

# 2026

## EUROPEAN PRINTING INDUSTRY KEY DATA

2026 Intergraf Economic Report – Abstract

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# Profile of the European printing industry



**110.000**  
COMPANIES

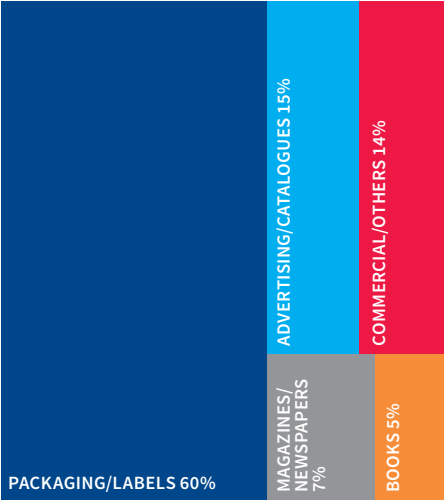


**630.000**  
EMPLOYEES



**85 billion**  
TURNOVER

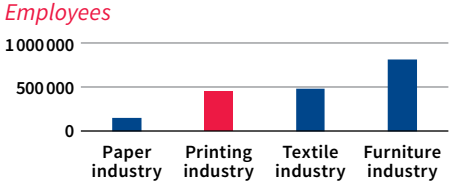
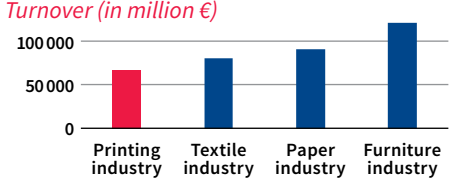
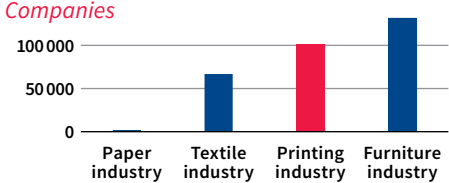
Share of turnover per product (EU27, 2024)



Size of the EU printing industry (EU27, 2023)



Profile comparison of selected manufacturing sectors (EU27, 2023)

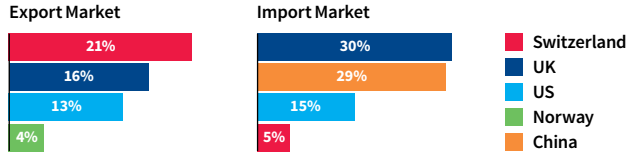


Source: Eurostat 2026, processed by Intergraf, data for EU27+UK+NO+CH+IS except when specified differently.

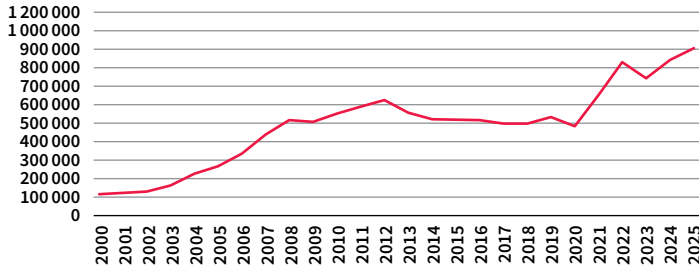
Positive trade balance:  
**€1.2 billion**

**70%**  
of EU trade  
is intra-EU

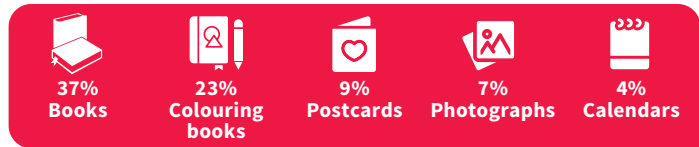
*Main trade partners of the European printing industry (EU27, 2025)*



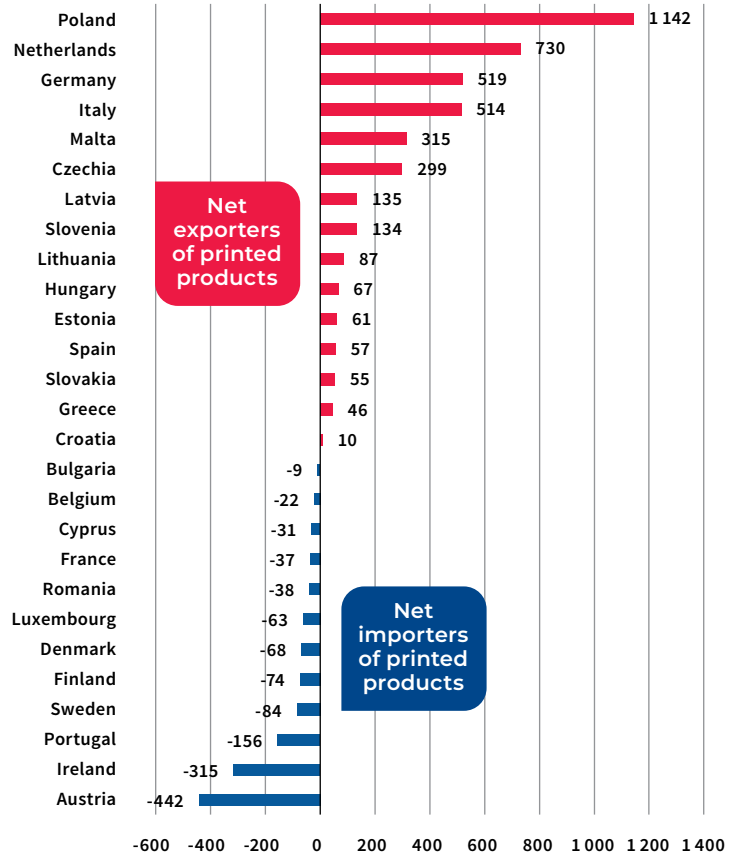
*Import of printed products from China (EU27, 2000-2025, in €)*



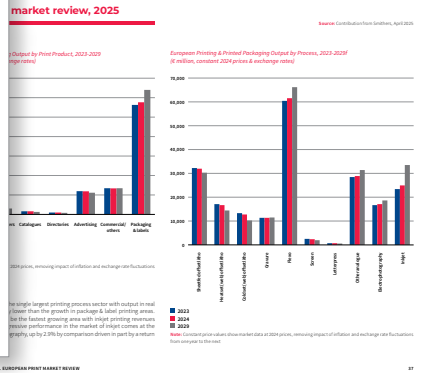
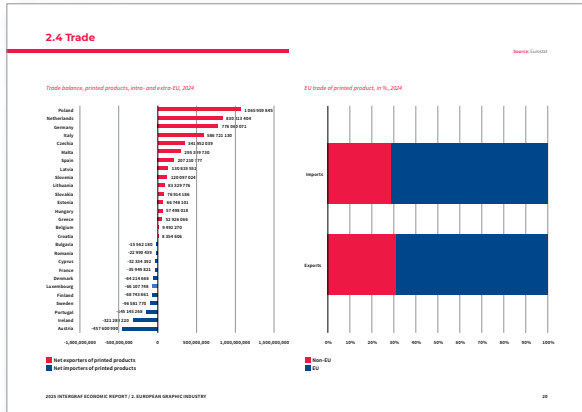
*Main printed products imported from China to the EU (EU27, 2025)*



*Printed products trade balance (intra- and extra-EU27, in million €, 2025)*



# More economic information in the 2026 Intergraf Economic Report



### Long-term economic development

**Rising labour costs**

Rising labour costs were mentioned by 77 % of companies. Though trend is not a new development in Germany, it has intensified in recent years. The increase in wage and non-wage labour costs derived from the development of productivity in the industry represents an additional cost burden for companies. This has the capacity to exert either a downward pressure on the value chain, thereby raising prices and, consequently, bearing demand, or to exert a negative impact on the profit margin. Depending on the nature of the product portfolio of the individual company, this might further create the incentive for a relocation to countries with comparatively lower labour costs or, where feasible, the substitution of labour with technology if this is based on continuous. This is particularly relevant in the context of the ongoing discussion surrounding a potentially substantial increase in the minimum wage, a topic that has recently gained renewed momentum following the formation of the new government in Germany.

**Costs of bureaucracy and regulation**

While regulation is essential to ensure transparency, safety, environmental protection, and fair competition, it may be unduly burdensome to avoid unintended consequences for SMEs. In recent years, policymakers have underestimated the impact of increased regulation, resulting in mounting pressure on small- and medium-sized printing companies. Germany in particular has not yet taken sufficient action to ease this burden by implementing necessary reforms.

**Strong order-fulfilment fluctuations**

Seasonal capacity utilisation is higher during peak periods such as Christmas or spring and lower in summer and at the beginning of the year. However, the general decline in demand is also affecting non-seasonal orders, which is resulting in an increasing discrepancy between phases of high and low capacity utilisation. This has the effect of increasing the costs of unused capacity during periods of low demand.

**Lack of predictability**

The economic environment in Germany has been subject to considerable turbulence in recent years, precipitated by a succession of unforeseen crises and an absence of political cohesion and reform initiatives. In addition to the macroeconomic uncertainties, these developments have exerted a detrimental influence on the predictability of corporate planning and investing. Germany's political stability, which has been identified as a crucial factor in investment decisions in recent years in international location studies, has recently experienced considerable deterioration.

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**Economic information available in the Report:**  
 Profile of the printing industry, labour costs, production value, trade figures, print-related market data, selected country report.

European print market review and forecasts until 2030 from research company Smithers included in the report.

