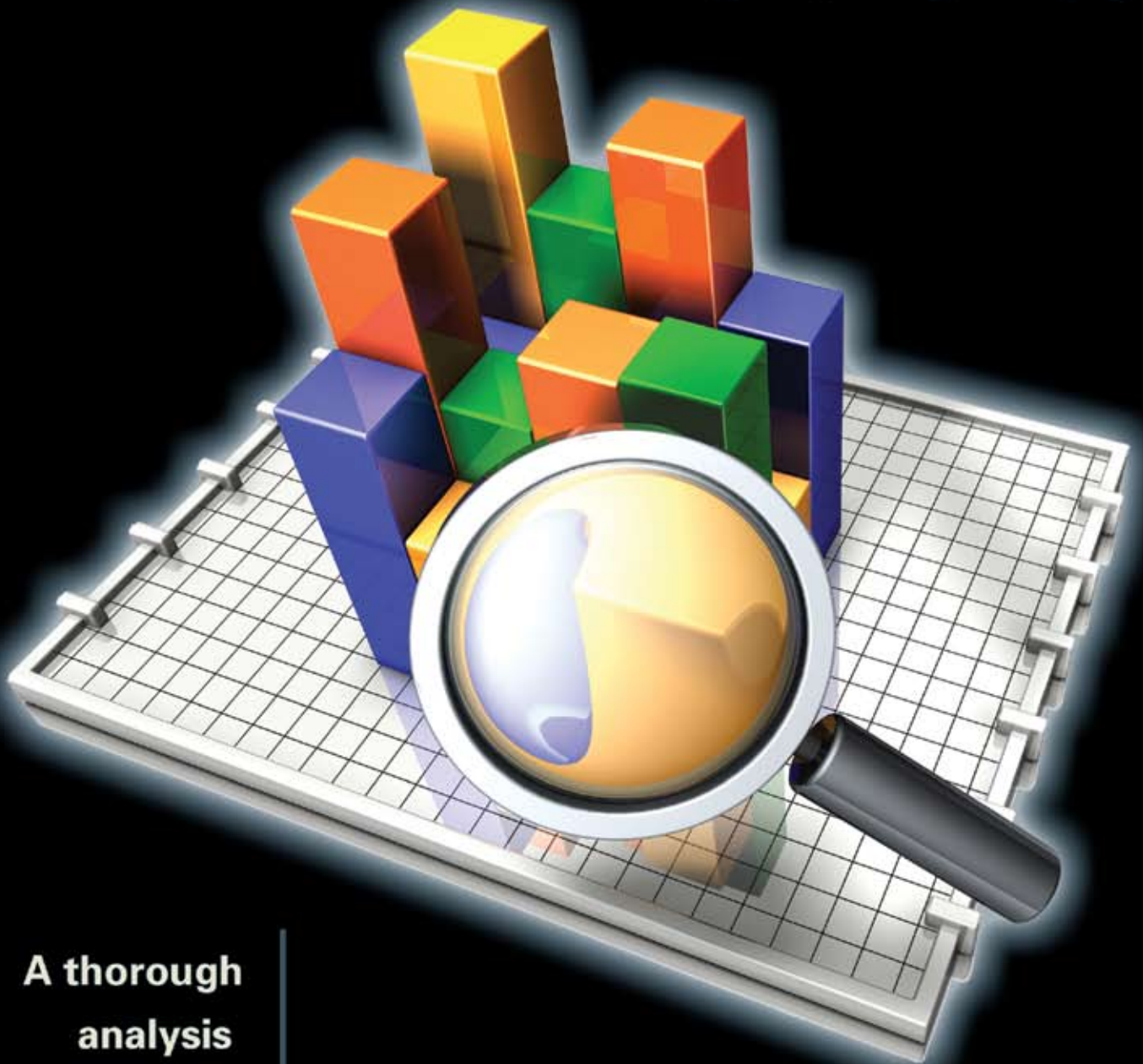


# In-Plant Market Statistics

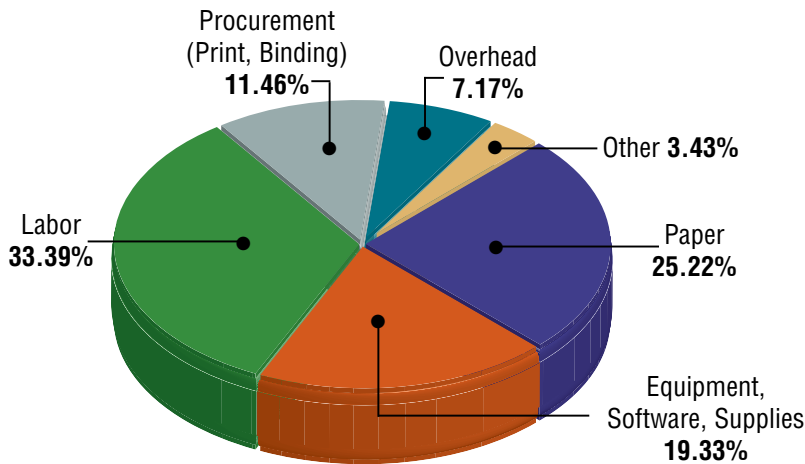


A thorough  
analysis  
of today's  
in-plant  
industry

***IN-PLANT***  
**GRAPHICS**

# In-plant Market At A Glance

## Annual Budget Breakdown



## Budget

Average: \$2,882,040

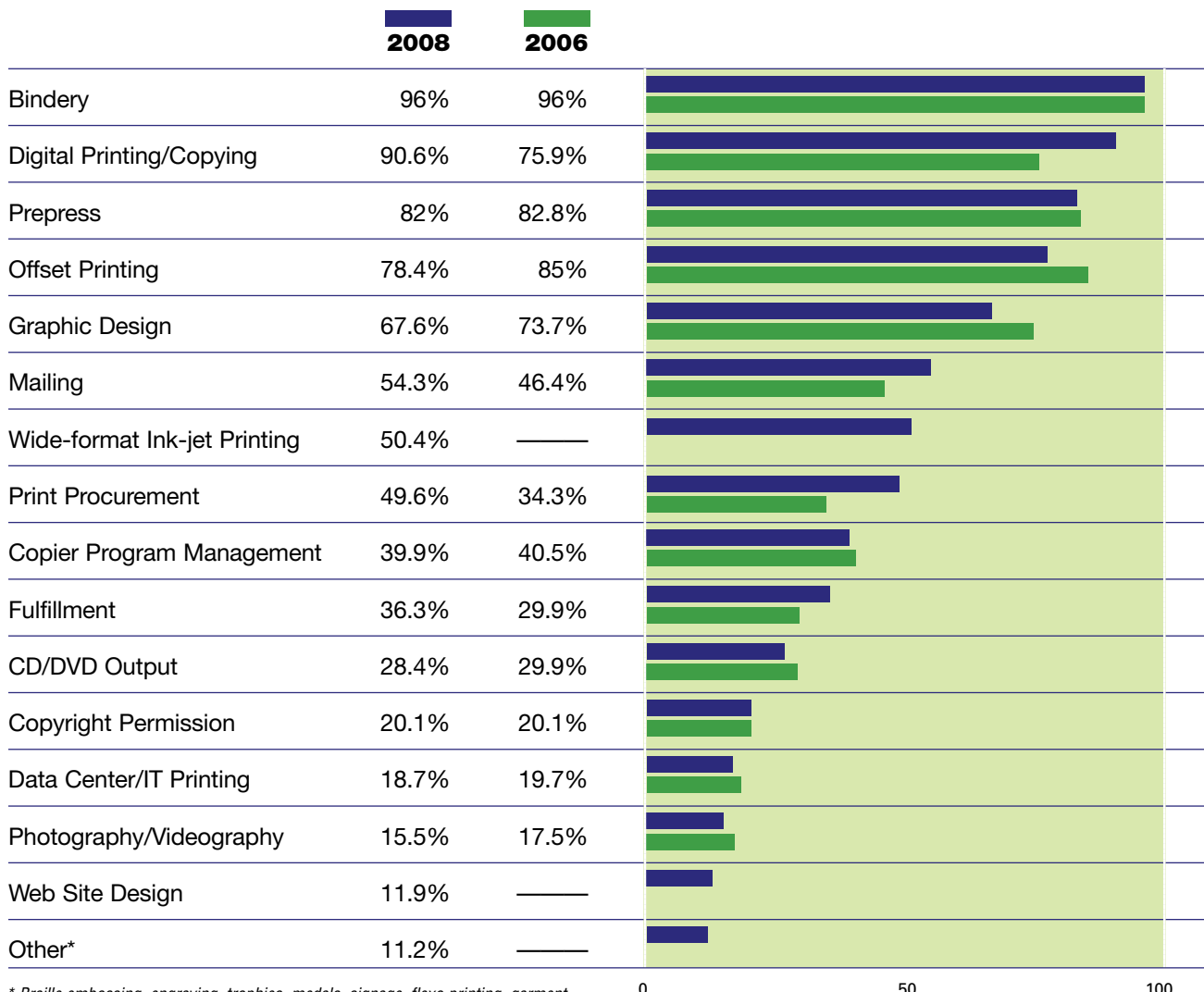
Two Years Ago: \$2,493,111

## Employees

Average: 18.2

Two years ago: 18.1

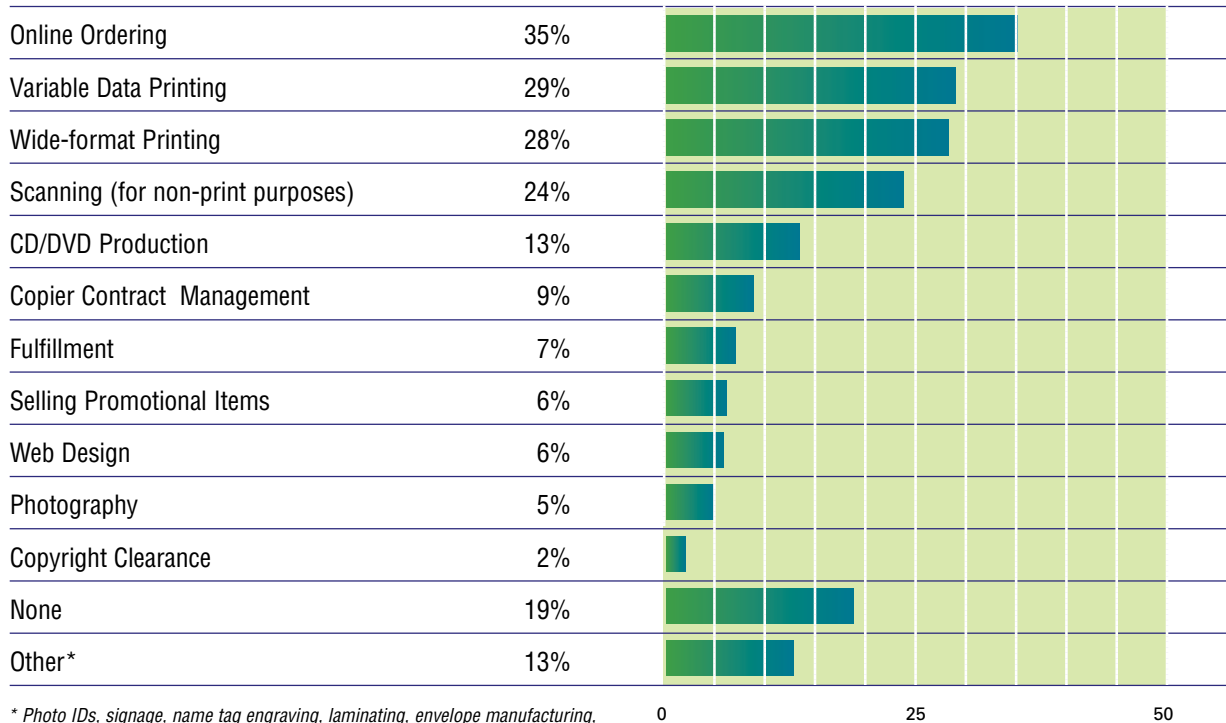
## Services In-plants Provide



\* Braille embossing, engraving, trophies, medals, signage, flexo printing, garment printing, dye sublimation, interoffice mail delivery, records management, engineering copies, sheeting, photo library, Web site maintenance, trade show support, e-marketing

## New Services

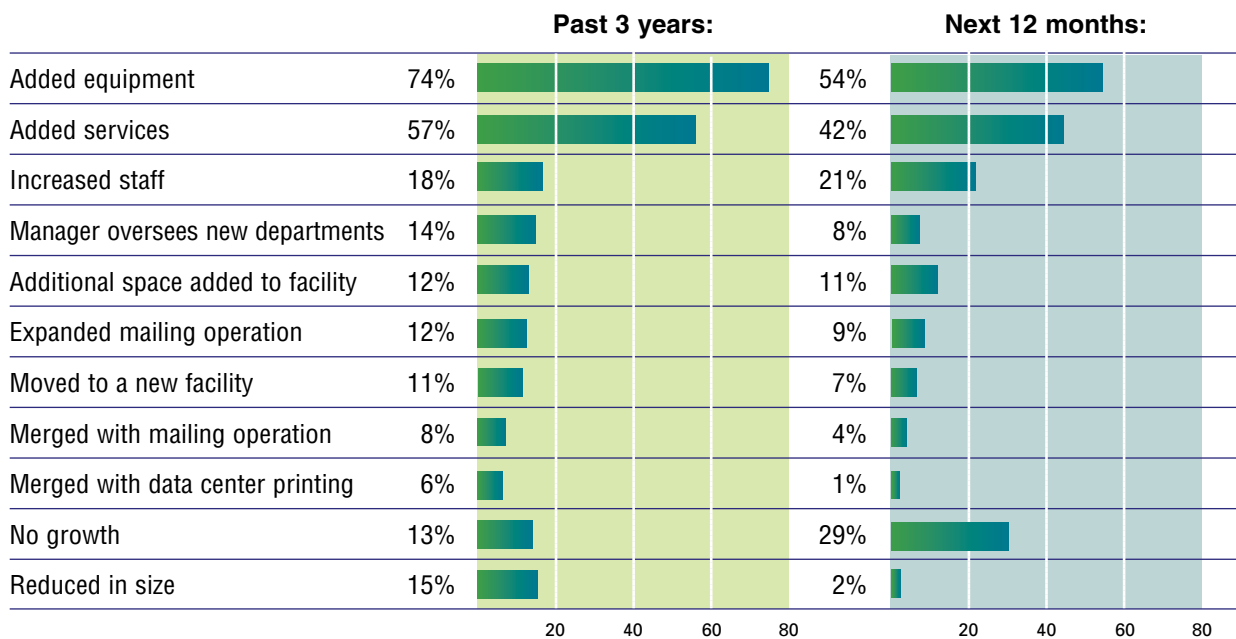
In-plants continually add services to better serve their parent organizations. Here are the top additions over the past three years:



\* Photo IDs, signage, name tag engraving, laminating, envelope manufacturing, Web-based procurement tool for outsourced print, e-marketing/e-merchandising, data center/IT printing, bulk mailing, corporate brand identity management, document integrity tracking system

## Past & Future Growth

In-plants continue to expand in a variety of ways.



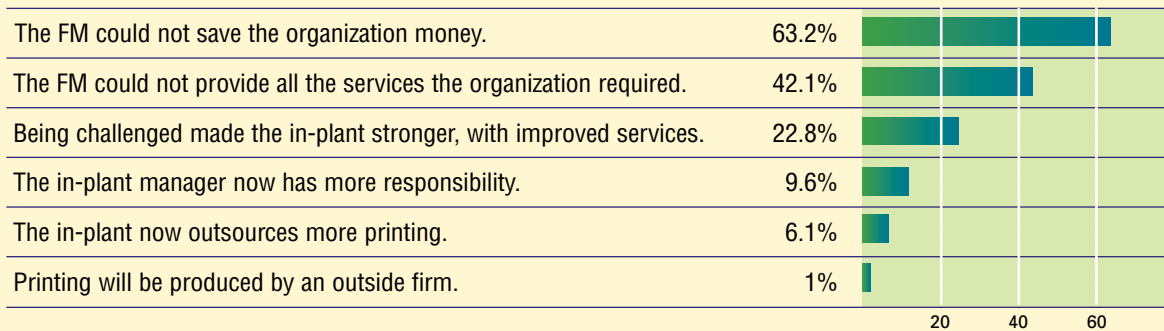
# In-sourcing Expands

In-plants are becoming profit centers, as the following numbers show:

- ▶ **54.3%** of in-plants take in work from customers outside their parent organizations.
- ▶ Those who insource say it makes up **12.9%** of their total revenue.
- ▶ **73.5%** say insourcing has strengthened their in-plants.
- ▶ **49%** are providing insourcing revenue back to their parent organizations.
- ▶ **23.8%** say insourcing has allowed their in-plant to add new equipment.
- ▶ **5%** say insourcing has allowed their in-plant to add employees.

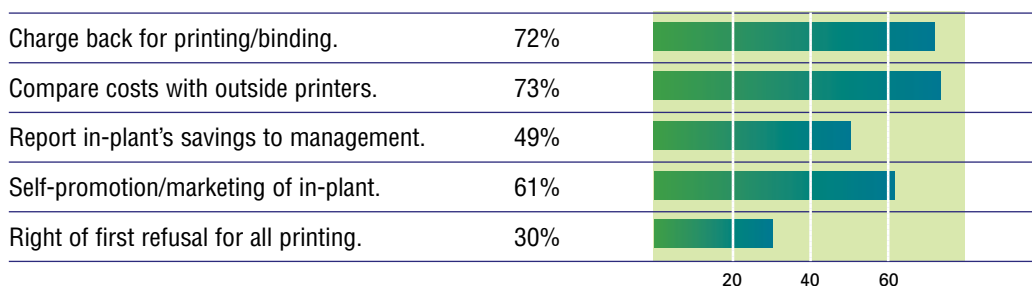
## Impact of Outsourcing

Outsourcing firms have approached 41 percent of respondents' parent organizations over the past two years, offering to take over their printing. Here are the results of those meetings:



## In-plant Best Practices

Here's a look at how many in-plants are involved in these practices.

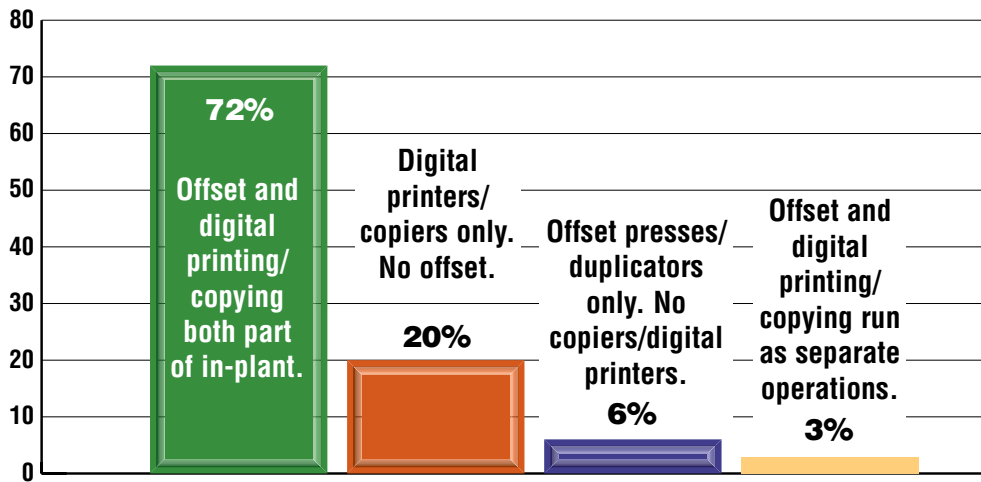




# Offset vs. Digital

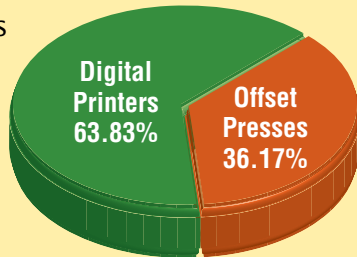
## Offset, Digital or Both?

Most in-plants handle both offset and digital printing.



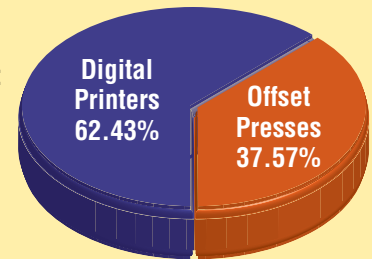
### Four-color

Percentage of four-color pages produced via:



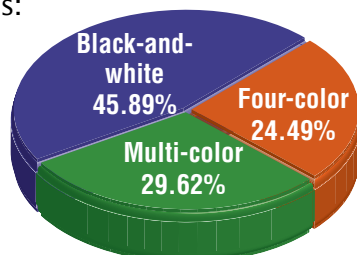
### Monochrome

Percentage of black-and-white pages produced via:



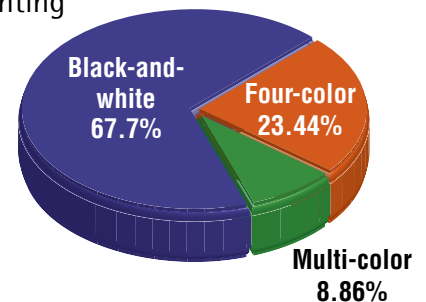
### Offset

Percentage of in-house offset printing that is:



### Non-offset

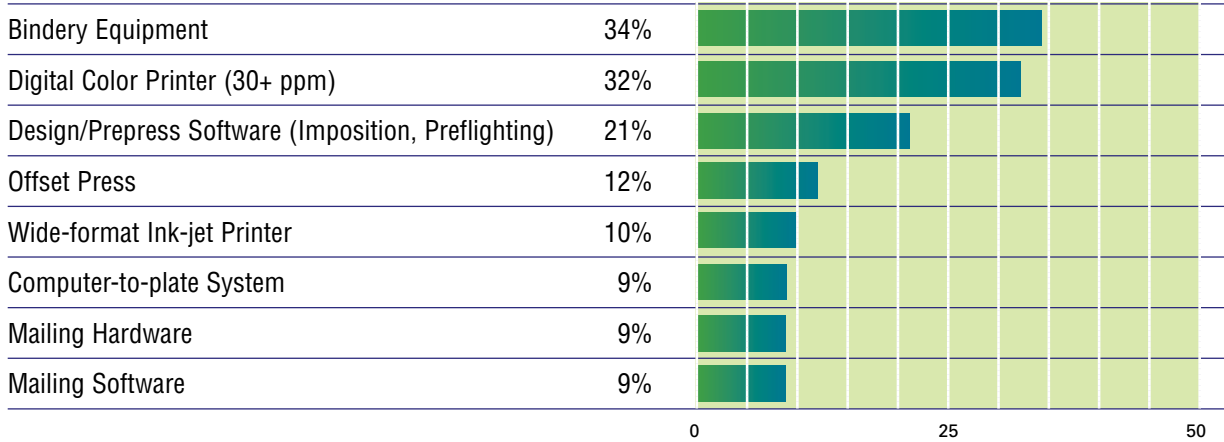
Percentage of in-house non-offset printing that is:



# Equipment Upgrades

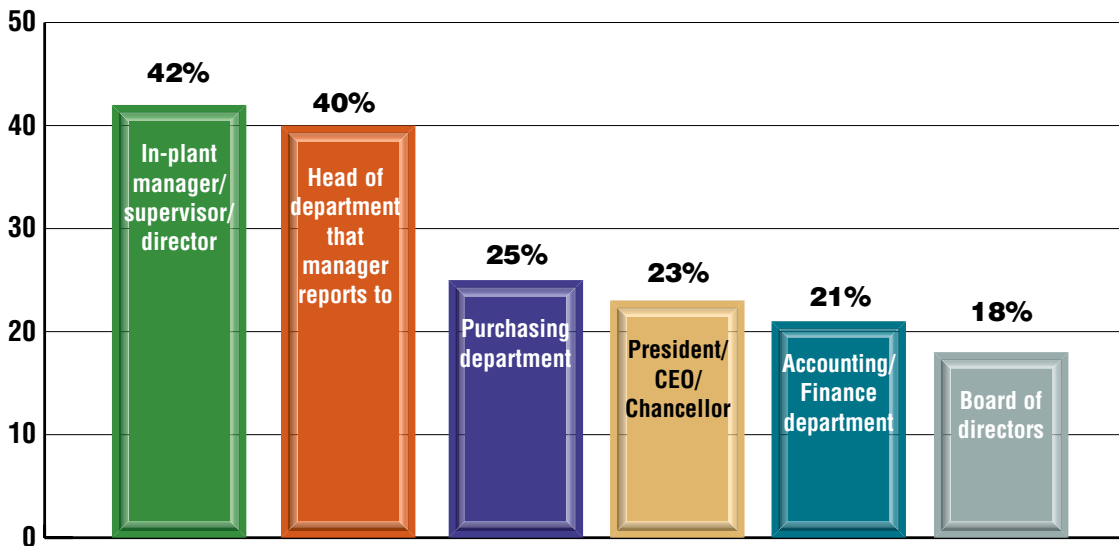
## Purchasing Plans

71 percent of respondents plan to buy or lease new equipment or software in the next 12 months. Here's what's on their lists:



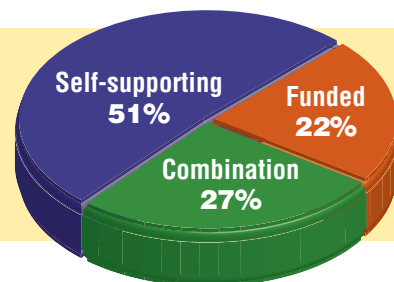
## Purchasing Approval

About 67% say upper management generally supports technology upgrade requests. Here's who has the authority to approve major equipment/software purchases.



## Most Are Self-supporting

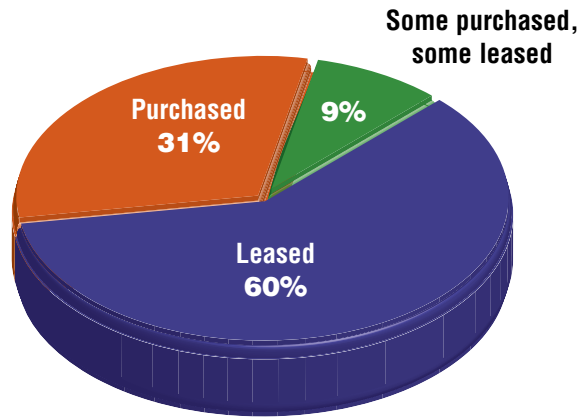
Slightly more than half of all in-plants support themselves by charging back for services, with another 27% partially self-supporting.



# Digital Equipment

## Lease vs. Purchase

About 32% of respondents say they have digital presses. Here's how they obtained them:



## Copiers

Average number of copiers/multifunction printers used for in-plant production:

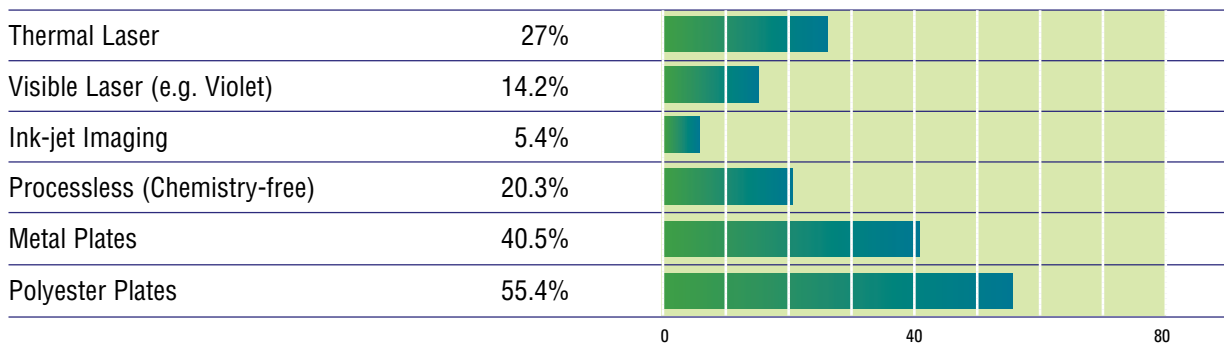
9.4

Average number of copiers/multifunction printers in-plant manager is responsible for:

137.3

## Computer-to-plate

Of those with CTP equipment, here are the types of systems they have.

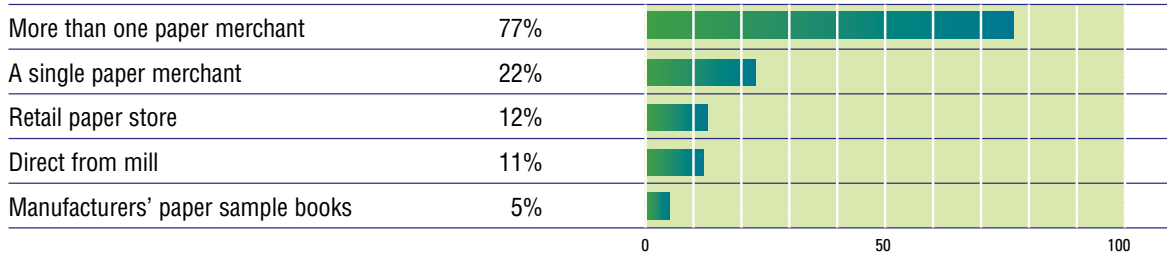




# Paper Trends

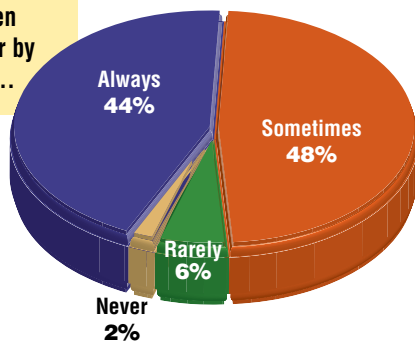
## Shopping Around

Most managers rely on multiple merchants to get the best paper deals.

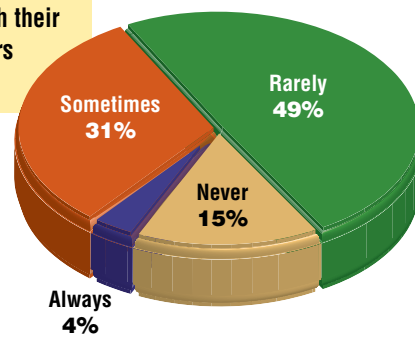


## Brand Name Paper?

In-plants often specify paper by brand name...

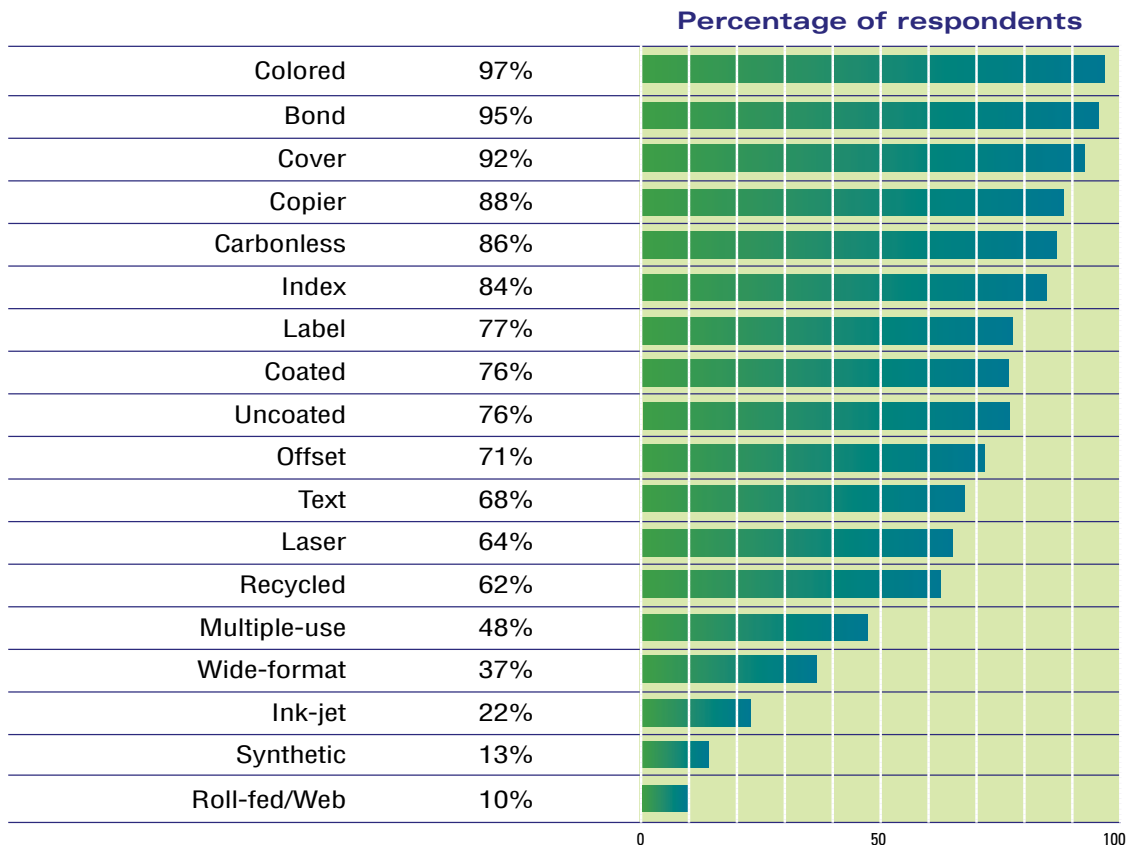


...Though their customers do not.



## Paper Purchasing

Once again colored paper tops the list as the most common paper purchased by in-plants.



# Equipment and Software at In-plants

## SOFTWARE

Percentage that have installed

Digital Storefront/Online Job Submission	38.8%	
Shop Management (e.g. Estimating, Inventory)	47.8%	
Workflow	35.6%	
Proofing	38.1%	
Design, Imposition, Trapping, Preflighting	68%	
Variable Data	38.5%	

## PREPRESS

Digital Proofing	42.1%	
Densitometer/Spectrophotometer	43.2%	
Imagemaster	21.9%	
Computer-to-plate (CTP) system	53.2%	

## PRESSES

Sheetfed Offset (up to 20")	60.4%	
Sheetfed Offset (21" to 29")	26.3%	
Sheetfed Offset (30" to 40")	9.4%	
Sheetfed Offset: One, Two-color	49.6%	
Sheetfed Offset: Four-color+	17.3%	
Direct Imaging Offset Press	6.8%	
Envelope Press	16.2%	
Envelope Feeder	31.7%	



Percentage that  
have Installed

## DIGITAL COPIERS/PRINTERS

B&W Copiers/Printers (up to 80 ppm)	32.4%	
B&W Copiers/Printers (81-99 ppm)	27.3%	
B&W Printers (100+ ppm)	67.3%	
Color Copiers/Printers (up to 40 ppm)	43.2%	
Color Printers (41-99 ppm)	53.2%	
Color Printers (100+ ppm)	6.5%	
Digital Duplicators (e.g. Riso, Duplo)	11.2%	
Wide-format Ink-jet Printers (20" - 36")	17.6%	
Wide-format Ink-jet Printers (37" - 60")	33.1%	
Wide-format Ink-jet Printers (wider than 60")	1.8%	

## BINDERY & FINISHING

Collators	65.5%	
Folding Equipment	95.3%	
Saddle Stitchers	83.5%	
Perfect Binders	35.6%	
Double-loop/Spiral Wire Binders	34.5%	
Paper Cutters	95.7%	
Laminators (wide-format)	36%	
Laminators (conventional)	51.1%	
Drills/Punches	90.6%	
Scoring/Slitting	63.3%	

## ADDRESSING & MAILING

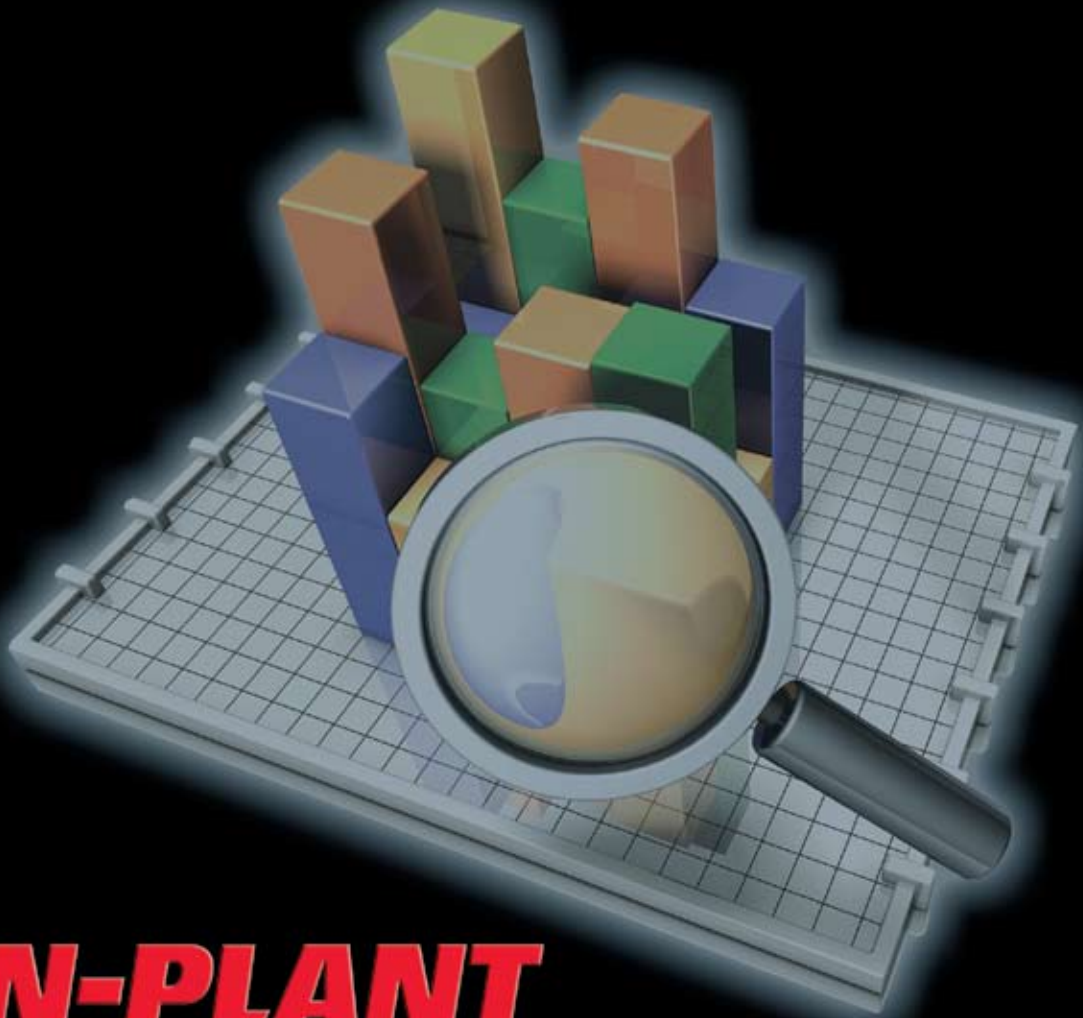
Mailing Software	39.6%	
Ink-jet Addressing/Bar Coding Systems	30.2%	
Inserters	37.4%	
Labeling Systems	20.5%	
Postage Systems	37.8%	
Mail Sorting Equipment	8.6%	
Tabbing Equipment	28.1%	

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