy will grow a modest 1.5%-1.8%. Next year growth may reach 2.5%-3%, accelerating as 2026 progresses.

Among the reasons:

- Productivity is increasing economywide as companies aided by AI boost automation, production speed, and efficiency. Consistent productivity gains drive a virtuous cycle that supports sustained, noninflationary economic growth.
- Immediate expensing measures in the One Big Beautiful Bill Act will encourage capital investment, strengthening the virtuous cycle despite the uncertainty created by tariff policies.
- Rising productivity and moderating energy prices will tamp down inflation, supporting reductions in both short-term and long-term interest rates.

But even if the economy strengthens, uncertainty eases, and business conditions are more favorable in 2026 than they were in 2025, no commercial printing company can count on a better outcome. As one SOI contributor says so well, success is now reserved “for those who embrace technology through automation, robotics, cloud-based infrastructure solutions, pragmatic AI, customer-centric culture, and workforce development.”

Let's add the following requirements to his list:

- Moving ahead with business plans, priorities and capital investment because during periods of extreme uncertainty, moving forward is risky but sitting still and waiting for clarity is even riskier.
- Strengthening risk management through scenario planning, risk heatmaps, and risk registers and opportunity evaluation through the Cagan Opportunity Assessment, Lean Canvas, and Product Opportunity Evaluation Matrix. The State of the Industry Report 2025: Turning Uncertainty into Opportunity, available on printing.org, outlines how.
- Having an AI/smart robotics strategy. Understanding their capabilities and how they can help, setting objectives and tracking progress toward those objectives, staying abreast of developments in both fields, and having someone responsible for your strategy.

So what's the outlook for 2026? It's bright — at least for commercial printers prepared to make structural change and the transformative technologies driving it are an opportunity rather than a threat.

What They Think – January 28

FASTSIGNS® Marks a Decade of Dominance, Ranking No. 1 in Category on Entrepreneur Magazine’s Franchise 500® List for 10th Consecutive Year

Wednesday, January 28, 2026

Press release from the issuing company

The Leading Sign, Graphics and Visual Communications Franchise Earns Spot on Prestigious Industry List for 14th Year

(CARROLLTON, Texas) — FASTSIGNS®, the leading sign, graphics and visual communications franchise, is marking a decade of dominance, ranking as the No. 1 franchise opportunity in its category in Entrepreneur’s Franchise 500®. This marks the 14th consecutive year FASTSIGNS has been recognized on the industry’s most comprehensive and competitive franchise list, earning the 149th spot overall. To view the full ranking, visit www.entrepreneur.com/franchise500.

The achievement reflects FASTSIGNS’ continued momentum after a year of growth and industry recognition. In 2025, the brand expanded its footprint with more than 20 open and operating locations worldwide and sold an additional 30 locations across key markets, including the brand’s second location in the Dominican Republic. Notably, FASTSIGNS continued to grow its vibrant co-brand program, signing three new co-brand locations in New York City last year. Additionally, FASTSIGNS was recognized on Entrepreneur’s 2025 Best of the Best Franchises; earned the Canadian Franchise Association’s Franchisees’ Choice Designation and Silver Award of Excellence; and was named to Franchise Business Review’s Top 100 Franchise for Women and Top 100 Franchise for Veterans.

“Ten years as No. 1 in category speaks volumes to the strength and appeal of FASTSIGNS’ proven model as a path to small business success,” said Mark Jameson, chief development officer at Propelled Brands. “FASTSIGNS continues to stand out because we prioritize long-term franchisee prosperity through scalable systems, comprehensive support, and a brand that consistently adapts to the evolving needs of businesses in each community we serve.”

In Entrepreneur’s continuing effort to best understand and evaluate the ever-changing franchise marketplace, the company’s 47-year-old ranking formula continues to evolve as well. Each franchise is thoroughly evaluated and given a cumulative score based on an analysis of more than 150 data points in the areas of costs and fees, size and growth, franchisee support, brand strength, and financial strength and stability. The 500 franchises with the highest cumulative scores become the Franchise 500® in ranking order.

"We decided to open a FASTSIGNS because we wanted to build something for ourselves instead of for someone else, and to have more control over how we run a business," said Kyle Brandemuhl, who owns FASTSIGNS of Sheboygan, Wisconsin with his wife Kerstin. "Creating a workplace culture that is inviting, relaxed, inclusive, and customer-focused was also very important to us. FASTSIGNS stood out

because of the overwhelmingly positive and honest feedback we heard from existing franchisees. Corporate is responsive and supportive, but also gives us the freedom to run our business independently.”

Over its 47 years in existence, the Franchise 500® has become both a dominant competitive measure for franchisors and a primary research tool for prospective franchisees. FASTSIGNS’ position on the ranking is a testament to its strength as a franchise opportunity.

The total investment for a FASTSIGNS franchise is approximately \$248,083 - \$344,624, including a \$49,750 franchise fee. As a member of VetFran, the brand offers a special incentive for veterans and first responders, which includes a 50% reduction on the franchise fee – a savings of \$24,875.

For information about the FASTSIGNS franchise opportunity, contact Mark Jameson (mark.jameson@propelledbrands.com or 214-346-5679) or visit <https://www.fastsigns.com>.

Printing Impressions – January 27

A Wide-format SWOT for 2026



By [Toni McQuilken](#)

The following article was originally published by [Wide-format Impressions](#). To read more of their content, subscribe to their newsletter, [Wide-Format Impressions](#).

One of the most ubiquitous tools in the business world is the SWOT analysis — Strengths, Weaknesses, Opportunities, and Threats. It’s a quick way to break things down and have a clear idea of where the business is doing well — and where there might be room for improvement.

As 2026 gets into full swing and wide-format producers start planning for how to grow in the coming months, we asked several owners all in different phases of their wide-format journey — and in different regions of the U.S. — to SWOT the wide-format segment .

Our panel:

- Brian Adam, president of Olympus Group, headquartered in Milwaukee, Wisconsin
- Crystal Savage, vice president of Alliance Reprographics in Houston, Texas
- Brian Hite, principal and co-founder of Image Options in Foothills Ranch, California.

Strengths

BA: The wide-format industry is stable-to-growing, supported by ongoing demand in retail, events, sports, out-of-home, and branded environments. Compared with many other print segments, margins have historically been stronger due to complexity, speed requirements, and the value of consistent execution — though margins are compressing quickly. Physical print remains a core part of how brands show up in the real world, and the best providers differentiate through quality, reliability, and the ability to deliver complete programs (print plus finishing plus kitting plus installation coordination) with fewer handoffs.

CS: One of the strongest attributes of the large-format printing and reprographics segment today is adaptability. Alliance Reprographics has intentionally diversified across product offerings and industries. This evolution has contributed to our strongest performance to date. Clients are increasingly seeking providers who can support a wide range of needs, from traditional reprographics to large-format graphics, signage, and installation. We have expanded our product offerings and invested in relationship-based sales, and we are seeing more consistent demand and deeper client engagement. Diversification across industries has reduced our reliance on any single market cycle, creating greater stability. Overall, our focus on expanded capabilities, client relationships, and solution-driven service is driving long-term growth.

BH: Within large-format, retail interiors, and experiential work, the strongest parts of the industry continue to be those supporting complex, execution-driven projects rather than purely transactional print. As programs become more integrated, combining print, fabrication, logistics, installation, and coordination, the value shifts toward firms more capable of managing complexity and delivering consistently. Physical environments remain an important element for brand presence, customer engagement, and experiential marketing. When executed well, these projects are difficult to replicate quickly and tend to reward experience, operational discipline, and cross-functional collaboration. The industry's continued evolution beyond traditional print into broader spatial and experiential solutions has become a meaningful strength, particularly where clients seek accountability, reliability, and fewer handoffs across vendors.

Weaknesses

CS: An ongoing challenge is keeping pace with technology and AI adoption. As workflow and customer communication become more technology-driven, our team, with deep industry experience, faces a learning curve with newer tools. Without intentional investment in systems and training, efficiency gains can lag. Addressing these weaknesses requires discipline, flexibility, and a willingness to evolve business practices that were effective in the past but no longer support consistent growth.

BH: A persistent challenge across the industry is limited demand visibility. Projects are often approved late in the cycle, scoped conservatively, and are subject to change, placing pressure on forecasting, capacity planning, and sales pipelines. Workforce constraints are compounded by wide swings in demand. Large, unpredictable projects can temporarily strain limited teams, while inconsistent volumes make it difficult to staff permanently at higher levels. At the same time, experienced labor is increasingly difficult to replace, and onboarding timelines are longer than in prior years. This creates an imbalance where companies can feel undersized for periods of intense activity and oversized during slower periods. At the more commoditized end of the market, continued price competition compresses margins, limiting reinvestment in people, systems, and equipment. Together, these dynamics make it harder for some companies to sustain momentum and reinforce the need for disciplined operations and financial management.

BA: Convergence is accelerating. Larger brands, retailers, and agencies are bringing pieces of production in-house, and traditional “print-only” work is increasingly bundled into broader marketing services. At the same time, technology improvements are making print and finishing easier to produce and manage, lowering barriers to entry and expanding the competitive set. That combination can push work toward simpler, more transactional buying behaviors and intensify price pressure, especially when demand visibility is limited and schedules change late.

Opportunities

BH: Opportunities moving into 2026 are likely to favor companies that prioritize execution quality, operational efficiency, and alignment with client needs, rather than volume alone. Clients increasingly value partners who can simplify complex programs, anticipate challenges, and deliver reliably across multiple touchpoints. There is continued opportunity in branded environments, events, and retail programs where physical space supports storytelling, differentiation, and engagement. Internally, investments in process improvement, workflow integration, and productivity offer a meaningful upside, even in a cautious demand environment. The industry also appears positioned for selective collaboration and consolidation as firms reassess scale, specialization, and long-term sustainability.

BA: The market is growing, and 2026 is positioned to be a strong year as economic conditions improve and marketing activity rebounds in many categories. AI and automation are already helping teams do more with fewer resources, improving estimating, prepress, scheduling, and workflow accuracy while reducing cost and rework. Wide-format also benefits from diversity: the same core capabilities can serve many end markets and product types, creating opportunities to pivot toward the strongest verticals, expand higher-value offerings, and deepen relationships through program standardization and faster turnaround.

CS: Looking ahead to 2026, the segment's growth opportunity remains strong. Clients prefer fewer vendors and seek providers with a wide range of capabilities. Expanding across industries and services remains a growth strategy. Continued investment in technology, process improvement, and workforce development will allow Alliance Reprographics to take on more complex, higher-value work without sacrificing service quality. We have been in business for 20 years and, with three consecutive years of

growth, it reinforces that sustainable success comes from balancing expansion with operational readiness and execution.

Threats

BA: Convergence and continued technology improvements will keep making “good enough” print easier to produce, increasing commoditization and intensifying competition from non-traditional entrants. Wide-format demand is closely tied to marketing budgets, and marketing spend is tied to economic confidence, so volatility and uncertainty can quickly impact order flow, utilization, and pricing. Adding to that pressure, consolidation and private equity-backed rollups are reshaping the competitive landscape, often using scale, aggressive pricing, and centralized procurement to win share and compress margins for everyone else.

CS: One of the more significant threats we’re monitoring is increased price-driven competition that puts downward pressure on the market. When providers compete primarily on price, it can shift client focus away from service, reliability, and turnaround time. We know we are not the cheapest option, and our value is intentionally built around customer service, speed, and consistency. The concern is not competition itself, but market erosion if pricing becomes the dominant differentiator. As clients become more cost-sensitive, particularly during periods of economic uncertainty, margins are squeezed across the segment, and service levels can suffer. That dynamic ultimately hurts both providers and customers. Our focus heading into 2026 is on pricing discipline, clear value communication, and partnering with clients who prioritize performance and dependability. Long-term growth depends on protecting the segment's overall health.

BH: The most significant risks heading into 2026 remain tied to uncertainty and volatility. Shifts in client confidence, delayed decision-making, and changing priorities can quickly affect project flow and utilization. It is difficult, at best, to navigate circumstances outside of a business’ control. Cost pressure from labor, compliance, and operational overhead continues to challenge margins, particularly for companies with limited flexibility. Commoditization remains a structural threat at the simpler end of the market, while client expectations around speed, precision, and accountability continue to rise. Together, these pressures increase downside risk when projects are under-scoped or misaligned, underscoring the need for discipline, adaptability, and a clear understanding of where each business can realistically compete and add value.

Printing Impressions – January 27

Recap and Forecast: State of M&A in the Commercial Printing Segment



Credit: Alona Horkova, Getty Images

By [James Russell](#) and [Peter Schaefer](#)

As we reflect on the past year, which was a healthy one overall for mergers and acquisitions in the printing industry, it's a good moment to assess what drove the activity in 2025 and what's likely to carry the momentum forward into 2026.

The industry's two principal segments — packaging and commercial printing — have different financial parameters. But the macroeconomic trends underpinning them are the same, and those forces remain encouraging for buyers and sellers alike.

Especially reassuring is the fact that the pace of M&As is coming back up to what it was in the early years of the present decade. 2021 and 2022 were record breakers in terms of transactions completed — as M&A advisers, we were never busier. Although not quite as hyperactive, 2023 was a blockbuster in its own right.

Then came the slowdown of 2024: not because of any shortage of buyers, but because many sellers had decided to hold off going to market.

They pushed the pause button partly out of uncertainty surrounding the presidential election and its implications for business and the economy. The other drag on their plans was a slowdown for the industry as a whole, with real sales growth of -2.1% during the first half of 2024 followed by a -1.1% decline in the third quarter.

We can report that the pace has picked up again in 2025, so much so that in the remainder of the year and into 2026 we expect activity to look more like it did in 2023 than it did in 2024.

Tracking the Tailwinds

Consider the general trends. Banks and other financial institutions remain willing to lend capital for funding M&As. The Federal Reserve cut its benchmark overnight interest rate in September and possibly will have done it again by the time this article is published, easing the cost of borrowing money. The multiples of publicly held printing and packaging companies continue to be strong. But the best reason for optimism may be that new buyers, particularly private equity (PE) investors, are still coming into the industry. In fact, more buyers are active out there than ever before.

PE-funded financial buyers have abundant money to spend on aggregating multiple companies into business platforms that they resell after optimizing profit performance. Strategic buyers with excess capacity to fill know that often the best way to do this is by acquiring the sales volume of other companies. In both cases, value is created for shareholders, customers, and other stakeholders. What it all means is that now is a very favorable time to be a seller or a buyer. There has been no slowdown of interest in financially healthy, well differentiated companies in either the commercial printing or the packaging space. The only question is how long the present set of circumstances will last.

To guess at that, we have to look at the relationship between the growth rate of the printing industry and that of the gross domestic product (GDP).

It used to be that they moved in parallel: when growth in GDP increased, so did growth in industry revenues. But as last year's negative growth trends for the industry make clear, that connection is no longer unbreakable. What's more, GDP growth has declined from 5.9% in 2021 to a forecasted 1.7% in 2025 — a trend that doesn't augur positively for growth in any industry.

Reality Check

The effects of the downward trend are plain to see in the commercial print segment, where revenue growth and multiples of EBITDA tend to lag those of label and packaging producers. Many commercial firms are struggling to maintain sales, some to the point where organic growth has become almost impossible for them to achieve. This accelerates the fragmentation of the industry by driving more sellers into the M&A marketplace, where buyers pursuing strategies of growth by acquisition are waiting for them.

The sellers mostly are owners of traditional printing companies that have not expanded much beyond the basic business of putting ink on paper. The principals tend to be at or close to retirement age. For many of them, selling has become the only path toward making a financially feasible exit from the industry at whatever price a buyer can be persuaded to offer them.

Progressive firms, on the other hand, are on stronger ground by virtue of the investments their owners have made in technology that equips them for growth in up-and-coming print markets. These firms are the commercial segment's haves, and the gap in value between them and the have-nots has never been greater. Have-nots, the opposite in terms of forward-looking strategic planning, become natural acquisition targets for the haves.

The markets that a commercial printing business serves matter as well. One-to-one direct mail marketing, for example, is still a very attractive segment to be in, particularly if the company provides the data management as well as the printing services. Data-driven direct mail houses have been able to offset increases in postal rates from the profits they make by offering their customers more tightly targeted mailing campaigns in smaller volumes.

We also continue to see vigor in book manufacturing, where digital production has made it possible to build a business model around producing in very small quantities — even as small as runs of one. The market for POP and retail graphics is also holding up well.

M&A 'Magnetism'

A progressive "have" in the commercial segment can be a powerful magnet for buyers. One of our selling clients has invested heavily in digital technologies for print on demand and is recognized as a leader in that field. All but one of the buyers we marketed this company to are working on offers. Another one of our haves is a commercial business that now derives about 60% of its revenue from printing. It gets the rest from ancillary specialties such as kitting and fulfillment, which enable the company to position itself to its customers as a one-stop source of logistical services. The icing on the cake is a web portal for order entry. This company goes to market with a multiple of EBITDA that many general commercial shops would envy.

One of the soundest pieces of advice we can offer owners of commercial printing businesses as 2025 winds down is to seek differentiation by adding new products and services that customers want but can't readily obtain from the competition. Catering to customers in this way keeps them close and "sticky," protecting both the top and the bottom lines.

Every owner also should make a fundamental decision to sell the business at some point in the future or to go on growing it by acquiring another company. Action on the decision does not have to be taken right away, but the choice of direction should be clear. One of the main driving forces of the industry today is the dynamism of the M&As taking place within it. That in itself is a profit opportunity for owners who know what their next steps can be.

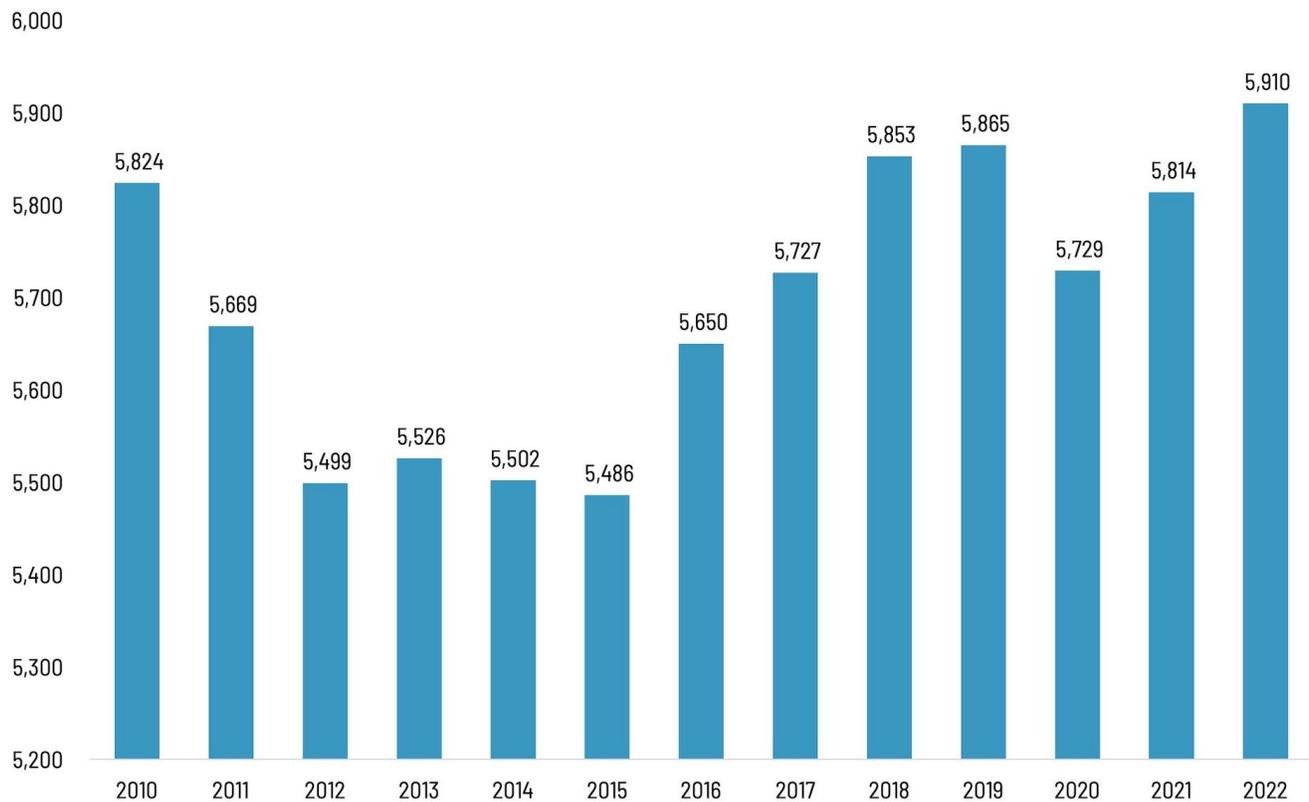
What They Think – January 23

Sign Manufacturing Establishments—2010–2022

According to County Business Patterns, in 2010, there were 5,824 establishments in NAICS 33995 (Sign Manufacturing). This NAICS category tumbled in the wake of the Great Recession, ultimately climbing back up to 5,865 establishments in 2019, but dipping a little in 2020, and then back up to an all-time high of 5,910 in 2022. In macro news: Q3 GDP grew at an annualized 4.4%.

Friday, January 23, 2026

NAICS 33995 Sign Manufacturing Establishments, 2010–2022



According to County Business Patterns, in 2010, there were 5,824 establishments in NAICS 33995 (Sign Manufacturing). Establishments in this NAICS category declined in the wake of the Great Recession, ultimately climbing back up to 5,865 establishments in 2019, dropping in 2020, and then climbing back up to an all-time high of 5,910 in 2022.

The Bureau of the Census definition for this business classification:

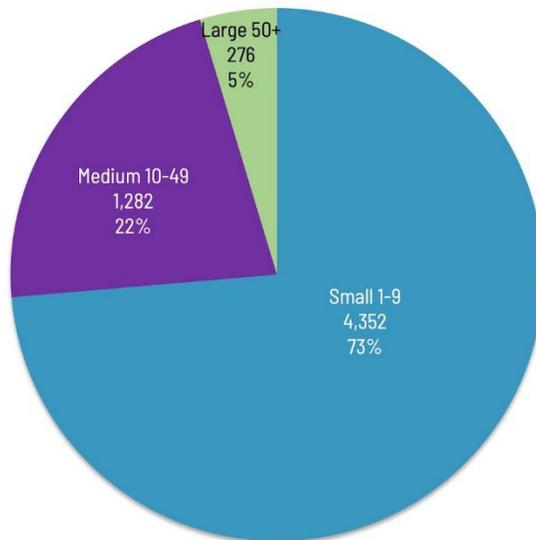
This industry comprises establishments primarily engaged in manufacturing signs and related displays of all materials (except printing paper and paperboard signs, notices, displays).

During and in the immediate aftermath of the Great Recession, there was decreased demand for signage, which didn't reverse itself until new business began forming as the economy improved, and existing companies underwent a rebrand. By the end of the decade, rebrand cycles were shorter, while at the same time consolidation in verticals such as healthcare and banking drove up the demand for new signage projects. The years preceding the pandemic saw a lot of business expansion, with chains opening new locations. All these trends drove up the demand for signage, which in turn drove up the number of providers of signage.

The way the Census Bureau captures establishment counts means that any sign manufacturing business that existed at all in 2020 was included—which means that the drop in establishments was not due to the COVID pandemic; indeed, the climb in 2021 represents the net change in establishments due to COVID. Signage and display graphics were growth areas during the pandemic.

Establishments in this category are concentrated at the small end, with 73% having 1–9 employees, 22% having 10–49 employees, and only 5% having more than 50 employees.

US Sign Manufacturing Establishments by Number of Employees, 2022



Next up in our data slice'n'dice series:

- NAICS 541850 Display/Outdoor Advertising

These data, and the overarching year-to-year trends, like other demographic data, can be used not only for business planning and forecasting, but also sales and marketing resource allocation.

Printing Impressions – January 16

CJK Group Acquires North American Logistics and Supply Chain Services Company



CJK Group, Inc. announced the completion of its acquisition of substantially all of the assets of WLX|WLE (doing business as WLX and Western Logistics Express), from the R&R Express family of companies. Headquartered in Kansas City, Missouri, WLX|WLE is a leading provider of full-service logistics and transportation solutions serving customers throughout the United States, Canada, and Mexico.

The acquisition represents a strategic expansion of CJK Group’s diversified portfolio into the transportation and logistics sector, reinforcing the company’s long-term commitment to investing in strong operating businesses with proven leadership teams and growth potential.

WLX|WLE will continue to operate under its existing brand and leadership, with no changes to day-to-day operations. Customers, carrier partners, and drivers can expect the same high level of service, reliability, and responsiveness that has defined WLX|WLE. For more than two decades, WLX|WLE has built a strong reputation for professionalism, on-time performance, and customized logistics solutions. The company is particularly known for its expertise in open-deck and refrigerated transportation, supporting shippers of all sizes with dependable, tailored supply chain solutions.

“We are excited to welcome WLX|WLE to the CJK Group portfolio” said Chris Kurtzman, Chief Executive Officer of CJK Group. “WLX|WLE has earned an outstanding reputation through strong leadership, deep industry expertise, and an unwavering commitment to service, values that closely align with our own. This acquisition is an important step in expanding CJK Group’s logistics capabilities, and we look forward to investing in the team and supporting continued growth for years to come. A special thanks to Sonny Catlett and his team for making the integration process smooth and successful for all.”

Sonny Catlett, President of WLX|WLE, added “My entire team and I are excited for this next chapter of WLX|WLE. Our customers, carrier partners, and drivers have experienced a seamless transition, thanks to collaborative efforts of both organizations. We remain fully committed to delivering the same high level of service, quality, reliability, and responsiveness our partners have come to expect. WLX|WLE’s customers can be confident their logistics needs remain in excellent hands.”

[Source: CJK Group](#)

Wide-format Impressions – January 16

Factoring Time and Cost Savings into the Finishing Equation



By [Rafa Menéndez](#)

The following post was originally published by [Wide-format Impressions](#). To read more of their content, subscribe to their newsletter, [Wide-Format Impressions](#).

The large-format printing industry continues to evolve at pace. Printing equipment is advancing rapidly, color gamut is expanding, and production speeds are climbing as businesses invest in the latest technologies to stay competitive. The buzz at [PRINTING United Expo 2025](#) in Las Vegas reflected this momentum, from record attendance to the sheer number of equipment launches on the show floor. Globally, according to Grandview Research, the large-format print market is projected to grow from \$9.11 billion in 2023 to \$12.70 billion by 2030, at a compound annual growth rate (CAGR) of 5%. North America currently leads the market with a 34.4% share, with the United States alone representing nearly a quarter of the global large-format printer market.

As print speeds increase and e-commerce growth fuels demand for faster delivery, customers' expectations for shorter turnaround times continue to rise. Yet, despite all the innovation in print hardware and software, one area often lags behind – large-format finishing. In many shops, finishing remains a major bottleneck. While attention typically focuses on print and prepress optimization, finishing is frequently the slowest point in the workflow. This can result in production delays, missed deadlines, and capacity limitations. Simply put, a print shop is only as fast as its slowest process, and for many, that process is finishing.

A recent Alliance Insights report, Exploring Automation in Wide-Format Printing, found that turnaround time and manual bottlenecks are two of the leading causes of slow production. 30% of survey respondents identified “turnaround time” as a critical challenge amid rising demand for quick delivery, while another 30% cited manual “workflow bottlenecks,” such as pre-press, file preparation, or finishing. These issues are compounded by workforce pressures, with 44% of respondents indicating labor availability and 41% to high labor costs as major concerns. Together, these challenges create what the report describes as “a layered set of obstacles” driven by labor shortages, manual tasks, inconsistent job volumes, and fragmented workflows – all of which can be mitigated through finishing automation.

What Does Large-format finishing Automation Look Like?

From cutting media to size and welding hems, to adding grommets or sewing textile edges or SEG strips, finishing encompasses multiple steps essential to turning printed materials into deliverable products. In large-format, many of these steps remain manual and time-intensive. For instance, welding long rolls of banner material often requires two operators to feed and refeed heavy media, while manually placing grommets along the edge. Likewise, sewing textile signage is laborious and requires a higher level of skill than most other finishing tasks, which slows production and creates quality-control risks.

Each of these processes presents an opportunity for automation. Upgrading from a manual grommet press to a semi-automatic or fully-automatic press, or investing in an electric media roll lifter, can save considerable time and reduce physical strain on operators. Conveyor belt systems synchronized with welders can streamline longer seams and reduce handling errors. For some producers, fully integrated finishing lines that combine cutting, welding or sewing, and grommeting in a single workflow can offer an even greater advantage. Such platforms ensure precise grommet placement using camera guidance, simplify handling for single operators, and reduce finishing’s overall footprint on the production floor. Taking a holistic view of how each job moves through the shop helps identify these opportunities. Mapping the entire journey, from the moment the media roll is loaded to the moment the finished graphic is packed, often reveals where incremental automation can have the most significant impact.

Prioritizing Finishing to Gain a Competitive Edge

Investment decisions in large-format printing are rarely made lightly. New equipment requires substantial capital, and many businesses view purchases such as printers or software as the priorities. Yet, the finishing stage deserves equal consideration. The time and labor savings achieved through finishing automation can offset the initial cost faster than many anticipate.

Finishing automation reduces the number of operators required per job, lowers the skill threshold needed for consistent results, and minimizes errors that lead to rework. Space saving solutions integrating multiple finishing processes also free up valuable floor space for other equipment. In short, investing in finishing not only improves productivity, but it also creates long-term operational efficiency.



- Credit: Probo

One company that is prioritizing large-format print finishing is the Michigan-based event fabrication company, Britten Inc. Over 50% of Britten’s revenue comes from printed signage, with a team of 40 making up its sewing department. Historically, the company had struggled to find a solution to automate its large-format print sewing. However, since identifying sewing finishing as a significant bottleneck, Britten has invested in a Hybrid TexWiz banner finishing platform featuring integrated sewing automation for hems from PLASTGrommet as part of a wider investment worth over \$1 million to automate its large-format print finishing department. The hybrid nature of the platform also offers system redundancy, which is a priority for Britten.

Probo, a trade printer with facilities in the Netherlands and Germany, is another example. Supporting over 12,000 print professionals with over 300,000 product combinations and over 280 materials being produced, Probo needed a way to boost its banner finishing capacity without compromising turnaround or quality. To meet this goal, the company adopted the fully integrated banner finishing platform All In One and was able to expand its share of business with existing customers while capturing new opportunities for higher-volume runs. The investment not only improved throughput and consistency but also enabled the company to consolidate its fence banner production, reducing outsourcing and improving control over scheduling and quality.

Factoring Time and Cost into Sourcing Decisions

When evaluating equipment or materials, printers naturally focus on output speed and print quality. However, factoring in time and cost savings across the entire workflow can reveal additional opportunities for return on investment. The sourcing process shouldn’t stop at the printer and, considering how much media is handled, finished, and shipped can have an equal if not greater effect on overall profitability. For example, automated systems that reduce the number of touchpoints between printing and packing translate directly into time savings. Similarly, consumables and materials that align with automation, such as using an automatic welder for welding banner edges, means you don’t need a consumable like a double-sided tape, which can save money and time, and help to streamline downstream processes. Even accessories like media roll lifters or integrated safety tools can contribute to safer, faster workflows that prevent downtime and injuries.



- Credit: Britten Inc.

When sourcing finishing equipment, some key considerations can include the number of operators the process currently requires and how automation might reduce this; whether finishing can currently keep up with the printer's output; whether automation will lower or eliminate recurring costs, such as for tapes and adhesives; and whether the equipment would improve workspace organization and reduce manual handling risks and injuries. Businesses that assess these factors holistically will often find that true cost savings emerge not from the initial purchase price, but from cumulative gains in speed, safety, and consistency.

As print technology continues to evolve, the conversation around productivity will increasingly extend beyond the press. Finishing is no longer the quiet end of the process. It's a strategic opportunity for efficiency and growth, and the most successful print businesses will be those that view sourcing decisions with an entire view of production. Whether through incremental upgrades or integrated systems, the goal remains the same: To remove bottlenecks, reduce waste, and enable teams to deliver more in less time.

The print shops that invest carefully and strategically in this area of production will set the pace and retain a competitive advantage over those who continue to overlook their finishing bottlenecks.

Printing Impressions – January 15

RRD Research Reveals What Marketers Are Looking For in 2026



By [Toni McQuilken](#)

We sat down with Andy Johnson, head of [Iridio by RRD](#), for a quick chat about the company’s latest research report, focusing on marketing trends. He shared some insights and takeaways for printers.



Iridio’s 2026 Marketing Predictions report found that 53% of marketers cite human interaction replacement and AI deception as top threats to consumer trust, 55% name AI and machine learning as a top 3 tech investment, and 78% of marketers plan to use AI for personalization and improved customer experience.

PI: Can you give us a brief overview of the report - what it was, who was included, etc.

AJ: Iridio’s 2026 Marketing Predictions Report is an analysis of company marketing priorities, challenges, and forecasts for the year ahead. Fielded in August and September of 2025, the study surveyed 600 U.S. marketing decision-makers at the manager level and above, across a wide range of key industries. The report highlights how these leaders are prioritizing their efforts, revealing that economic volatility is their top concern.

PI: What were the biggest trends that emerged from the report?

AJ: The biggest trend emerging from Iridio's report is the flight to efficiency driven by economic uncertainty. With 56% of marketers citing volatility as their top source of uncertainty, we are seeing a decisive shift toward measurable, high-return channels. Budgets are increasing for digital tactics, such as online video (59%), websites (57%) and paid social (56%).

AI has also moved from experimental to essential. AI and machine learning is now the top technology investment (55%), with marketers using it specifically to scale personalization and predictive analytics.

PI: Were there any surprises? If so, what were they?

AJ: One surprise is the trust paradox facing AI. While AI is the number one tech investment for 2026, marketers still view it as a threat to consumer trust. The data found that 53% of marketers cite human interaction replacement and AI deception as top threats.

Also, despite the massive industry hype around technology, it's telling to see economic volatility still holding the top spot as the number one concern, proving that fundamental market conditions still outweigh technological disruption in planning.

PI: What would you say are the biggest takeaways for printers?

AJ: The report reveals not a retreat, but a recalibration of print spend into a broader omnichannel strategy. Marketers are prioritizing the connection between physical and digital touchpoints to meet consumers where they are. To win budget in 2026, print must prove it is just as measurable and high impact as its digital counterparts.

PI: Based on these findings, what advice would you give printers looking to connect with marketers as we head into 2026 and beyond?

AJ: Printers must evolve from transactional vendors into data savvy strategic partners who can prove their value. With 78% of marketers prioritizing personalization and a clear flight toward measurable channels, success lies in offering variable data solutions and attribution tools that demonstrate ROI. Additionally, as marketers rely on external vendors to provide agility and scale, printers should position themselves as high performance partners who can help them maximize efficiency even within tightened budgets.

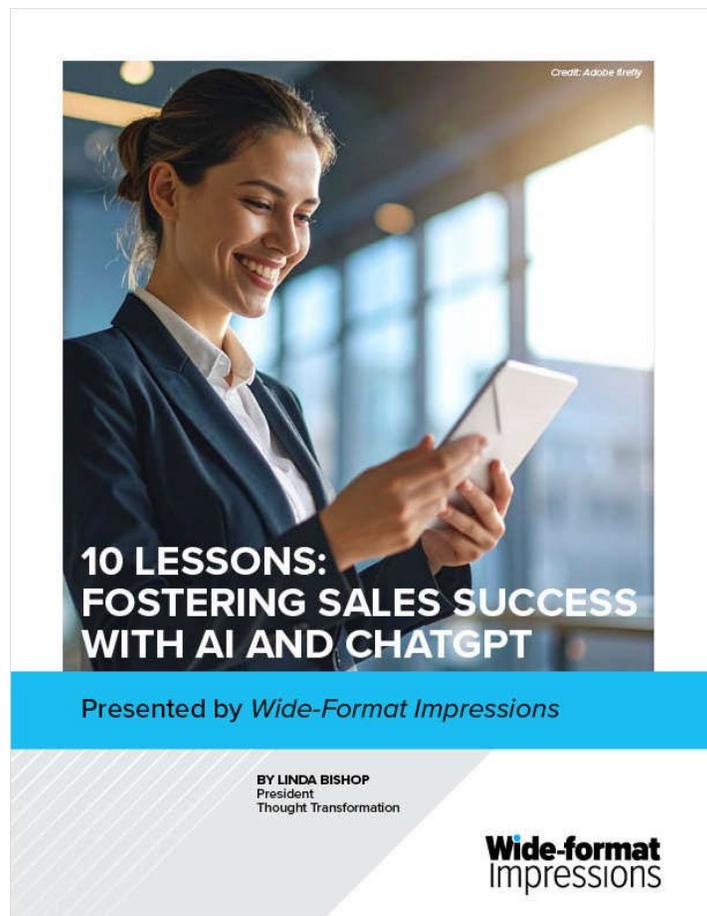
Wide-format Impressions – January 14

10 Lessons: Fostering Sales Success with AI and ChatGPT

Do you struggle to write prospecting emails? Would you like to quickly research the challenges your prospect faces when preparing for a meeting? Or maybe you need a meeting agenda or want to clean up your meeting notes so you can share them with your client. Artificial intelligence (AI) might be the solution.

Maybe you need a presentation, want to turn a customer success story into a case study, or you want to improve your LinkedIn profile. AI gets it done. Perhaps you wish you had better closing skills, could get input in solving a sales problem, or wish you could gather a critique on the email you plan to send after a client meeting. AI could be the solution.

Attached to the email as a separate report.



Wide-format Impressions – January 6

2026 Is Not the Year to 'Try' AI

It's the year to decide what you're building and who you're becoming.



By [Amy Servi-Bonner](#)

The following post was originally published by [Printing Impressions](#). To read more of their content, subscribe to their newsletter, [Today on PIWorld](#).

2025 was the year AI stopped being optional for print and packaging companies.

Not because it was easy.

Not because it was perfect.

But because ignoring it stopped being a responsible choice.

By the end of 2025, AI was no longer confined to innovative teams or side projects. It showed up in estimating, in customer demands, in procurement conversations, and in boardrooms asking the same question over and over: “Why are we behind?”

For most organizations, AI didn’t enter through a plan. It entered through disruption.

And that’s not a bad thing. Disruption wakes people up.

But 2026 is not the year for curiosity, pilots for the sake of pilots, or another round of “let’s see how this goes.” 2026 is the year to get serious about readiness, strategy, and execution.

And that starts with understanding a hard truth the industry is still dancing around: Not all AI approaches are created equal, and choosing the wrong one will cost you more time, money, and credibility than doing nothing at all.

The Fork in the Road: Tools Versus Capability

As we head into 2026, print and packaging leaders with real budgets and real intent are facing a clear fork in the road.

On one side:

Off-the-shelf AI platforms

On the other:

Custom AI agents and agentic systems designed around your business

Both have a place.

Only one creates durable advantage.

Off-the-Shelf AI Platforms: Fast, Familiar, Limited

Off-the-shelf AI tools such as Copilot, ChatGPT Enterprise, workflow automation platforms, and AI features embedded inside ERP or MIS exploded in 2024 and 2025 — for good reason.

They’re:

- Easy to buy.
- Easy to pilot.
- Easy to justify.

For many organizations, they were the *first real exposure* to AI in daily operations.

And that’s fine. I get it.

These tools are excellent for:

- Helping individuals work a little faster.
- Automating the easy stuff.

- Acting as a smart assistant, not a decision maker.
- Experimenting without real risk.
-

What off-the-shelf AI platforms are not designed to do is:

- Improve how the business operates, not just how people work.
- Automate decisions and workflows, not just tasks.
- Understand your data, your rules, and your constraints.
- Create an advantage, not just avoid risk.

By design, off-the-shelf platforms create shared advantage.

Your competitors are using the same tools.

With the same features.

On the same roadmap.

That doesn't make them bad tools.

It makes them a starting point.

Tools are not a strategy. I say that often because it's true. And if your AI approach stops here, your upside isn't just capped, it's predefined.

Custom AI Agents: Where Strategy Becomes Capability

Custom AI agents are different — not because they're flashier, but because they're *owned*.

A custom AI agent:

- Operates inside your workflows.
- Understands your data structures.
- Follows your rules and constraints.
- Learns from your historical patterns.

In printing and packaging, that might mean:

- Agents that understand estimating logic.
- Agents that monitor production exceptions.
- Agents that orchestrate data across ERP, MIS, scheduling, and customer systems.
- Agents that automate decisions — not just tasks.

This is where AI stops being a tool and starts becoming infrastructure.

But here's the catch: Custom AI isn't a software project; it's more than just writing code. It's about intentional design and how systems are built to operate over time.

And this is where many companies will get it wrong in 2026.

Not All 'Custom' Is Equal: Consultancy Versus Code Shop

One of the more common assumptions — and often a point of pride — I see heading into 2026 sounds something like this: “If we need custom AI, we’ll just hire a developer.”

That instinct isn’t wrong. It’s familiar, and for a lot of things, it works.

It works for websites.

It works for integrations.

It works for building features against a clear specification.

Where it starts to break down is with agentic AI systems.

Because once AI is expected to make decisions, move work across systems, and operate inside real business constraints, the challenge stops being “Can someone write the code?” and becomes “Should this system behave this way at all?”

That’s the distinction leaders need to understand going into 2026.

General Custom Software Developers

Traditional custom developers are excellent at:

- Writing code to a spec.
- Building applications.
- Connecting APIs.
- Delivering features.

Their pricing model reflects this:

- Project-based.
- Feature-driven.
- Scope-defined.

What they typically do not provide:

- AI readiness assessments.
- Data governance strategy.
- Model selection and life cycle planning.
- Risk management for AI behavior.
- ROI measurement tied to operations — remember, if AI doesn’t hit the P&L, its just entertainment.

They build what you ask for — even if it shouldn’t exist.

Agentic AI Development Teams

Agentic AI development teams operate differently.

They start with:

- Readiness before design.
- Strategy before code.
- Governance before scale.

Their work includes:

- Designing multi-agent systems.
- Defining decision boundaries.
- Engineering human-in-the-loop workflows.
- Managing data sovereignty and IP ownership.
- Aligning AI capability to financial outcomes.

Their pricing reflects that reality:

- Fewer “features,” more architecture.
- Ongoing advisory and refinement.

You’re not paying for lines of code. You’re paying for judgment. And in AI, judgment is everything.

The Pricing Reality (2026 Outlook)

As companies head into 2026, the conversation around AI investment needs to mature.

Off-the-shelf AI platforms are inexpensive and fast to roll out. They deliver quick wins, but the upside is limited and shared with every competitor using the same tools.

Custom software development sits in the middle ground. It offers flexibility and execution speed, but without a clear AI strategy, it often trades short-term progress for long-term risk.

Agentic AI development requires a higher upfront investment. In return, it creates something fundamentally different: ownership, control, and advantage that compounds over time.

For organizations with the budget and commitment, the real question isn’t “Can we afford this?” It’s “Can we afford to build AI without a plan?”

2026: The Year of Readiness, Strategy, and Execution

2025 was the wake-up call.

2026 is the response.

The companies that win this year will:

- Stop experimenting blindly.
- Get honest about their data and processes.
- Choose ownership over convenience.
- Invest in AI as capability, not a novelty.

This doesn't mean boiling the ocean. It means starting correctly.

Readiness assessments.

Clear prioritization.

Intentional partner selection.

Disciplined execution.

No more delays.

No more "next quarter."

No more pretending AI is just another software upgrade.

Because the printers and packaging companies that treat AI like infrastructure in 2026 will not just survive the next cycle, they'll define it.

And the rest will spend the year catching up.

Printing Impressions – January 5

RIT Merges Print and Graphic Media Degree Into Packaging Science Program



By [Mark Michelson](#)

Many printing industry leaders — both past and present — attended the Rochester Institute of Technology (RIT) to earn a bachelor’s degree in printing. Dating back to 1922 and long considered the premier program for the graphic arts industry, it drew trade and high school graduates who often hailed from family-owned printing businesses. In 1981, RIT’s printing program peaked with 775 students, learning business management and hands-on (primarily sheetfed and web offset) production operations skills.

So, it’s no surprise that some of the roughly 4,000 active alumni are disheartened to learn that RIT’s print and graphic media technology curriculum, which has experienced several years of declining enrollment, is being integrated into the university’s packaging science program.

Currently enrolled undergraduate and graduate students in the print program will complete their coursework to graduation, according to Kyle Dunno, packaging and graphic media science department chair in RIT’s College of Engineering Technology (CET). Armed with packaging science undergraduate and graduate degrees from Clemson University, followed by experience out in the field, Dunno joined RIT in 2018 to chair the school’s packaging science programs. In 2022, CET combined its printing and packaging science departments.

“For generations, the print and graphic media program has played a vital role in preparing students to lead in the printing, publishing, and media sectors,” Dunno acknowledged in a prepared statement. “As print technologies have advanced and the industry has evolved, we’ve reflected deeply on how best to honor that legacy while preparing our students for future opportunities,” he added. “This strategic integration maintains the core of print education at RIT while expanding its relevance in the rapidly growing packaging and converting industries.”

The new curriculum is focused on manufacturing, materials, color management, and package printing and converting technologies. Coursework includes premedia, production workflows, converting technologies, process control, and variable data printing — and their applications to folding cartons, flexible packaging, labels, corrugated fiberboard, metal decoration, and more.

Lack of Students Seeking Printing Degrees

In a recent phone call with *Printing Impressions*, Dunno and Bill Pope, professor of practice, packaging, and graphic media science, explained that the shift in focus was an inevitable progression. With tuition at the private university (RIT is not part of the SUNY public university network) costing approximately

\$50,000 per year, they acknowledged that recruitment for students seeking a college degree in printing technology has been quite challenging.

Dunno and Pope noted that public perception — shaped in part by the decline of printed newspapers — is that print is a shrinking industry with limited career opportunities to warrant the expense of a four-year college degree. In contrast, there will always be a strong demand for package printing and converting.

Pope said RIT's packaging science program, which has been crafted with the assistance of industry advisory boards and curriculum committees, enables graduates to be hired as material and packaging engineers, brand owners that specify packaging, and as technical support personnel, among other positions. "An engineer that also has print knowledge is a valuable skillset," according to Pope, who himself is a 1990 RIT graduate.

Starting salaries can range from the mid-\$70,000 to low \$80,000 range for those with undergrad packaging science degrees, Pope added, and from the mid \$80,000 to low \$90,000 range for master's degree program graduates.

He described RIT's new STEM-based packaging science program within the College of Engineering Technology as being unique. Its focus is on the technologies and materials science driving the package printing and converting industry forward, in comparison to the degrees geared more toward package design or graphic arts design being offered by some other universities.

This integration reinforces the college's focus on industry-relevant applied science and engineering education, agreed S. Manian Ramkumar, dean of the CET. "By connecting core competencies from both print and packaging, we are ensuring our students gain hands-on, future-oriented experiences that align with evolving workforce needs," he said.

Research and Testing Services to Continue

Both packaging and printing faculty researchers (including the 2021 hiring of longtime Cal Poly professor Malcolm Kief) will still provide support to the printing industry through the department's existing testing, research, and training services.

In addition, RIT will continue to serve as the certifying body for the PRINTING United Alliance's G7 and G7+ color calibration programs, supporting the industry's adoption of globally recognized color quality standards and processes.

Nevertheless, the end of a commercial printing industry-focused degree program at RIT, which dates to the early 1920s, may be a hard pill to swallow for many of its past graduates. "[We're] not killing print," Dunno concluded, acknowledging the printing program's rich history and prominence. "When the wind changes direction, you've got to adjust your sails."

What They Think – January 5

Robotics in Production Print: A Turning Point for the Industry

Robotics is reaching a tipping point in production print, moving from experimental to essential as shops look for answers to labor shortages, bottlenecks, and rising productivity demands. Yet new Keypoint Intelligence research shows that while interest is surging, buyers still want proof: real-world use cases, reliable performance, seamless workflow integration, and partners who understand print. This article explores why robotics adoption is accelerating, what's holding some providers back, and how your peers are evaluating the next wave of automation. If you're considering robotics—or questioning whether the industry is truly ready—this is the insight you need.

Friday, December 12, 2025

By David Sweetnam and Mark Boyt, Keypoint Intelligence

The print industry has reached a moment where robotics is no longer a distant concept. For years, these systems were seen as relevant only to automotive or electronics manufacturing. That view is changing quickly. In many production environments today, a robotic arm may be lifting boards onto a flatbed, stacking finished books, or moving printed textiles into drying tunnels or fold and pack stations. More print providers now see robotics as a practical way to address labor shortages, eliminate workflow bottlenecks, and maintain consistent output across long shifts.

Even with this momentum, the industry still has essential questions. Who is adopting robotics? What goals are driving investment? And where do the biggest barriers remain? Keypoint Intelligence is launching a global study to answer these questions using input from commercial printers, converters, label operations, packaging producers, and wide format shops.

Why Robotics Is Gaining Momentum

Productivity has become a defining pressure point. Press speeds continue to increase, but the surrounding tasks such as loading substrates, unloading stacks, inspection, and material movement often slow the process and require skilled labor. Robotics streamlines these repetitive steps so people can focus on work that requires judgement and experience.

Across conversations with print providers, four themes appear most often:

Labor shortages remain a constant challenge: Skilled operators are difficult to recruit and retain. Robots can take on heavy, repetitive tasks and run overnight, giving shops more resilience and reducing physical strain on teams.

Predictability drives higher productivity: Automated loading, unloading, and palletizing reduce pauses between jobs. A flatbed with robotic board handling or a bindery line using automated pallet loading typically sees smoother throughput and more sellable output.

Quality improves when repeatable steps are automated: Robots do not fatigue or lose focus. With vision systems and precise grippers, alignment stays consistent and substrates are handled gently. When paired with AI-driven inspection, defects are caught earlier and quality control becomes more reliable.

Short-run and mixed-volume environments benefit more than expected: Modern robotics platforms adapt quickly to frequent job changes. This flexibility suits signage, corrugated, textile, and other markets where formats and run lengths shift throughout the day.

The Economics Behind the Investment

For most adopters, robotics is not about eliminating jobs. It is about helping the existing team produce more with fewer interruptions. Many operations report saving the equivalent of one or two full-time roles per line while improving uptime. Even small boosts in utilization can deliver significant annual margin gains. Early adopters also note that payback periods are often shorter than expected once workflows stabilize and operators gain confidence with the system.

The Barriers That Still Hold Businesses Back

Robotics is expanding, but it is not yet standard across print. The chart below highlights the top concerns expressed by print providers. The common thread is trust. Buyers want proven use cases, proven reliability, peer recommendations, and partners who understand print workflows rather than general automation. They need to know the system will work in their environment, deliver measurable ROI, and come with dependable long-term support. These expectations present a significant opportunity for OEMs and workflow providers to close the trust gap and demonstrate real-world performance.

