

# Print Reloaded: Trends Driving Reinvention and Strategic Investment



**ENGAGE360**  
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# TODAY'S SPEAKERS

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**Lisa Cross**



**Principal Analyst  
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# ABOUT ALLIANCE INSIGHTS

- Alliance Insights (formerly NAPCO Research) is part of the PRINTING United Alliance and serves the printing, packaging, publishing, marketing, retail, nonprofit, and promotional products industries.
- Capabilities
  - Data-driven insights
  - Actionable research
  - Expert analysis
  - Strategic Content
  - Market Intelligence
  - Market Sizing & Forecasting
  - Consulting Engagements
  - Sales Training
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Elitron  
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turnkey™  
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**ALLIANCE**  
INSIGHTS

# RECENT RESEARCH REPORTS



**AI Adoption in the Printing Industry: From Curiosity to Competitive Advantage**



Sponsored by Print ePS and Koenig & Bauer



**Artificial Intelligence in the Printing Industry: The Journey Begins**

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



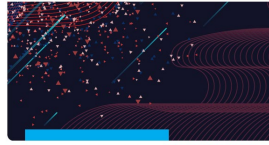
**Next Generation Inkjet Investment**



NAPCO RESEARCH



**Production Digital Printing 2025: Setting the Course to Thrive in the Year Ahead**



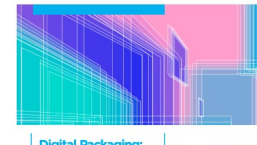
NAPCO RESEARCH



**Digital Packaging: The Pursuit of Prosperity**



NAPCO RESEARCH



**Digital Packaging: Opportunities to Thrive**



NAPCO RESEARCH



**The Production Inkjet Application Revolution**



NAPCO RESEARCH



**Direct Mail and Digital Media: A Winning Strategy Combination**



NAPCO RESEARCH



**Direct Mail: Delivering Strong Opportunity for Commercial Printers**



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



**Web Portals, New Path to Print Profitability**



NAPCO RESEARCH



**Understanding the Mindsets of Sign and Display Graphic Buyers**



NAPCO RESEARCH



**Converting New Customer Dynamics & Preferences into Print Sales**



NAPCO RESEARCH



**Convergence in Print: A Shift to the New Normal**



NAPCO RESEARCH



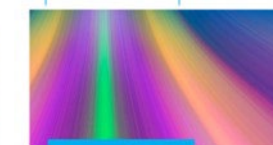
**Critical Considerations When Evaluating B2 Digital Production**



NAPCO RESEARCH



**Who Buys Wide-format Display Graphics: How, from Whom, and Why**



NAPCO RESEARCH



**Enhancing Book Publishers' Ability to Respond to Changing Market Demands**



NAPCO RESEARCH



# STATE OF THE INDUSTRY AND PRINT BUSINESS OUTLOOK SERIES

**All SOI and PBOS reports are generously sponsored by Canon U.S.A., Inc.**

Alliance members can download at [printing.org](https://printing.org)

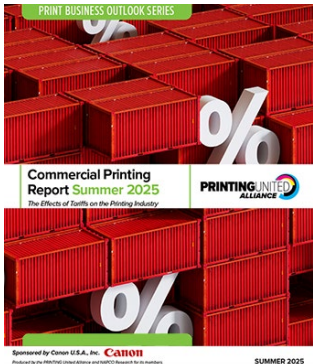
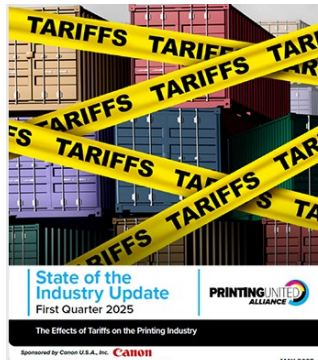
## JOIN OUR RESEARCH PANEL

State of the Industry Panel members have **access to proprietary reports** on the **printing industry's performance, prospects, critical issues and defining trends** and on how to make those issues and trends an opportunity rather than a threat.

**Participation in the panel requires completing a 10-minute State of the Industry Survey four times per year.** All survey response are strictly confidential.

**Use this link to join our business panel:**  
**[research.net/r/CV19PREX](https://research.net/r/CV19PREX)**

**JOIN NOW**



# TODAY'S DISCUSSION: PRINT INNOVATION FORCES

1. Persistent Economic and Competitive Pressures
2. Digital Disruption Accelerating Change and Reshaping Competition
3. Expansion into New Markets and Applications Unlocking Growth
4. Artificial Intelligence From Curiosity to Competitive Advantage
5. Changing Customers, New Characteristics, and Demands
6. PRINTING United Expo: The Stage for Innovation

# 1. PERSISTENT ECONOMIC AND COMPETITIVE PRESSURES



# THE ECONOMIC ENVIRONMENT

**Q. What are the biggest risks facing your company this year?**

**Majority reported the following:**

- Downturn in economy/recession **79.4%**
- Tariffs and their effects on costs and supply chains **62.5%**
- Economic uncertainty created by Washington **55.9%**
- Persistent operating cost inflation **50.0%**



Source: PRINTING United State of the Industry Report 2025, Turning Uncertainty into Opportunity (Sponsored by Canon U.S.A., Inc.)

# INDUSTRY CHALLENGES

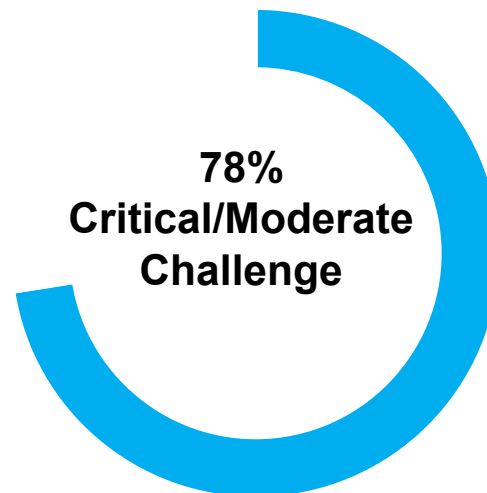
## Cost Inflation



## Economy/Business Conditions



## Maintaining Profitability



## Price Competition



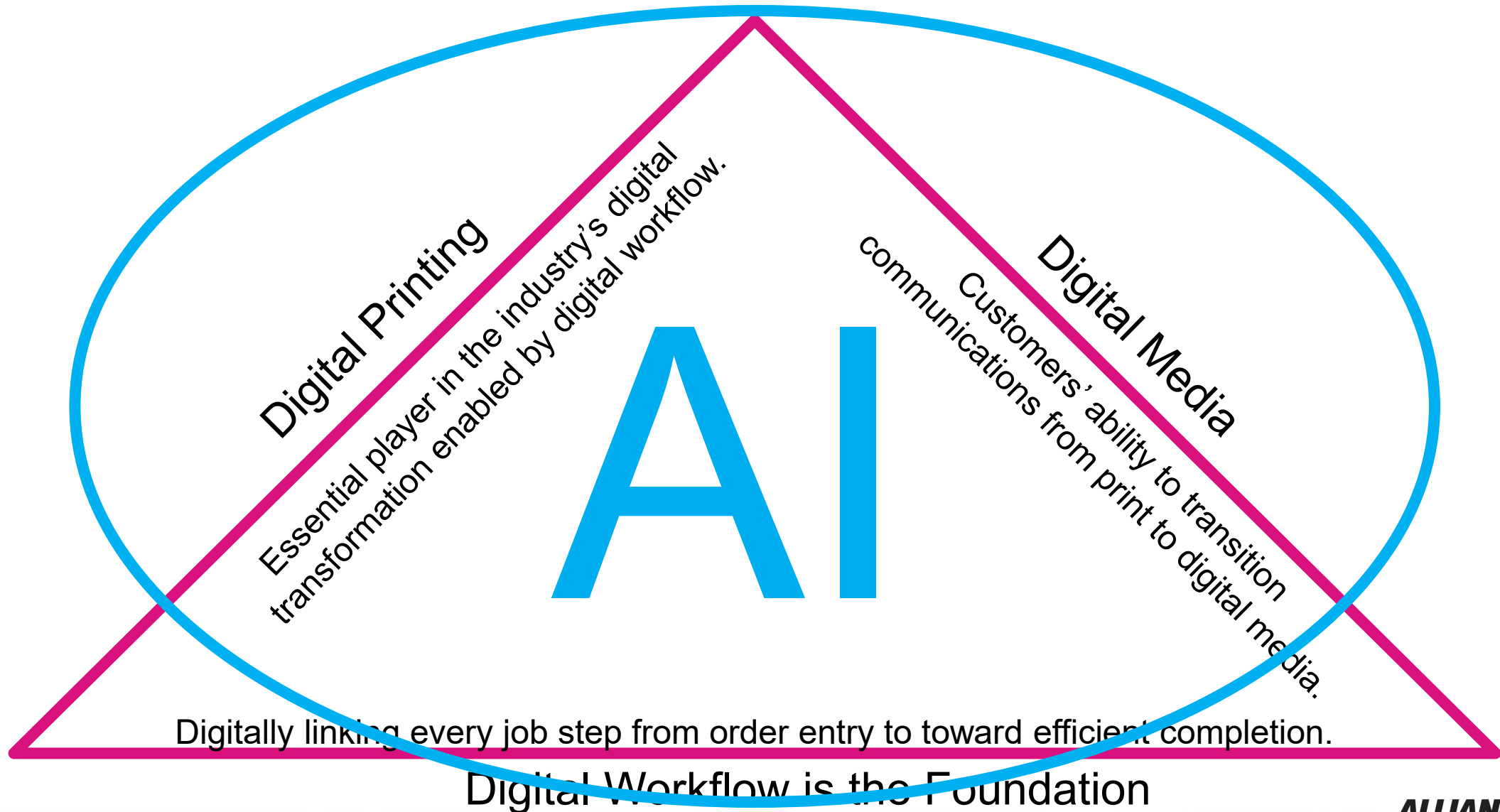
n= 173 Print Providers

Source: NAPCO Research Annual Commercial Print Industry Trends and Strategies Service, 2024

## 2. DIGITAL DISRUPTION ACCELERATING CHANGE AND RESHAPING COMPETITION

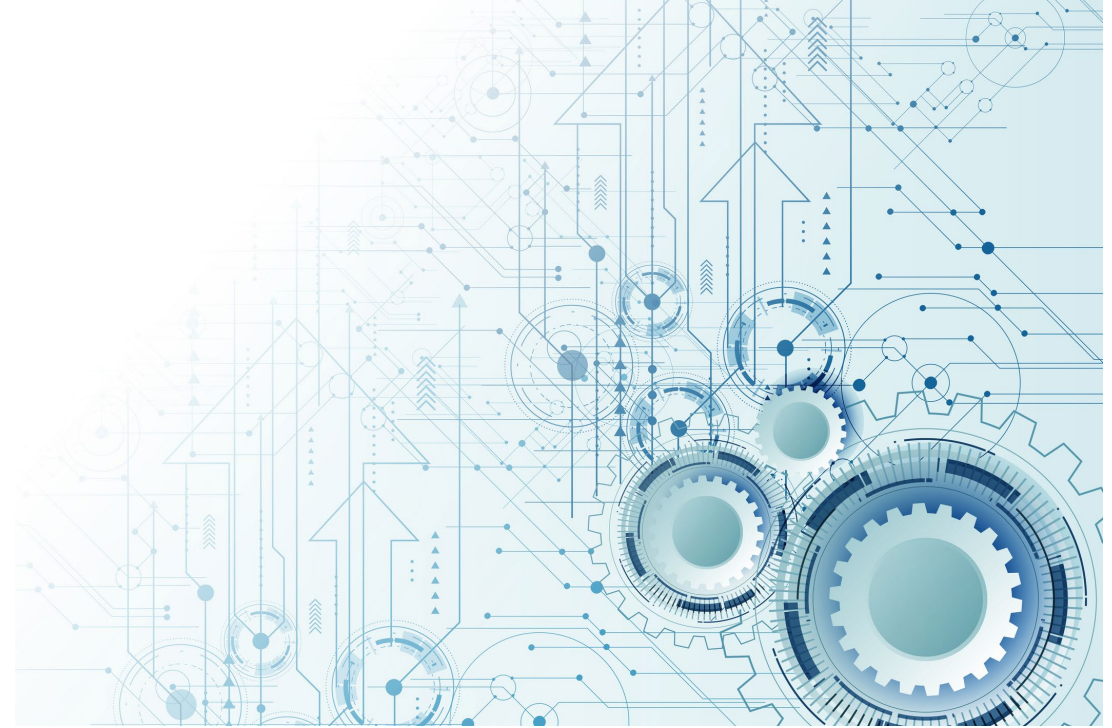


# KEY INDUSTRY CHANGE AGENTS



# DIGITAL WORKFLOW AUTOMATION ACCELERATORS

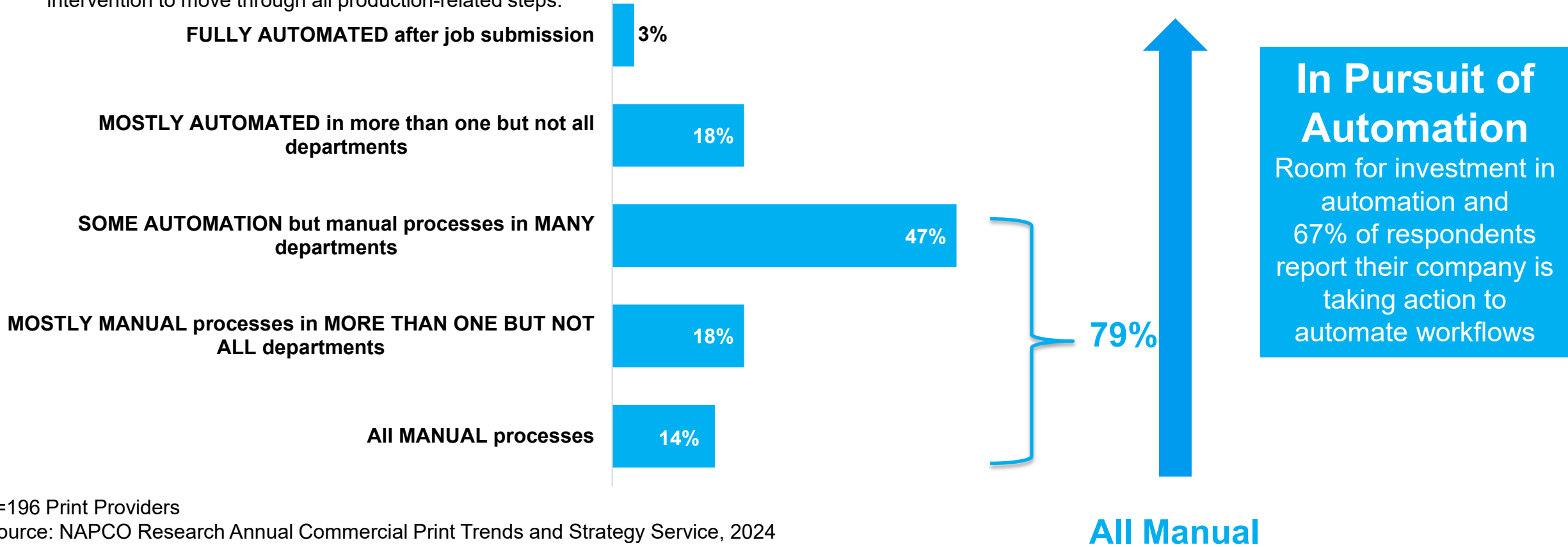
- Automation is accelerating as print service providers strive to reduce labor dependency and increase throughput.
- Labor shortages and rising wages are compelling printers to invest in automated workflows, robotics, and inline finishing systems.
- Automation allows companies to streamline prepress, press, and postpress operations, reducing errors, improving turnaround times, and supporting lights-out production.



# ROOM TO AUTOMATE OPERATIONS

## Q. What best describes your operation's level of workflow automation?

**Definition:** Fully Automated means that after a job enters the workflow it needs no further operator intervention to move through all production-related steps.





# ONLINE ORDERING OPTIONS DELIVERING BENEFITS

## Customer Prefer Providers with Online Ordering Options

- **82%** prefer print providers that offer online ordering options that enable controlling print spending and brand management
- **60%** report managing and ordering print products via a customized online ordering portal provided by their print provider

n=167 Communication Buyers and Influencers  
Source: NAPCO Research 2024

## Benefits of Offering Web Portals

- **43%** of print providers offer customers access to customized WEB PORTALS for order entry and materials management, 26% plan to offer in the futures
- Those offering customized web portals report the following benefits:
  - **89% Shortened** the customer buying process
  - **88% Strengthened** our customer relationships
  - **81% Increased** our sales from current clients
  - **75% Increased** print order volume
  - **75% Enabled** our organization to go after and win larger clients
  - **67% Enabled** our organization to expand services (i.e., offer personalization, promotional products, sign and display graphics)
  - **67% Reduced** labor costs
  - **63% Insulated/protected** us from customer vendor consolidations

n=196 Print Providers  
Source: NAPCO Research Annual Commercial Print Trends and Strategy Service, 2024

## DIGITAL PRINT: NEXT-GENERATION INKJET INVESTMENT

Steady **advances** in **press technology**, **substrates**, **inks**, and **customer acceptance** have **expanded** commercial printers' and in-plants' **adoption** and **additional investment** in production inkjet presses.



# KEY BUSINESS BENEFITS OF INKJET

**Q. What benefits, if any, has your organization experienced as a result of adding production inkjet?**

- Enhanced profitability **65%**
- Generated new business **62%**
- Increased personalization/versioning capabilities **54%**
- Reduced per job costs **50%**
- Reduced labor costs **37%**
- Replaced other multiple devices with inkjet **33%**

**Only 2% report not experiencing benefits**

n=52 Print Providers with Production Inkjet  
Source: Next Generation Inkjet Investment, NAPCO Research 2025



40% Plan to Update  
Existing Investment in  
Production Inkjet in  
the next 24 months.



# INKJET BENEFITS BY THE NUMBERS

Q. By what percentage has production inkjet increased or decreased...

...your production waste?

**-10.0%**

n=56 respondents that operate production inkjet press(es)

...number of press operators?

**-1 person**

n=56 respondents that operate production inkjet press(es)

...your organization's profits?

**+9.4%**

n=48 respondents that work for pay to print organizations and operate production inkjet press(es)

Source: Next Generation Inkjet Investment, NAPCO Research 2025

## Respondents reported in open-ended questions:

- Increased productivity with lower operating costs.
- More applications to offer clients.
- Replace offset specialty labor.
- Less labor needed for offset presses.
- Easier to operate, lower operating costs.

# IN THEIR OWN WORDS: REAL-WORLD IMPACT OF INKJET

Q. How has production inkjet impacted their organization's productivity and/or profitability?

- “Increased uptime and overall production speed have allowed us to take in more work. The cost per page has come down, allowing us to charge less and win more bids.”
- “Fewer people required to do the same work.”
- “Quicker turnaround times, less make-ready, and repeatable color.”



DOWNLOAD the REPORT  
<https://tinyurl.com/2ktv8tmz>



[https://piworld.tradepub.com/c/pubRD.mpl?pc=w\\_defa8460](https://piworld.tradepub.com/c/pubRD.mpl?pc=w_defa8460)

# PRINT IMPORTANT OMNICHANNEL COMMUNICATIONS

## Surveys Say...

Print is important to our organization **91%\***

Average number of media in a typical omnichannel communication: **4**

**81%** include print in **omnichannel campaigns**

**Top reasons organizations include print:**

- Captures attention **69%**
- Used and delivers results **52%**
- Great way to show products **48%**
- Adds credibility **45%**
- Proven ROI **44%**



\*n=167 Communication, Alliance Insights 2024

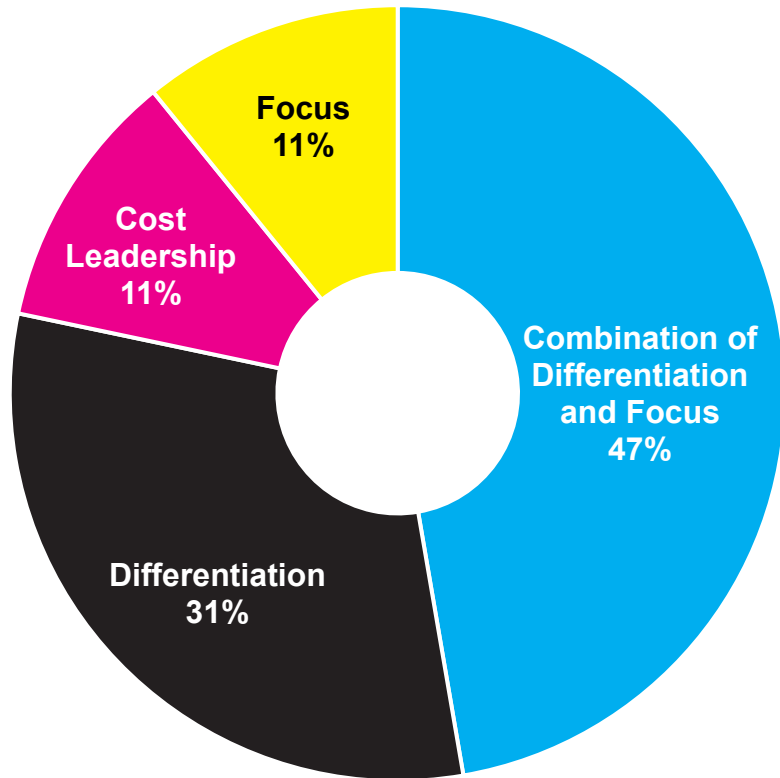
\*\*n=316 Communication buyers and influencers, Alliance Insights 2023



### 3. EXPANSION INTO NEW MARKETS AND APPLICATIONS UNLOCKING GROWTH

# GROWTH LEADERS COMPETE ON DIFFERENTIATION AND FOCUS

Q. Which competitive strategy best aligns with your organization?



n=129 Print Providers Reporting Sales Growth  
Source: NAPCO Research Annual Commercial Print Trends and Strategy Service, 2024

## Expanding Products and Services

**76%** expanding services (i.e., creative, data, mailing, fulfillment)

**70%** expect to expand product offerings in the next 12-24 months

n=111 Print Providers Reporting Sales Growth  
Source: NAPCO Research Annual Commercial Print Trends and Strategy Service, 2024

# PRINT SEGMENT MIGRATION BY THE NUMBERS

Primary Segment	Diversified Beyond Primary Segment		Secondary Segment Added					
	Yes	No	Commercial Printing	Graphic and Sign (Wide-format)	Apparel Decoration	Package Printing Converting	Functional Printing	Promotional Product Imprinting
All companies surveyed, n=647	<b>70.6%</b>	<b>29.4%</b>	<b>15.0%</b>	<b>40.5%</b>	<b>7.1%</b>	<b>17.0%</b>	<b>9.3%</b>	<b>26.0%</b>
Commercial printing, n=273	77.7%	22.3%	---	64.1%	12.5%	30.0%	7.3%	19.0%
Graphic/sign production, n=82	75.6%	24.4%	48.8%	---	14.6%	14.6%	22.0%	15.9%
Apparel decoration, n=217	60.8%	39.2%	12.9%	30.9%	---	5.5%	7.4%	44.2%
Package printing/converting, n=52	73.1%	26.9%	44.2%	25.0%	0.0%	---	11.5%	13.5%
Functional printing, n=19	57.9%	42.1%	26.3%	36.8%	0.0%	21.1%	---	0.0%

Source: PRINTING United Alliance State of the Industry Panel

# PRINT SEGMENT EXPANSION DRIVERS

- More common for print providers to **serve multiple print segments**. **96%**
- The **industry is moving toward** providers that operate across multiple print segments. **94%**
- Customers** increasingly **expect** a one-stop provider to meet diverse print needs. **90%**
- New print technology** is **making** it **easier** to expand into adjacent segments. **90%**
- Offers potential for **higher margins** **48%** and **competitive differentiation** **43%**.
- Innovations** in printing **technology**. **32%**



n=269 Print Providers

Source: **PRELIMINARY RESULTS** Profiting Through Convergence, Alliance Insights 2025



# ADDING PRINT SEGMENTS INCREASES REVENUE AND PROFIT

**15.6%**

## **Revenue Increase**

Estimated average revenue change from moving  
into a new print segment

n=215 Print Providers

**10.3%**

## **Profitability Increase**

Estimated average profitability change

n=166 Print Providers

## **Top Reason Revenues Increased When Moving Into A New Print Segment**

**54%** High Customer Demand in the Segment

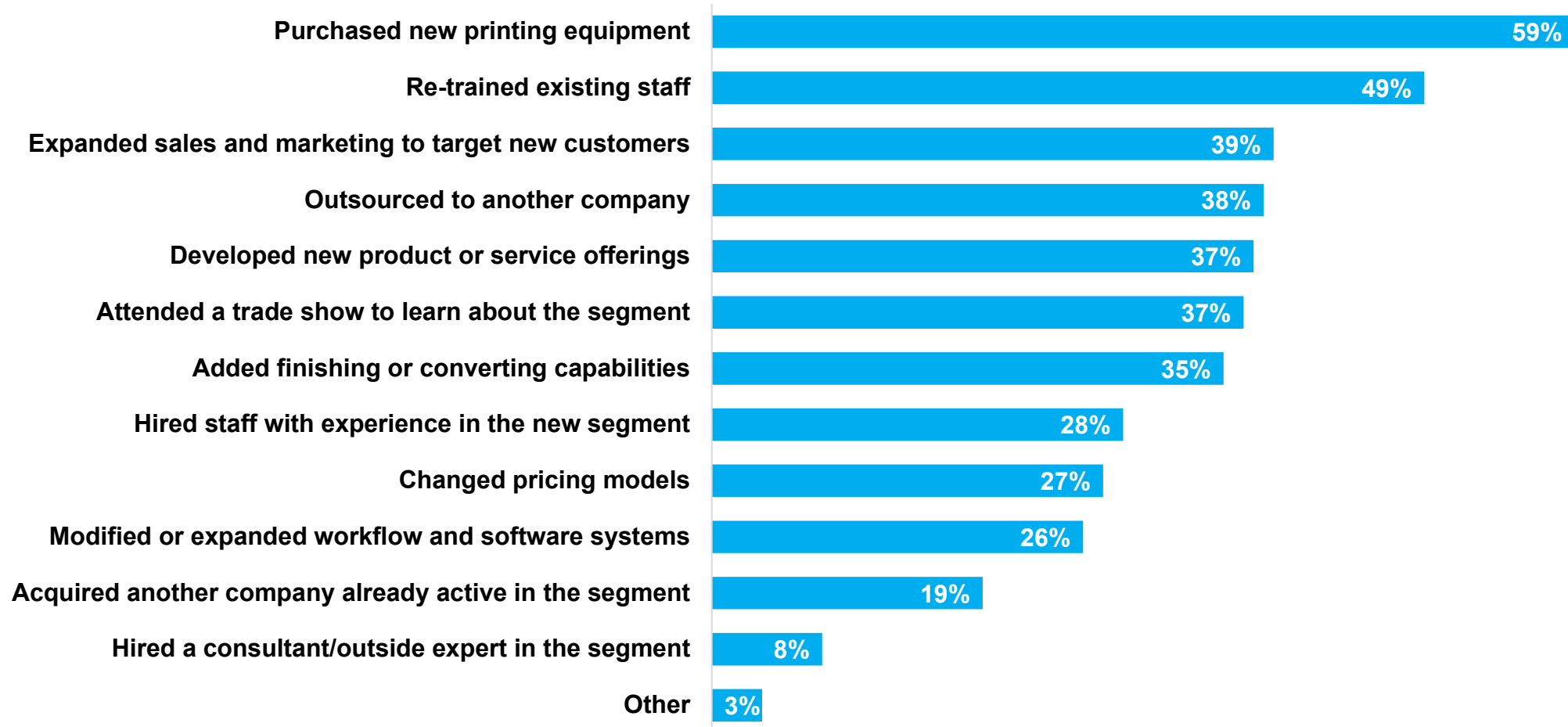
n=147 Print Providers

Source: **PRELIMINARY RESULTS** Profiting Through Convergence, Alliance Insights 2025



# KEY ACTIONS FOR PRINT SEGMENT EXPANSION

Q. Which of the following actions did your company take to enter a new print segment?



n=145 Print Providers

Source: **PRELIMINARY RESULTS** Profiting Through Convergence, Alliance Insights 2025

# OUTSOURCING BEFORE MOVING IN-HOUSE

**38%** outsourced to another company

n=146 Print Providers

## Top Reasons For Outsourcing

- Avoid upfront capital costs **67%**
- Test market demand before investing in equipment **56%**
- Offer full-service solution to existing clients **50%**

**83%** of those that outsourced brought in-house

Partnerships enable print providers to better serve customers, while gaining insight into what's required and determining the value of offering a new service.

n=54 Print Providers that Moved into a New Segment by Outsourcing

Source: **PRELIMINARY RESULTS** Profiting Through Convergence, Alliance Insights 2025

YOUR OPTIONS: PICK ONE!

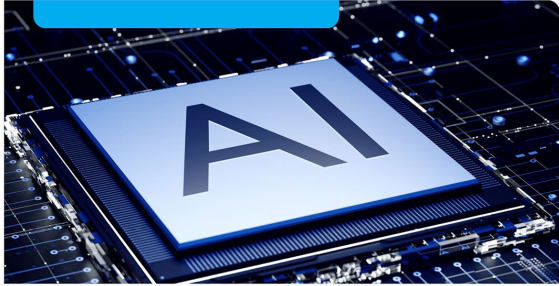




# 4. ARTIFICIAL INTELLIGENCE: FROM CURIOSITY TO COMPETITIVE ADVANTAGE

# NEW RESEARCH STUDY

<https://tinyurl.com/57krycf6>



**AI Adoption in the  
Printing Industry:**  
From Curiosity to Competitive Advantage



Sponsored by Print ePS and  
Koenig & Bauer Kyana

 **Print ePS** KOENIG & BAUER



The new study, based on input from more than 300 companies and in-depth interviews with 16 executives across commercial printing, sign and graphics, book manufacturing, and apparel decoration, reveals that:

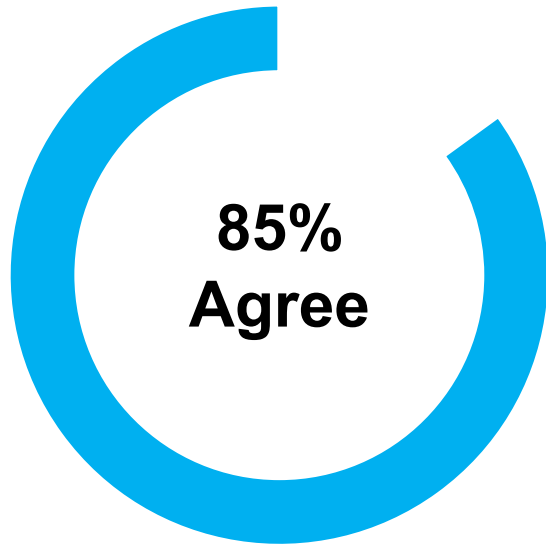
- **Artificial intelligence is reshaping the printing industry** in an entirely new way by creating competitive advantages that extend beyond faster presses, cheaper inputs, or more efficient workflows. Rather, **AI is enabling smarter operations, sharper customer insights, and innovative approaches** to creativity and automation.
- Printers are applying AI in **customer communications, estimating, prepress, and workflow automation** to achieve measurable ROI.
- **The greatest barriers are not financial, but organizational**—skills gaps, lack of clear use cases, and cultural resistance.
- Companies that **develop a roadmap and governance around AI** are already realizing stronger benefits and pulling ahead of their peers.



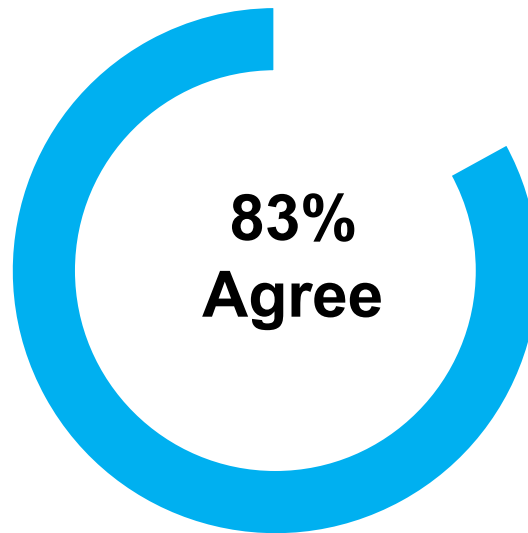
# THE POWER OF AI ADOPTION

Q. What is your level of agreement with the following statements?

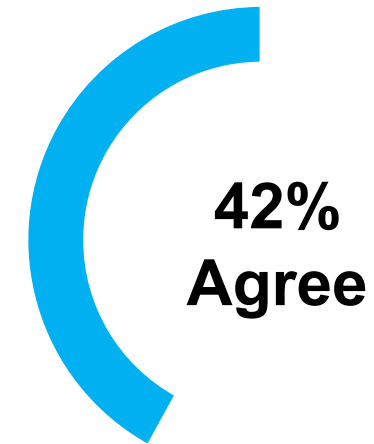
**AI is critical to staying competitive in print**



**AI unlocks new business opportunities for us**



**Firms without AI will not survive**

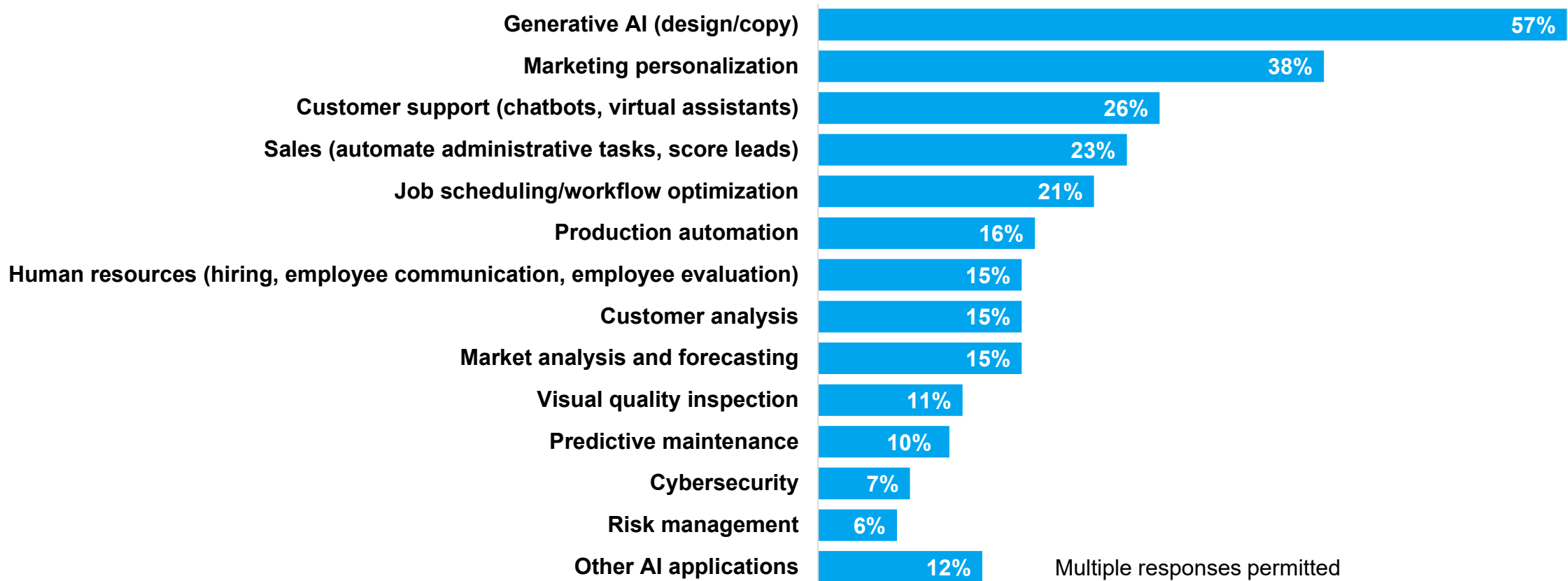


n=178 Print Providers

Source: AI Adoption in the Printing Industry: From Curiosity to Competitive Advantage, Alliance Insights 2025

# AI APPLICATIONS

Q. Which of the following AI applications are currently used in your organization? Select all that apply



n=201 Print Providers

Source: AI Adoption in the Printing Industry: From Curiosity to Competitive Advantage, Alliance Insights 2025



# AI AND THE INDUSTRY GIANTS: RRD

ARTIFICIAL INTELLIGENCE (AI), BUSINESS MANAGEMENT

September 10, 2025

## RRD Unveils AI-Powered Business Communication Intelligence Platform



RRD has launched Business Communication Intelligence (BCI), an AI-powered platform that streamlines and improves customer communications for companies in financial services, insurance, healthcare and other industries.

BCI's machine learning-driven content analysis provides a complete view of all customer content from across the enterprise. The platform features custom-built AI to rapidly process millions of documents in seconds to uncover hidden trends and opportunities for improved customer personalization and engagement. This leads to identifiable cost-savings and actionable recommendations like eliminating redundancies, content restructuring, document redesigns and consolidations.



Brian Cox, Vice president of IT at RRD, and Tiffani Miles, director of IT, explore RRD's new Business Communication Intelligence platform. | Credit: RRD

CONTENT FROM RICOH  
The Role of Digital  
Transformation in  
Expanding Services  
Beyond Print

[Learn more »](#)

### RD Business Communication Intelligence (BCI)

- **AI-powered platform** that helps companies improve customer communications
- **Analyzes millions of documents** in seconds to find trends, redundancies, and risks
- **Delivers cost savings** by consolidating mailings, reducing postage, and eliminating waste
- **Enhances customer experience** with clearer, consistent, and personalized messaging
- **Supports compliance** by flagging outdated branding and standardizing communications
- **Streamlines workflows** by centralizing templates and removing outdated versions
- **Offered by RRD to clients** in financial services, insurance, healthcare, and more

# WINNING AI GAME PLAN

- **Treat AI as an Initiative (at least) as Important as any Other in Your Organization**
- **Education, Education, Education**
- **Experiment, Experiment, Experiment**
- **Choose the Right Tools for *Your* Organization**
- **Implement, Observe, Adjust**

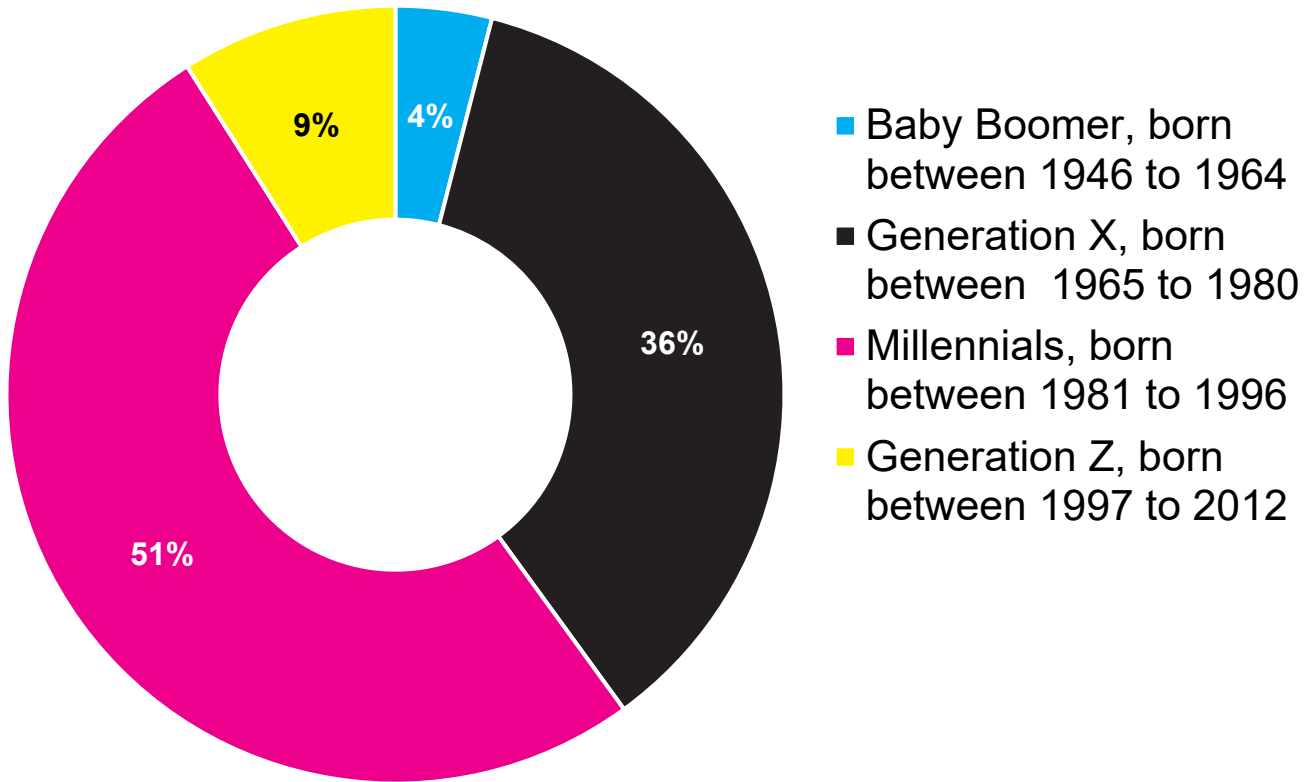
“AI isn’t science fiction. It’s a time-saver, an assistant, and a strategic enabler. Start with one task. Grow from there.”

# 5. CHANGING CUSTOMERS, NEW CHARACTERISTICS AND DEMANDS

# PRINT CUSTOMER CHARACTERISTICS

## GENERATIONS

Q. Which generation best describes you?



n= 177 Communication Buyers and Influencers  
NAPCO Research 2025

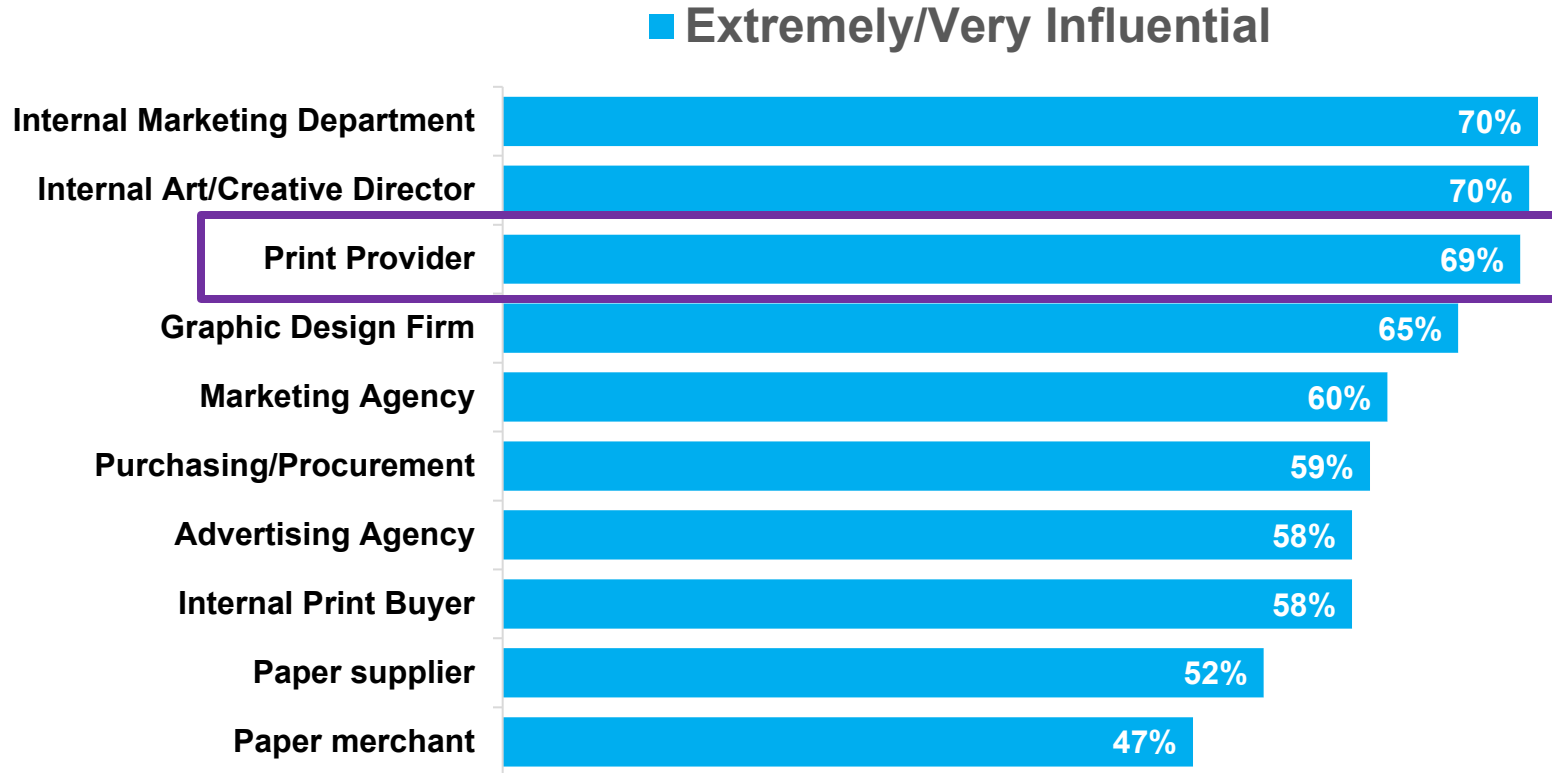
## PRINT EXPERIENCE

- 61% report extremely familiar with processes used to product their company's printing
- **Average time purchasing print : 7.8 years**
- **Printing Processes Used**
  - Digital Inkjet 71%
  - Digital Toner 64%
  - Digital Printing not sure of type 43%
  - Offset 31%



# MOST IMPORTANT PRINT PROCESS INFLUENCERS

Q. How influential are the following parties in advising you on how your print materials are produced (i.e., print specifications, size, finishing, special effects)?

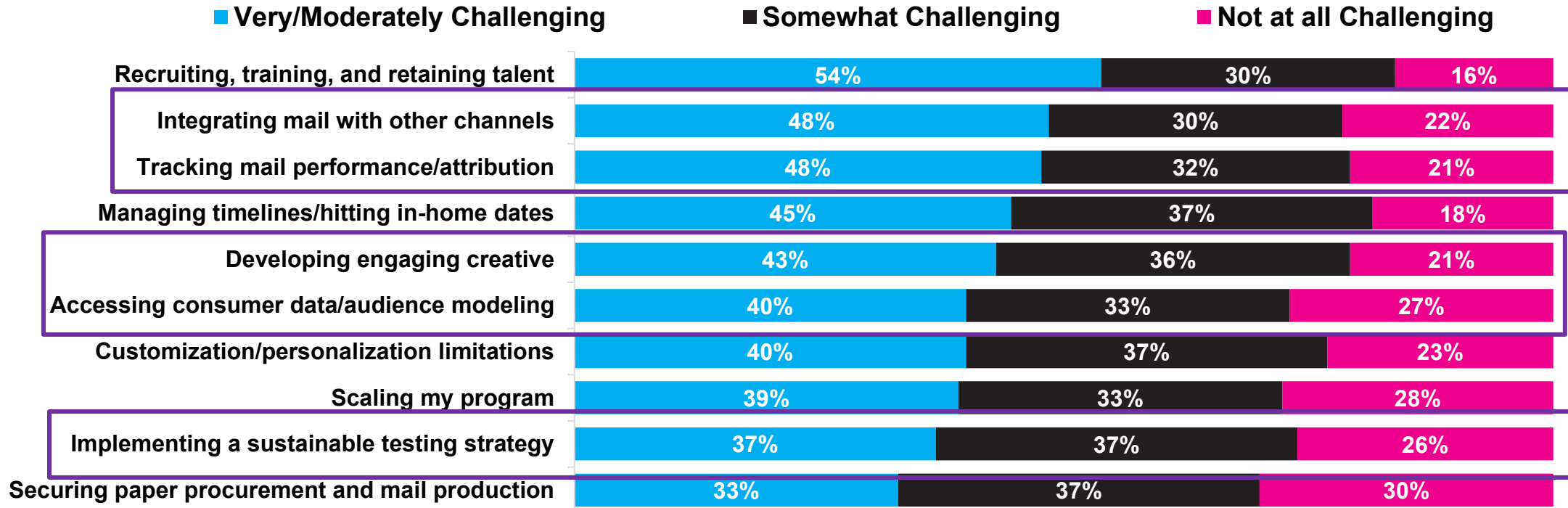


n=166 Communication Buyers and Influencers

Source: Next Generation Inkjet Investment, NAPCO Research 2025

# CHALLENGES IN MANAGING CUSTOMER COMMUNICATIONS

Q. How challenging are the following areas when managing your customer communication programs (e.g. direct mail, bills/statements)?



AI is/will have an impact

n=130 Communication Buyers and Influencers respondents that influence or purchase direct mail or bills/statements  
Source: The Production Inkjet Application Revolution, NAPCO Research 2024

# PRINT BUYERS VALUE TECHNOLOGY, REPUTATION, & SERVICE

**Q. How important are the following CRITERIA to your organization when selecting an external service provider for printing?  
Ranked Extremely or Very Important.**

1. Technical capabilities **80%**
2. Reputation **80%**
3. Print samples that demonstrate a provider's capabilities **78%**
4. Printing capabilities include digital presses **77%**
5. Offers online ordering tools to manage ordering & branding **76%**
6. Offers dynamic personalization of printed materials **76%**
7. Offers high level of versioning **75%**
8. Offers us services beyond print **66%**
9. Provider has production inkjet presses **66%**
10. Uses green/environmentally sustainable production processes **64%**
11. Specialize in our industry **59%**
12. Provider is on an approved vendor list **59%**
13. Referral from someone that has worked with them **55%**

n=166 Communication Buyers and Influencers

Source: NAPCO Research 2025

## 6. PRINTING UNITED EXPO: THE STAGE FOR INNOVATION

# PRINTING UNITED EXPO

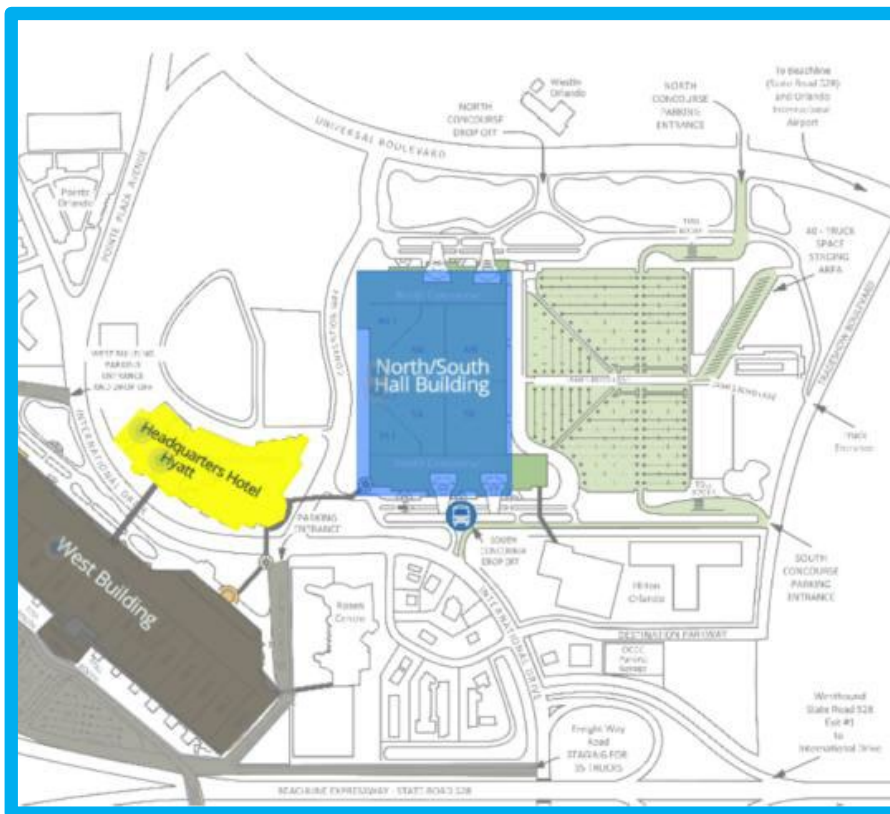
Over 820 Exhibitors in both the North & South Halls

## Show Hours

October 22 – 9:00 AM – 5:00 PM

October 23 – 9:00 AM – 5:00 PM

October 24 – 9:00 AM – 3:00 PM





# NEW: AI PAVILLION



# AI PAVILION SESSIONS AND SPONSORS

## Wednesday, October 22

- 10:00 am: AI in Print, Practical Ways to Work Smarter Not Harder
- 11:00 am: AI Pavilion Sponsor Panel
- 1:00 pm: Making Sense of AI Tools for a Sales Organization
- 2:00 pm: From Curiosity to Competitiveness — The State of AI in Printing
- 3:00 pm: AI Innovation Tour at PRINTING United Expo
- 4:00 pm: AI Pavilion Happy Hour

## Thursday, October 23

- 10:00 am: A Quick Guide to Today's Best AI Strategies for Print
- 11:00 am: AI Pavilion Sponsor Panel
- 1:00 pm: From Design to Print with Adobe: What You Need to Know About PDF and AI for End-to-End Print and Embellishment Workflows
- 2:00 pm: AI My Way (TBD)
- 3:00 pm: AI Innovation Tour at PRINTING United Expo
- 4:00 pm: AI Pavilion Happy Hour

## Friday, October 24

- 10:00 am: Lessons from AI Leaders — Practical Tips and Tactics Adoption Success
- 11:00 am: Stop Chasing Better, Start Owning Different with AI
- 1:00 pm: AI Innovation Tour at PRINTING United Expo

## AI Pod Sponsors:

- Ad Legends
- DirectMail 2.0
- GoMake Inc.
- Koenig & Bauer
- PRINTING AI Consulting
- Significans Automation

# VENUE FOR KEY ANNOUNCEMENTS

## DIGITAL PRINTING - PRODUCTION INKJET

RICOH Pro VC80000 (Booth 5621)

FUJIFILM J Press 1160CFG (Booth 3021)

KONICA MINOLTA AccurioJet 30000 Konica Minolta's (Booth 5200)

RISO (Booth 3915) Valezus series, in partnership with Plockmatic (Booth 2836)

ATEXCO VegaPress (Booth 662)

## DIGITAL PRINTING - TONER

KONICA MINOLTA AccurioPress C14010S and AccurioPress 7100E

RICOH Pro C5400S, Pro C9500, and Pro C7500 RICOH (Booth 5621)

## MAILING AND FULFILLMENT

BELL AND HOWELL Inserting System (Booth 5051)

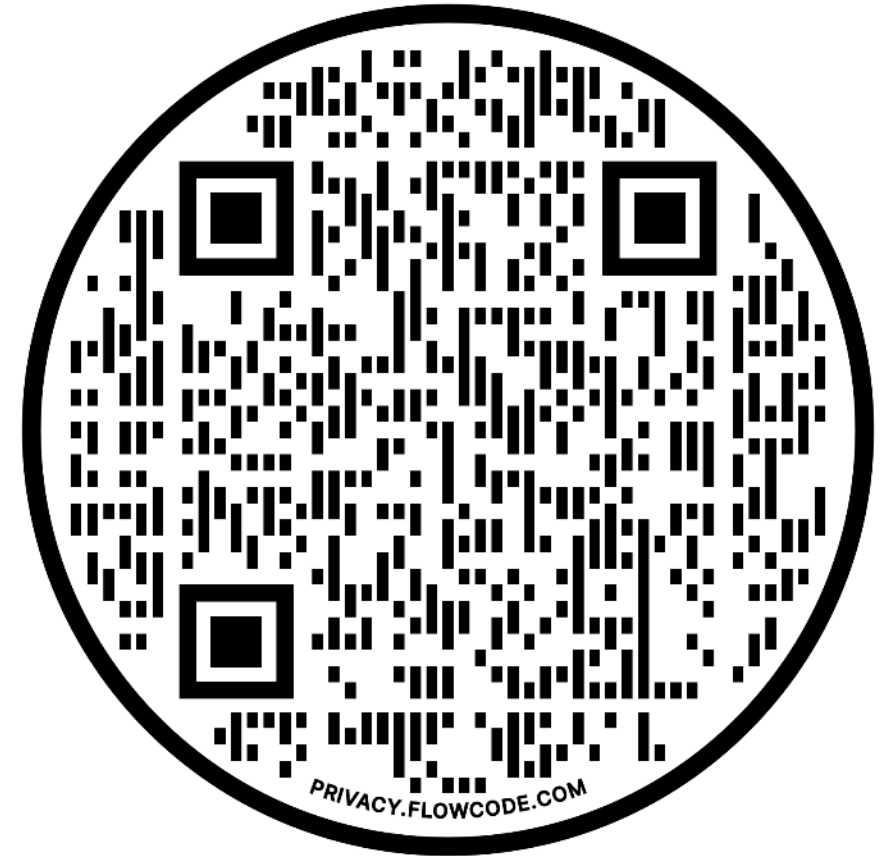
PRINTWARE iJetcolor 1175C (Booth 5027)

BOWE Fusion Speed 30K Inserter (Booth 4276)

CAPITAL MAILING EQUIPMENT IM2 AND IM4 Addressing Systems (Booth 5093)

# DOWNLOAD THE SHOW MOBILE APP

- Please download the app if you haven't already, or simply update if you have it from last year
- Create a show planner in the app or login if you have already created one
- New this year – messaging in planner with exhibitors and attendees
- At the Expo – encourage other attendees to download the app to find exhibitors based on interests, easily navigate to them in the 1 million sq.ft. hall, and browse the schedule for education and events on and off the show floor.



# FINAL THOUGHTS



# RECOMMENDATIONS

- Embrace automation and AI as **strategic enablers**, not experiments.
- Explore adjacent markets through **service and product convergence**.
- Leverage inkjet and digital platforms to **unlock new applications and revenue streams**.
- Put the **customer experience** at the center of innovation.



## CLOSING STATEMENT

Print is not just surviving — it's reinventing. The winners will be those who combine innovation, automation, and customer focus to shape the future.



# Thank You!

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