

Associations End of Year Survey 2025

FESPA

Participation

There was a total of 33 respondents to the survey

With the exclusion of

- **China**
- **Philippines**
- **Nepal**
- **Ukraine**
- **Poland**

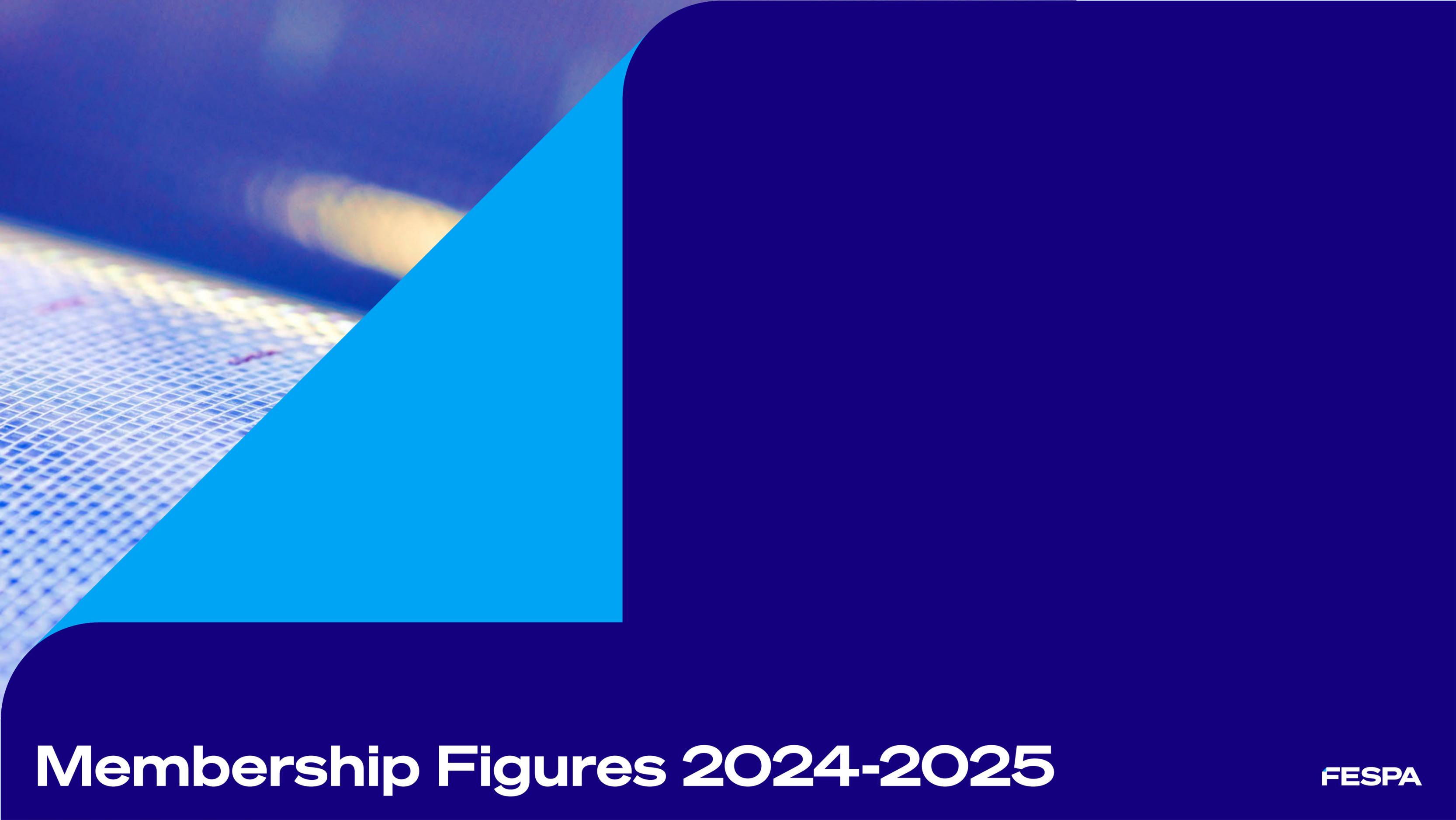


***Please note that FESPA Belgium and Febelgra have been counted as two separate Associations**

How many staff do you have working at your Association

Association	Full-time employees	Part-time employees	Volunteers	Total
Australia		1		1
Austria	1	4		5
FESPA Belgium		1		1
Febelgra	6	1		7
Bulgaria		1	4	5
Croatia			2	2
Czech Republic			9	9
Denmark	16	4		20
Finland		1		1
France	2	1	20 (Board)	23
Germany	6	8		14
Greece			6	6
Hungary		1	1	2
India	1		3	4
Italy	1	4		5
Japan	1			1
Korea	2			2

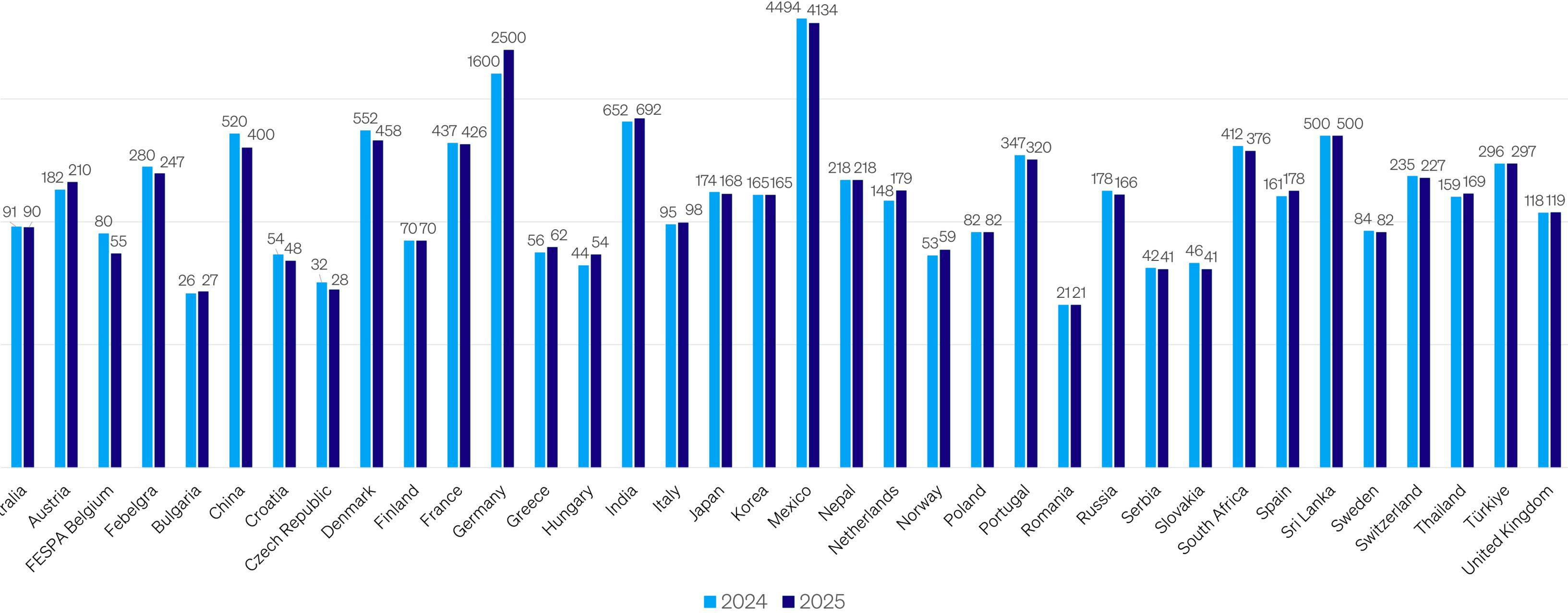
Association	Full-time employees	Part-time employees	Volunteers	Total
Mexico	6			6
Netherlands		4	6	10
Norway		3	5	8
Poland				
Portugal	5	1		6
Romania			2	2
Russia	3	1		4
Serbia	2	3	1	6
Slovakia		1	7	8
South Africa	17			17
Spain		3		3
Sri Lanka	5		15	20
Sweden		1	7	8
Switzerland	1			1
Thailand		1	18 (Board)	19
Türkiye	1		2	3
United Kingdom	1	4		5



Membership Figures 2024-2025

FESPA

2024-2025 Membership Comparison



* Please note last year membership numbers were used for Nepal & Poland

2024-2025 Membership Comparison

* Please note last year membership numbers were used for Nepal & Poland

Association	% Difference from 2024 to 2025	Total members 2025	Total members 2024
Australia	1%	90	91
Austria	15%	210	182
FESPA Belgium	31%	55	80
Febelgra	12%	247	280
Bulgaria	4%	27	26
China	23%	400	520
Croatia	11%	48	54
Czech Republic	13%	28	32
Denmark	17%	458	552
Finland	0	70	70
France	3%	426	437
Germany	56%	2500	1600
Greece	11%	62	56
Hungary	23%	54	44
India	6%	692	652
Italy	3%	98	95
Japan	3%	168	174
Korea	0	165	165
Mexico	8%	4134	4494

Association	Difference from 2024 to 2025	Total members 2025	Total members 2024
Nepal	0	218	218
Netherlands	21%	179	148
Norway	11%	59	53
Poland	0	82	82
Portugal	8%	320	347
Romania	0	21	21
Russia	0	166	178
Serbia	2%	41	42
Slovakia	11%	41	46
South Africa	9%	376	412
Spain	11%	178	161
Sri Lanka	0	500	500
Sweden	2%	82	84
Switzerland	3%	227	235
Thailand	6%	169	159
Türkiye	1%	297	296
United Kingdom	1%	119	118

Membership Summary

12,704

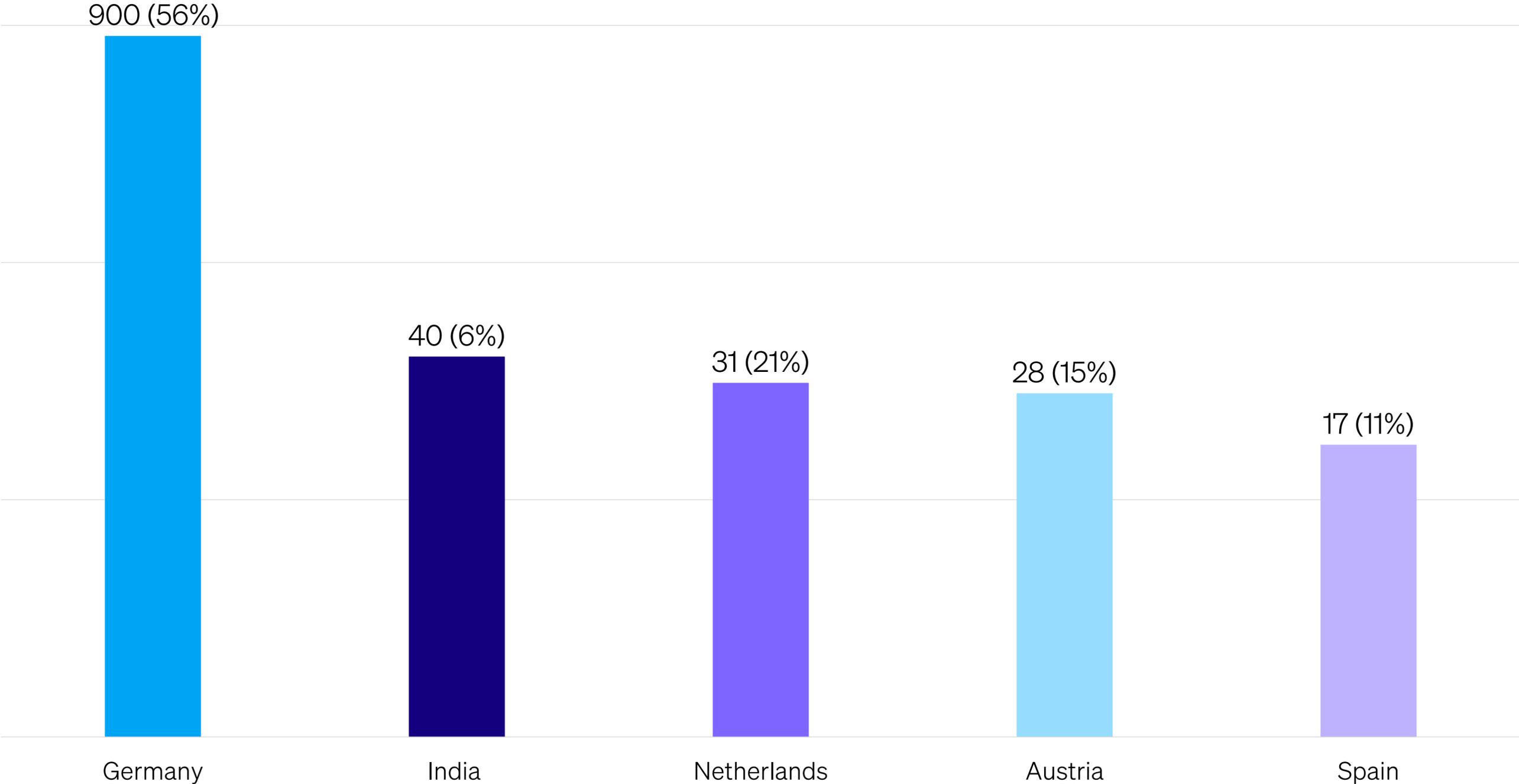
2024 Members

13,007

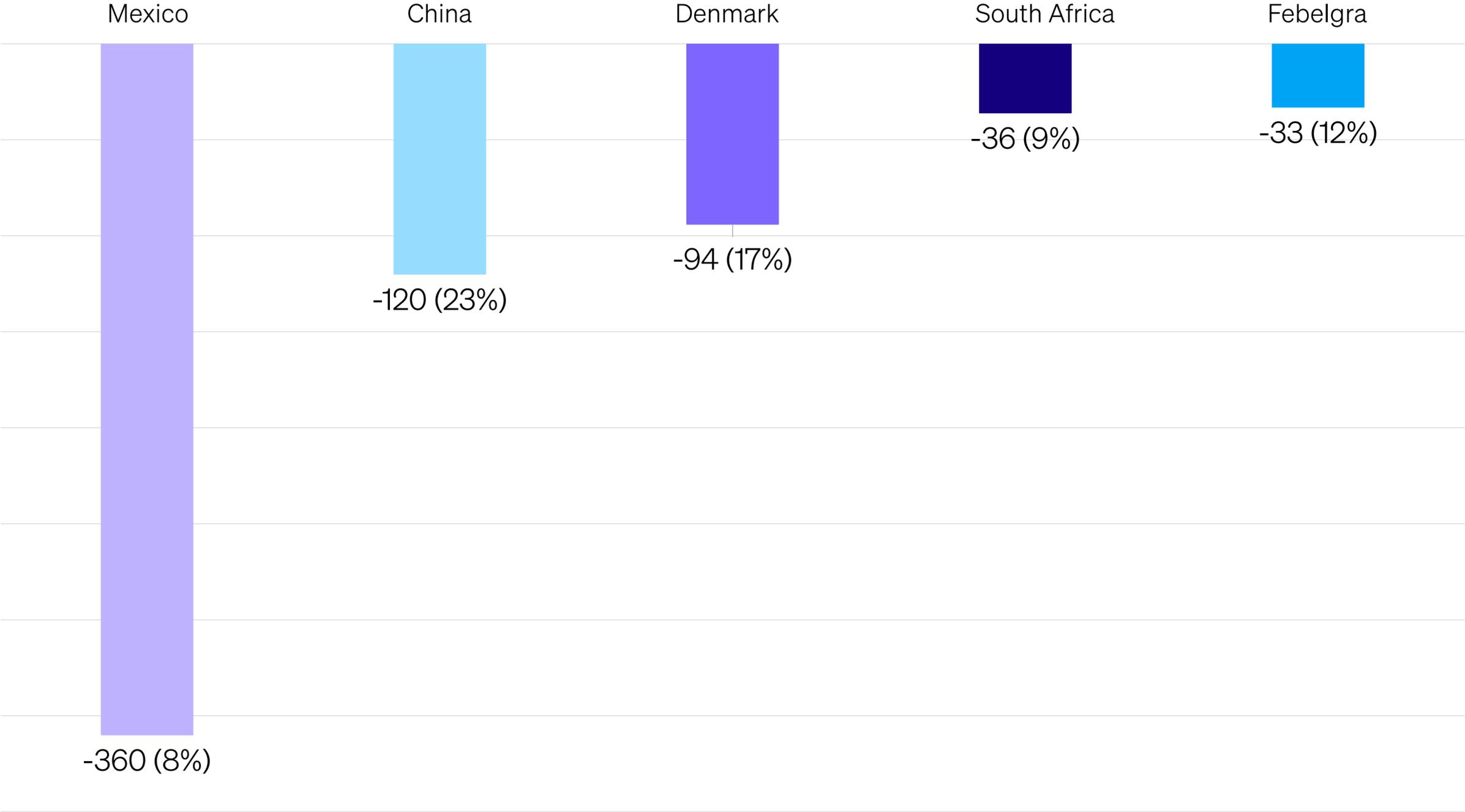
2025 Members

**Overall, there has been a 2.4%
increase in membership numbers
from 2024 to 2025**

Top 5 increase in membership 2024 - 2025

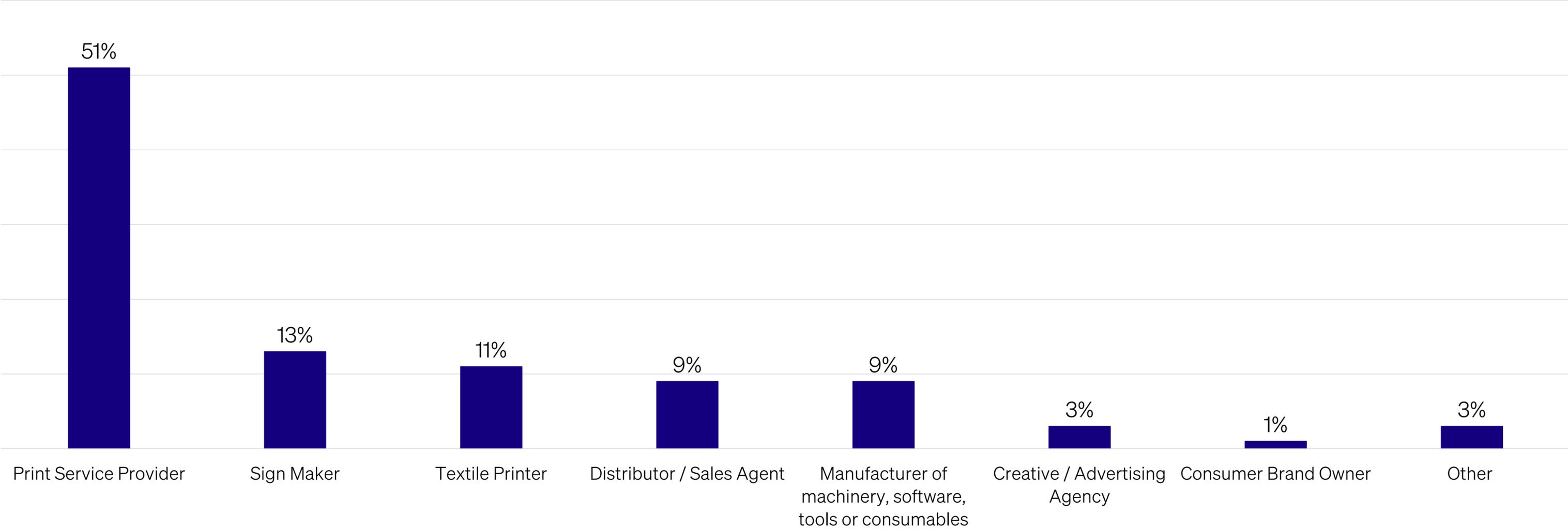


Top 5 decrease in membership 2024 - 2025



Association membership breakdown

Please tell us the breakdown of your membership across the following categories as a percentage

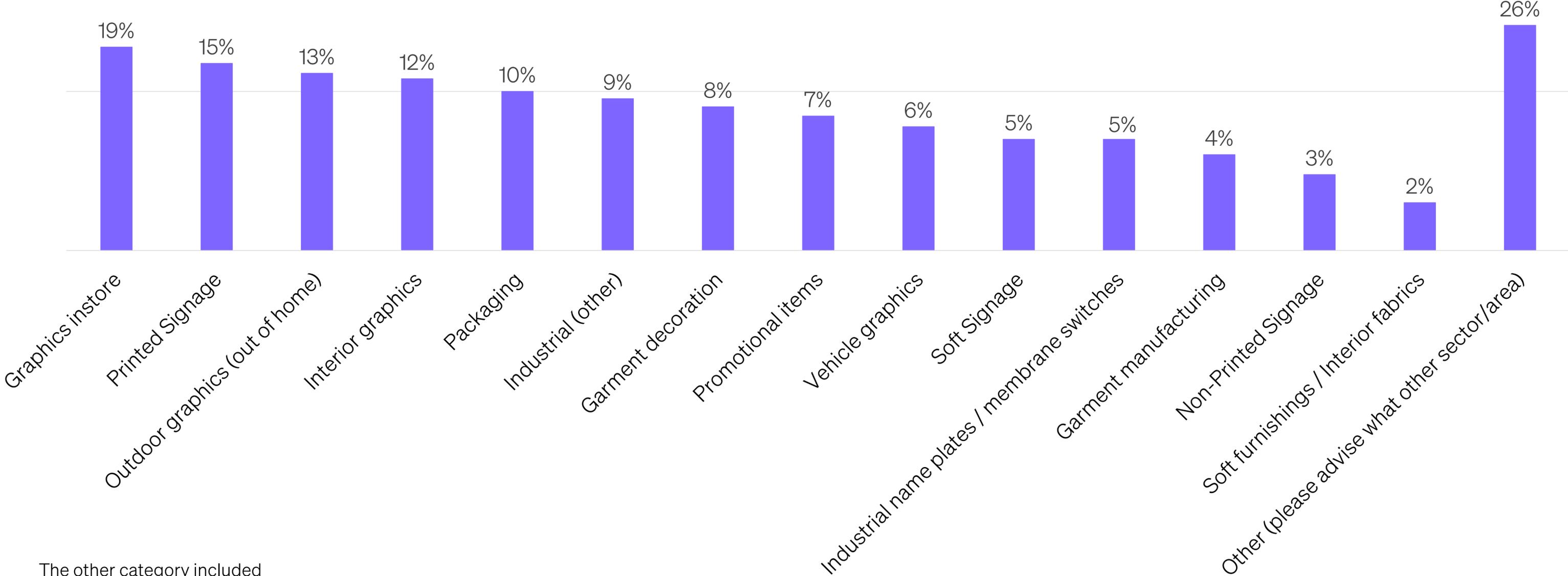


The other category included

- Stationary
- Ceramics
- Electronics
- Gifts
- Screenprinting
- Digital media
- Engraving
- Installation services
- Training centres
- Specialist teachers
- Journalist & Consultants
- Schools
- Magazines
- Promotional items

75% of membership are producers

What do your members produce?



The other category included

- Trade printers
- Commercial printers
- Event branding
- Offset printing
- Digital printing
- Flexo
- Retail
- Supplier centres
- Training centres
- Services: Installation
- Creative agencies
- Sheetfed digital printers

Association Events

FESPA

How many events have you held in the last year?



Total number of events for 2025 = 471
Total number of events for 2024 = 355
There has been a 33% increase

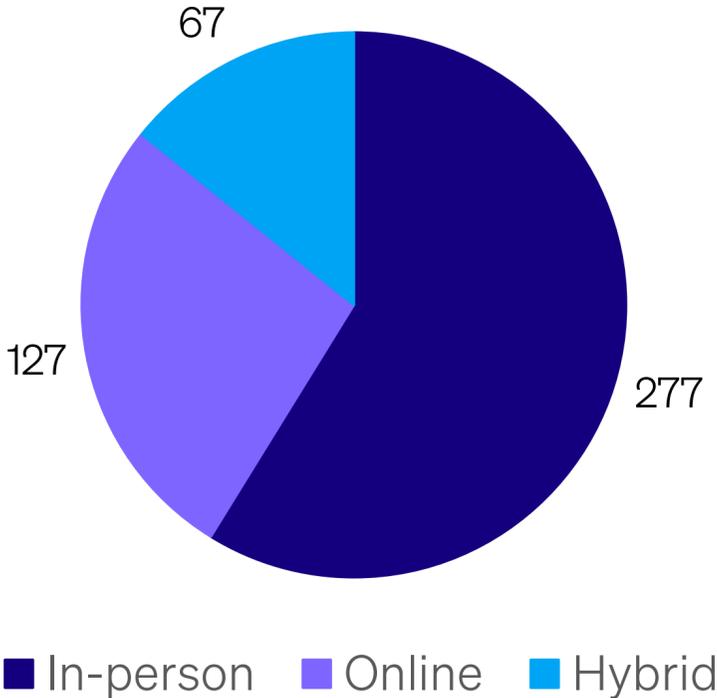


There has been an increase of 12% for physical events from 2024 to 2025

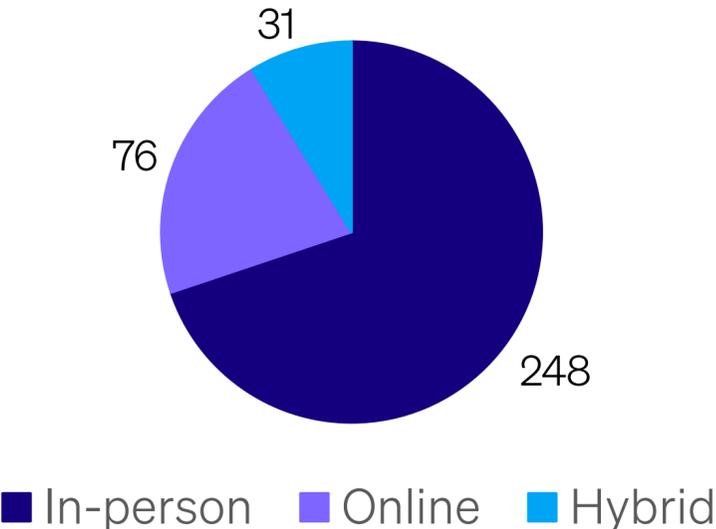


Virtual events have increased by 67% since 2024 this is due to the increase in Associations hosting webinars

2025



2024



*There were 33 responses to this question

What trends have you observed in your country/region in the sectors you represent over the past 12 months?

“Difficult business environment, interest in AI and automation, difficulty with finding and employing staff, many mergers.”

FESPA Australia Association

“People are more interested in AI and environmental protection.”

Verband Werbetchnik+Print

1. Mature Industry movements (M&A - Margin Pressure (Higher Wages, Energy, Logistic and Material Costs) Impact large PAAS companies on production - Growth of Micro-companies)
2. Impact of more demanding Legislation and Regulation (CO2- Certification - LCA - EPR)

FESPA Nederland Association

“The market is slightly declining, lack of qualified labour.”

ARSIT&D

“Strong shift to digital printing due to the flexibility and short run solutions. High growth in packaging sector. Printers are more aware and open to the use of AI. Fierce competition with many foreign players entering the market e.g. Chinese printers.”

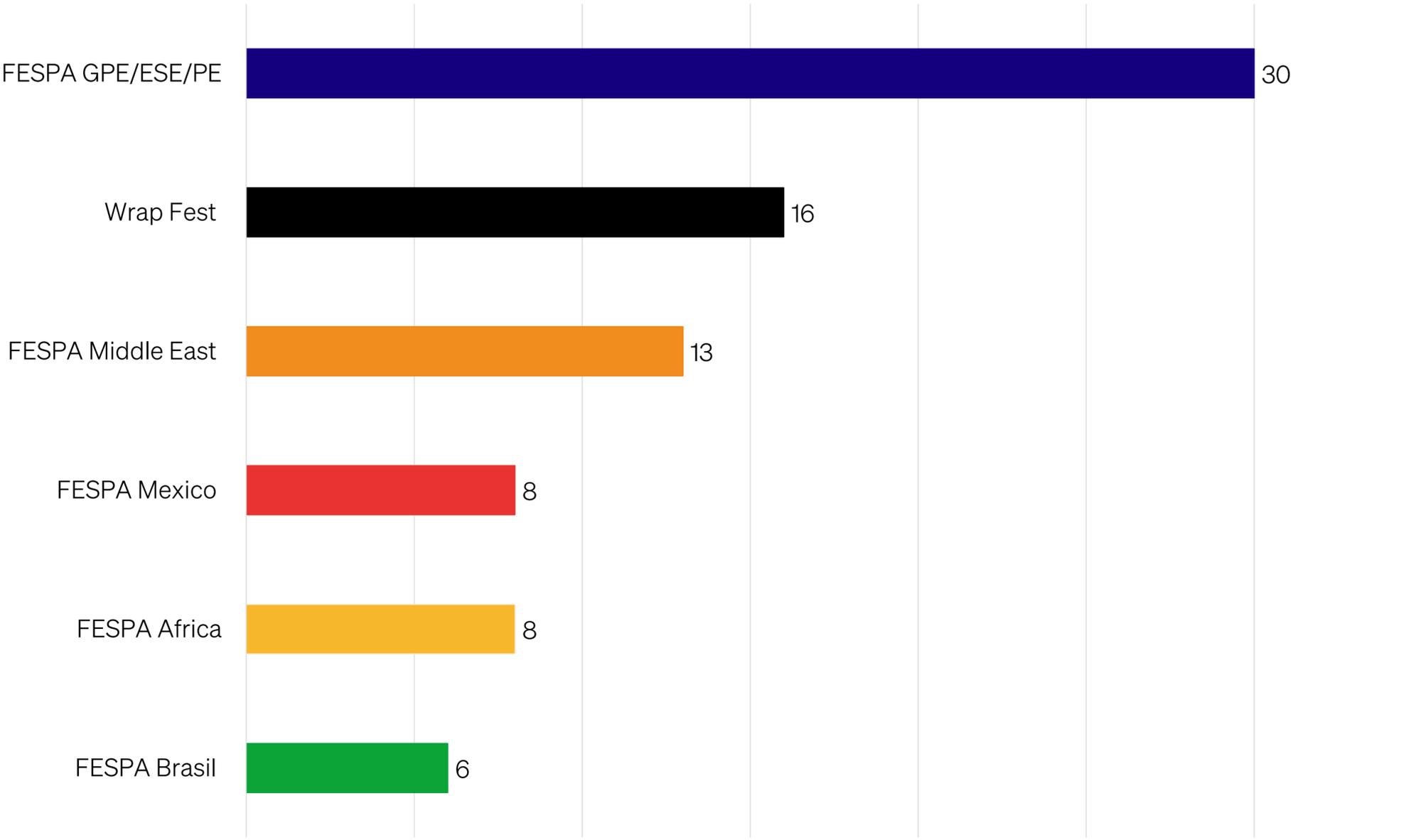
TINPA

AI is a big challenge for many companies but also an opportunity. New legislation means higher demand for sustainable packaging.

FESPA Denmark Association

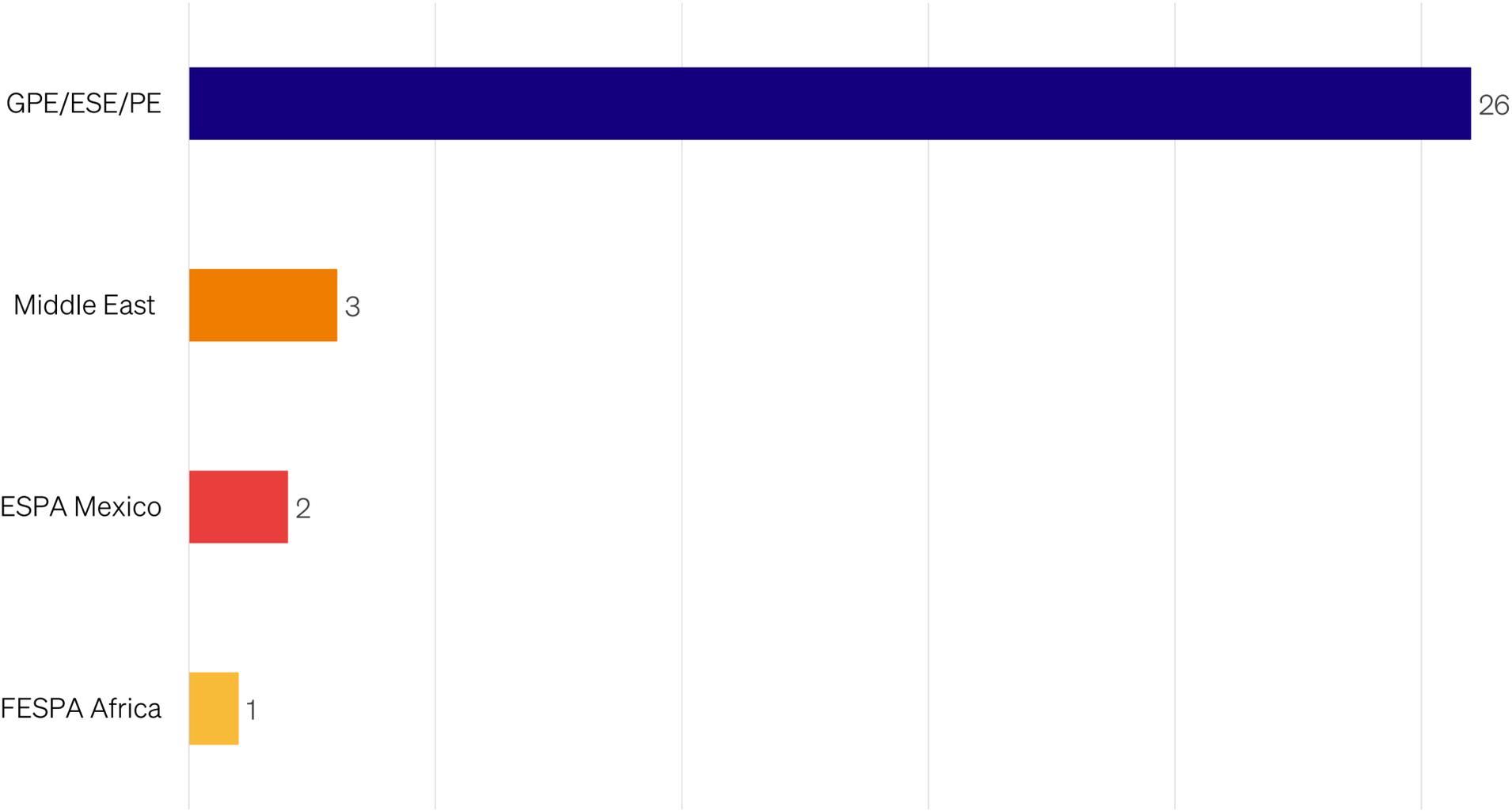
Please refer to the word document for the full list of responses

Please tick all the FESPA exhibitions that have been promoted by your Association in 2025



*There were 33 responses to this question

If you are planning to bring a group to any shows in 2026, please tick to indicate the relevant ones

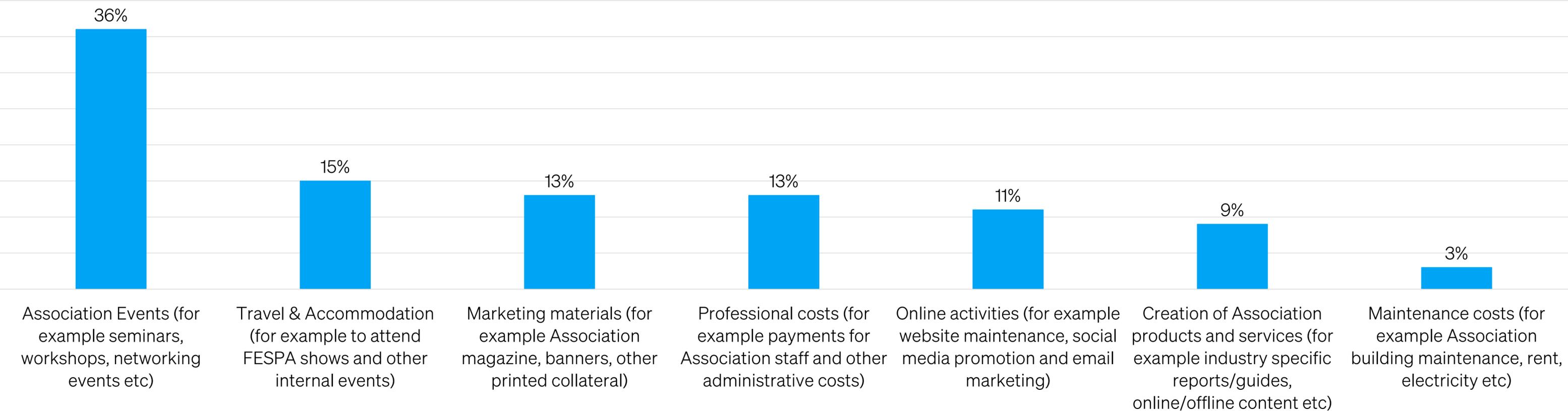


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Association Feedback

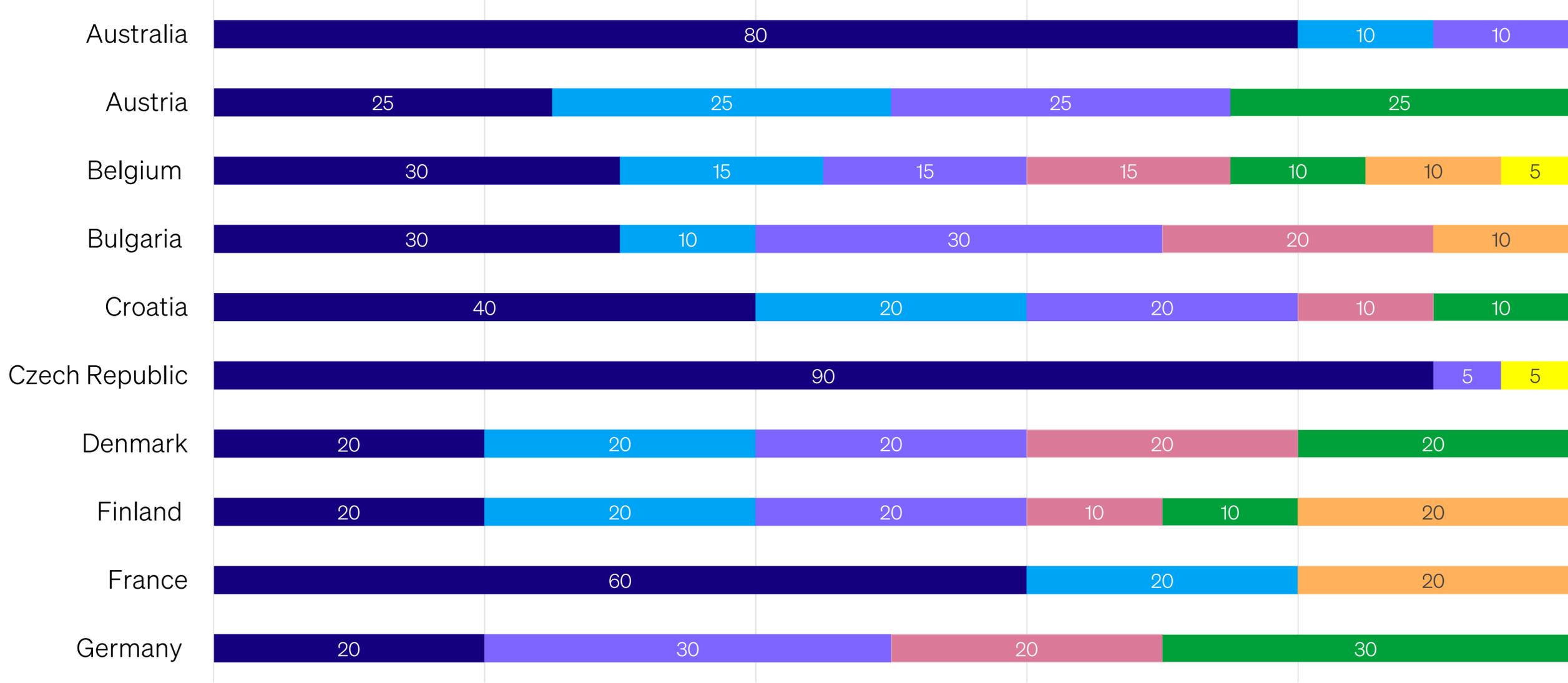
How does the Marketing Services fee benefit your Association?



*The percentages provided show the averages per all Associations

How does the Marketing Services fee benefit your Association?

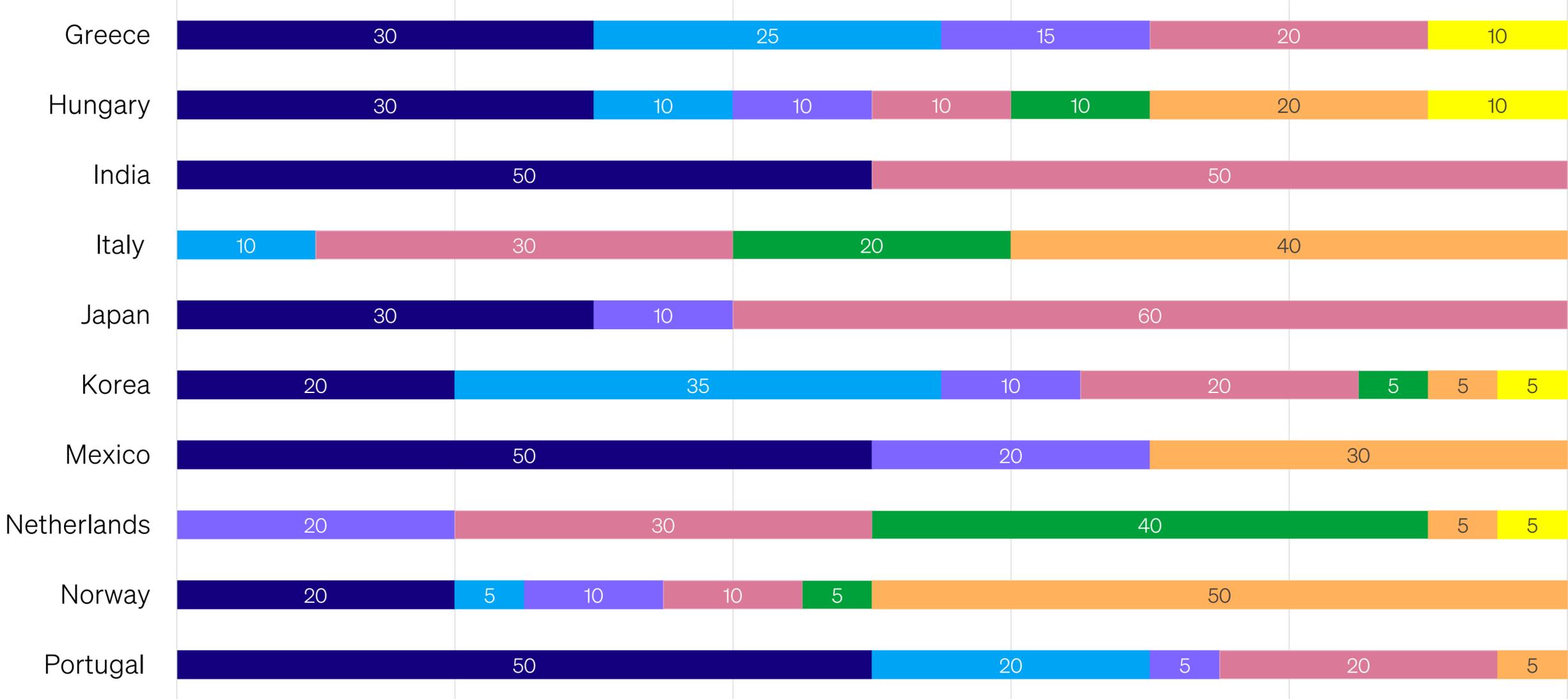
Respondents were asked to provide a percentage breakdown for each section



- Association Events
- Marketing materials
- Online Activities
- Travel & Accommodation
- Creation of Association products & services
- Professional costs
- Maintenance costs

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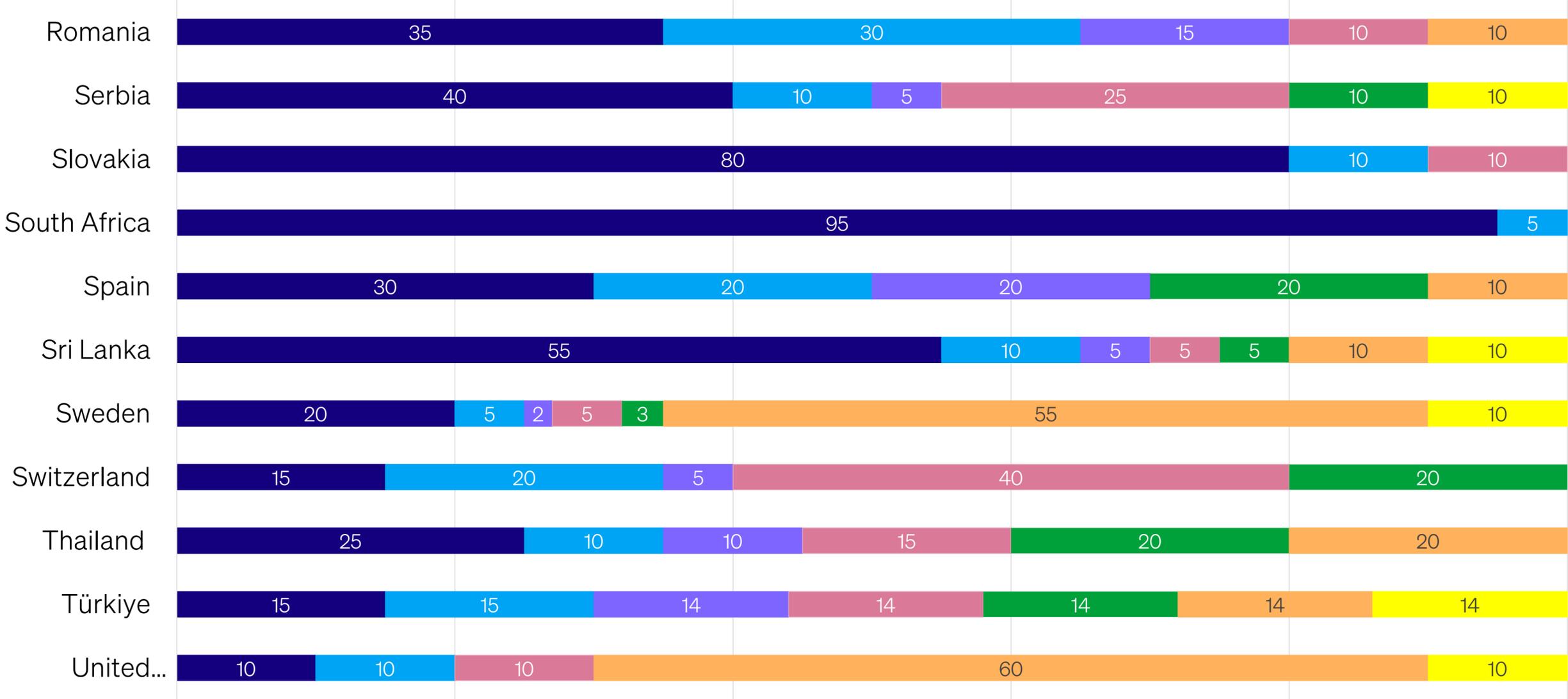
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Thank you for all your continued support