The Largest In-plants

In-plant Impressions

The Largest In-plants

It gets harder every year to list the country's largest in-plants due to corporate privacy concerns, and this year it was even more challenging. Several operations that we've listed for years opted not to participate, some citing COVID-19-related downsizing.

That said, these lists still provide a great look at some of the largest in-house printing operations, broken down by:

- The largest in-plants according to full-time-equivalent employees (half of the part-time/temporary employee count was added to the full-time figure). We included 2019 numbers for comparison this year.
- The largest in-plants according to sales. If a sales figure was not provided, we used the in-plant's annual budget. This year we added details on fiscal year end months.

Largest In-plants by Employees

	In-plant	Employees 2020	2020
1	U.S. Government Publishing Office	493	515
2	State of California	322.5	322.5
3	Church of Jesus Christ of Latter-day Saints	233	245
4	Brigham Young University	152	174
5	CVS Health	100	93.5
6	Church of Scientology, International	98	96
7	State of Tennessee	96	101
8	World Bank Group	92	93
9	State of Oregon	88	88.5
10	University of Washington	81.5	84
11	State of Ohio	68	73
12	State of Michigan	62	64
13	Oregon Corrections Enterprises	60	74
14	Christian Broadcasting Network	56	57.5
14	State of Wisconsin	56	55
16	Pennsylvania State University	54	57.5
16	University of Oklahoma	54	57
18	University of Nebraska-Lincoln	53	51
19	Excellus Health Plan	52	53
20	State of Colorado	50.5	58
21	State of Missouri	48	58.5
22	Mayo Clinic	46	55
22	University of Texas at Austin	46	42
24	University of Tennessee - Knoxville	45.5	45
25	University of Minnesota	43	51
26	Yale University	42.5	44
27	Iowa State University	41	50.5
28	Massachusetts Medical Society	40	50
28	University of Alabama	40	49
30	New York City Police Department	38	38
31	University of Missouri	37	40
32	County of Nassau, N.Y.	36	35
33	State of Kansas	34	36
34	Oregon State University	32.5	38
34	Western & Southern Financial Group	32.5	31
36	University of Virginia	31	30.5
37	New York University	30	30
38	University of Michigan	29	30.5
39	City of Los Angeles	28	28
39	Sanford Health	28	NA
39	Washington State University	28	39
42	Centene Corp.	27	24
42	Houston Independent School District	27	26
44	Bloomberg	26	26
45	Farmers Insurance	25	29
46	State of Montana	24.5	30
46	University of California-San Francisco	24.5	35.5
48	University of North Texas	23	43
49	Robert Half	22	23
50	University of Illinois, Urbana-Champaign	21.5	24
51	Texas Department of Transportation	21	21
52	Colorado Springs School District 11	20	20
52	Indiana University	20	21
54	City and County of San Francisco	19.5	20.5
54	Intermountain Healthcare	19.5	19.5
56	Duke University	19	18
56	Ohio University	19	23.5
58	University of California-Davis	18.5	NA
59	Columbia University	18	20
60	Arizona State University	17.5	23.5
61	Bucknell University	17	20
61	Massachusetts Institute of Technology	17	17
63	Omaha Public Schools	16.5	18.5
64	State of Oklahoma	15.5	NA
65	DCMO BOCES	14.5	20
66	University of Cincinnati	14	22
66	Wooster Brush Co.	14	NA
68	University of Delaware	13.5	14
69	University of Houston	13	17.5
70	Encompass Health	12	31
70	University of Oregon	12	21.5

Green= Staff size increased

Largest In-plants by Annual Sales

	In-plant	Budget ($)	Sales ($)	Reporting Period End
1	U.S. Government Publishing Office	114,300,000	116,000,000	FY-S
2	State of California	85,000,000	85,000,000	FY-J
3	State of Michigan	23,677,164	23,677,164	FY-S
4	State of Oregon	16,348,717	NA	CY
5	State of Colorado	14,313,443	14,502,000	FY-J
6	Brigham Young University	NA	14,500,000	CY
7	University of Oklahoma	13,500,000	13,500,000	FY-J
8	Pennsylvania State University	12,291,000	12,291,000	NA
9	State of Tennessee	14,775,497	12,258,311	FY-J
10	Yale University	11,272,000	11,272,000	FY-J
11	State of Wisconsin	10,500,000	10,500,000	FY-J
12	University of Texas at Austin	9,000,000	9,000,000	FY-A
13	Duke University	8,308,734	8,308,734	FY-J
14	University of Washington	8,205,420	NA	FY-J
15	Encompass Health	8,200,000	8,200,000	CY
16	Farmers Insurance	7,120,560	7,120,560	CY
17	University of Nebraska-≠Lincoln	7,078,234	7,023,478	FY-J
18	University of California-San Francisco	6,624,367	6,624,367	FY-J
19	State of Montana	6,533,444	6,185,012	FY-J
20	Oregon State University	5,986,852	5,913,499	FY-J
21	State of Missouri	5,800,000	5,800,000	NA
22	New York University	5,600,000	NA	FY-A
23	University of Tennessee - Knoxville	5,438,000	NA	FY-J
24	State of Kansas	3,546,000	5,390,000	FY-J
25	University of Minnesota	7,285,031	5,320,909	FY-J
26	City of Los Angeles	5,237,238	5,237,238	FY-J
27	City & County of San Francisco	9,822,661	5,020,225	FY-J
28	University of Missouri	4,600,000	4,600,000	FY-J
29	University of Virginia	4,576,709	4,576,709	FY-J
30	Intermountain Healthcare	2,530,824	4,426,815	CY
31	Columbia University	NA	4,364,164	FY-J
32	Centene Corp.	4,464,980	4,258,987	CY
33	University of California-Davis	4,800,000	3,897,000	FY-J
34	Western & Southern Financial Group	4,100,000	3,825,000	CY
35	Washington State University	3,700,000	3,700,000	FY-J
36	University of Alabama	5,178,000	3,676,226	FY-S
37	Sanford Health	3,675,686	3,675,686	CY
38	Ohio University	3,800,000	3,200,000	FY-J
38	Texas Department of Transportation	3,200,000	3,200,000	FY-A
40	Massachusetts Institute of Technology	NA	3,000,000	FY
40	New York City Police Department	3,000,000	NA	FY-J
42	Houston Independent School District	3,113,281	2,974,405	FY-J
43	University of Cincinnati	2,900,341	2,900,341	FY-J
44	University of Oregon	3,100,000	2,870,000	FY-J
45	Oregon Corrections Enterprises	2,766,985	2,766,985	FY-J
46	DCMO BOCES	2,735,297	2,735,297	FY-M
47	Iowa State University	2,551,620	2,551,620	FY-J
48	Colorado Springs School District 11	2,530,811	2,530,811	FY-J
49	Omaha Public Schools	2,298,799	2,298,799	FY-A
50	Indiana University	2,000,000	NA	FY-J
50	Robert Half	2,000,000	2,000,000	CY
52	Arizona State University	1,992,130	1,992,130	FY-J
53	State of New Mexico	2,037,800	1,875,056	FY-J
54	Mercury Marine	1,387,501	1,867,349	CY
55	University of Michigan	2,936,012	1,790,035	FY-J
56	University of Delaware	1,295,148	1,723,458	FY-J
57	University of Houston	1,683,980	1,683,980	FY-A
58	Methodist Le Bonheur Healthcare	1,530,000	1,680,000	CY
59	Bucknell University	1,400,000	1,650,000	FY-J
60	Deer Valley Unified School District	NA	1,649,720	FY-J

FY=Fiscal Year; CY=Calendar Year; S=Sept.; J=June; A=Aug; M=May

Trends at the Largest In-plants

Mostly Digital Operations

Times have changed. The largest in-plants are now predominantly digital printers, with 36% of respondents printing all of their work digitally. Still, nearly 20% print half or more of their impressions with offset presses.
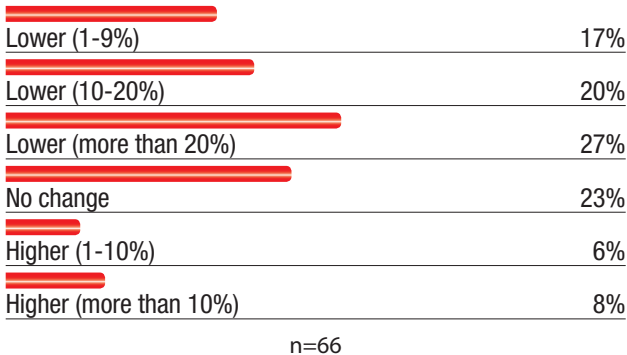
Impressions Printed Digitally:
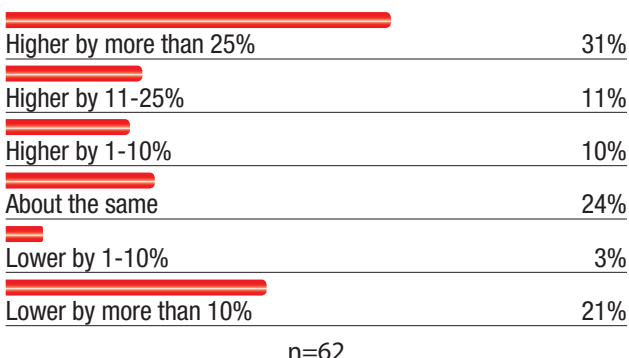
Average: 78% **Median: 90%**

September Sales Sink

Nearly two-thirds of the largest in-plants reported lower revenues in Sept. 2020 than in Sept. 2019.

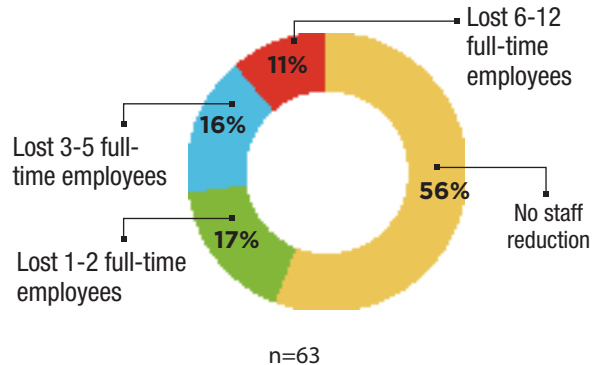|	
Lower (1-9%)	17%
Lower (10-20%)	20%
Lower (more than 20%)	27%
No change	23%
Higher (1-10%)	6%
Higher (more than 10%)	8%

n=66

Wide-Format Growing

An average of 11% of the largest in-plants' annual revenue comes from wide-format inkjet printing. What's more, 13% of respondents credit wide-format for a quarter of their sales. Like many, they have taken advantage of the need for social distancing signage during the pandemic; 52% report printing higher volumes of wide-format in the six months between April-September 2020 than in the same period a year ago.

Wide-Format Volume: April-Sept. 2020 vs. 2019

|	
Higher by more than 25%	31%
Higher by 11-25%	11%
Higher by 1-10%	10%
About the same	24%
Lower by 1-10%	3%
Lower by more than 10%	21%

n=62

Staff Reductions

The good news is that 56% of the largest in-plants have not had to cut staff because of the pandemic. But there have been cuts.


- 11%
- Lost 6-12 full-time employees
- 16% Lost 3-5 full-time employees
- 56% No staff reduction
- 17% Lost 1-2 full-time employees

n=63

Rates Mostly Unchanged

For the most part, the pandemic has not forced in-plants to adjust their rates.

- 10% Lowered rates
- Raised rates 3%
- 87% No change

n=63
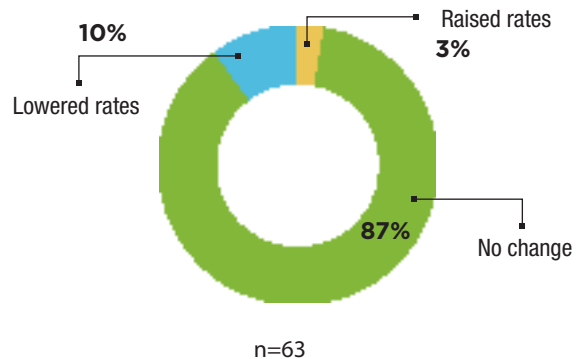
Future Outlook

Many of the largest in-plants are optimistic business conditions will improve for their in-plants over the next six months.

- 41% Improve
- Uncertain 33%
- 11% No change
- 14% Decline

n=63
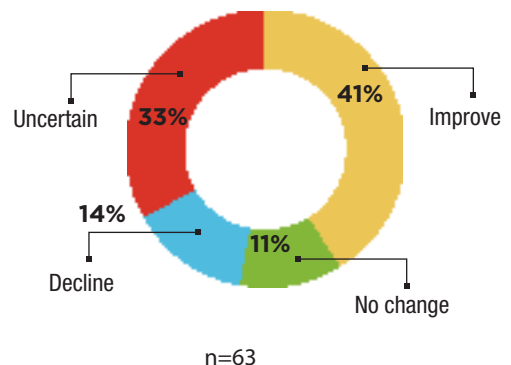
Moving Ahead With Upgrades

Despite current economic conditions, 61% of the country's largest in-plants say they plan to buy, lease, or upgrade their equipment/software in 2021. This is down from 90% who said they would upgrade in our 2019 survey of the largest in-plants. Here's what respondents told us they are planning on getting in the year ahead:

Printing

Digital color toner press	45%
Digital B&W toner press	27%
Wide-format printer (hybrid/flatbed)	21%
Wide-format printer (roll-fed)	15%
Production inkjet press (cut-sheet)	15%
Production inkjet press (roll-fed)	12%
Digital envelope printer	12%
Direct-to-garment printer	9%
Sheetfed offset press	3%
Dye-sublimation printer	3%

n=33

Software

Workflow/Production Automation	41%
Print MIS	32%
Web-to-print	27%
Mailing	27%
Graphic Design	23%
Color Management	14%

n=22

Bindery

Saddle stitcher	24%
Inserter	24%
Paper cutter	19%
Contour cutter	19%
Scoring/Slitting equipment	14%
Perfect binder	14%
Folder, Laminator	10%

n=21

WHO WE ARE

In-plant Impressions

In-plant Impressions is the only graphic arts magazine written specifically for the in-plant printing industry. Readers know they can trust *In-plant Impressions* to provide up-to-date, insightful articles designed to help them increase productivity, save money and stay competitive. The magazine is supplemented by our website and e-newsletter. *IPI* also produces videos, webinars and live events and conducts numerous research projects like this one throughout the year to better understand the in-plant market.

NAPCOMEDIA

NAPCO Media LLC, *In-plant Impressions*' parent company, is a leading B-to-B media company specializing in creating community through content via integrated media programs, video services, marketing services, events and event management, custom content, eLearning and market research. NAPCO Media has rapidly expanded its portfolio to include NAPCO Video Services, NAPCO Events, NAPCO Marketing Services and NAPCO Research.

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• Landscape insight
• User needs and wants
• Product features and functionality
• Content marketing strategy
• Sales strategy and tactics
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