Print Business Outlook Series

In-Plant Printing KPI Report
Executive Summary

NAPCO**RESEARCH**
a service of **NAPCO**MEDIA

PRINTINGUNITED
ALLIANCE

SUMMER 2024

Staying on top of industry trends is essential to your success.

Throughout the year, PRINTING United Alliance's research team creates top-notch reports for the industry and works with consultancies to conduct commissioned research.

PRINTING United Alliance members get unlimited access to the resulting reports that reflect the scope of the printing industry.

Visit: https://www.printing.org/library/business-excellence/economics-forecasting/industry-reports

If you have any questions, please contact researchteam@printing.org.

Executive Summary

The *In-plant Printing KPI Report, Summer 2024* is based on a survey of 134 in-plant printing facilities conducted by PRINTING United Alliance and NAPCO Research. Participants serve a diverse group of parent organizations including school districts, healthcare providers, and religious organizations, have annual operating budgets ranging from less than $500,000 to more than $20 million, and have staff ranging from fewer than five employees to more than 60.

Topics covered include:

- Applications printed in-house.

- Efficiency metrics such as job on-time delivery rates, jobs reproduced because of production errors, and budget/ revenue per employee.

- To what extent in-plants are automating, tracking waste, and integrating artificial intelligence into their facilities.

- How budgets/revenues, the volume of pages printed in total and by number of colors, and the number of services offered to the parent organization are trending.
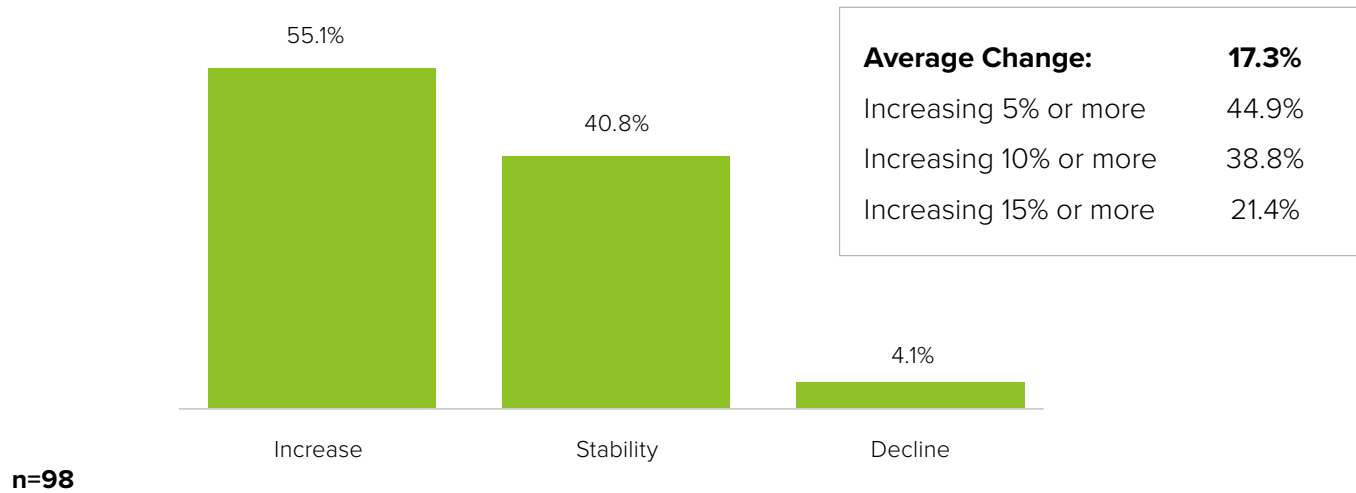
- Biggest opportunities and challenges.

Canon U.S.A., Inc. is a leader in digital imaging and printing solutions with one of the broadest portfolios in the industry, offering solutions such as digital presses, production ink-jet presses, wide-format printers, workflow solutions and professional services. With approximately $30.6 billion in global revenue, its parent company, Canon Inc. (NYSE:CAJ), as of 2021 has ranked in the top-five overall in U.S. patents granted for 36 consecutive years and was one of Fortune Magazine's World's Most Admired Companies in 2022. Canon U.S.A. is dedicated to its Kyosei philosophy of social and environmental responsibility.

Sample Findings

Wide-format volume is growing. Nearly three-quarters of in-plants surveyed offer wide-format printing, with the highest percentages offering posters/presentation graphics (90.4%), banners/soft signage/flags (78.7%), and directional signage/directories (67.0%). On average, volume is growing 6.9%, increasing for 55.1%, steady for 40.8%, and declining for just 4.1%. Nearly two-fifths report wide-format volume is growing by 10% or more (Figure 1).

Figure 1: Wide-Format Volume Trend

Q: Are you experiencing an increase, stability, or decline in your volume of wide-format printing?

Average Change:	**17.3%**
Increasing 5% or more	44.9%
Increasing 10% or more	38.8%
Increasing 15% or more	21.4%

n=98

Four-or-more color pages boost page counts. The volume of pages printed in-house increased last year for 61.1% of participants in our research, significantly greater than the 38.9% for whom page counts were unchanged (18.3%) or decreased (20.6%). As Figure 2 shows, 64.1% report an increase in four-or-more color pages, while 44.8% report an increase in one-to-three color pages and 42.0% an increase in black & white pages.

Figure 2: Page Volume Trends 2023

Q: How did the volume of pages your in-plant produced in 2023 compare with year-earlier volume?

| Page Type	Responses	Increased	Unchanged	Decreased
Total	131	61.1%	18.3%	20.6%
Black & white	131	42.0%	28.2%	29.8%
One-to-three color	116	44.8%	43.1%	12.1%
Four-or-more color	117	64.1%	23.9%	12.0%

Majority are pursuing automation. Nearly 66.0% of in-plant printing facilities surveyed are actively seeking automation features on equipment or workflow. Reasons extend from improving productivity, cited by 55.0%, to compensating for the shortage of skilled workers, cited by 20.9% (Figure 3).

Figure 3: Automation

Q: Are you actively seeking automation features on equipment or workflow automation?
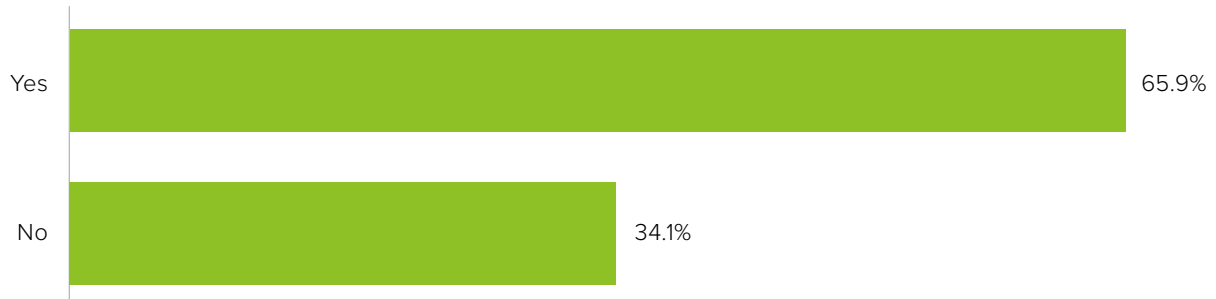
Q: If you are, for which of the following reasons?

n=98
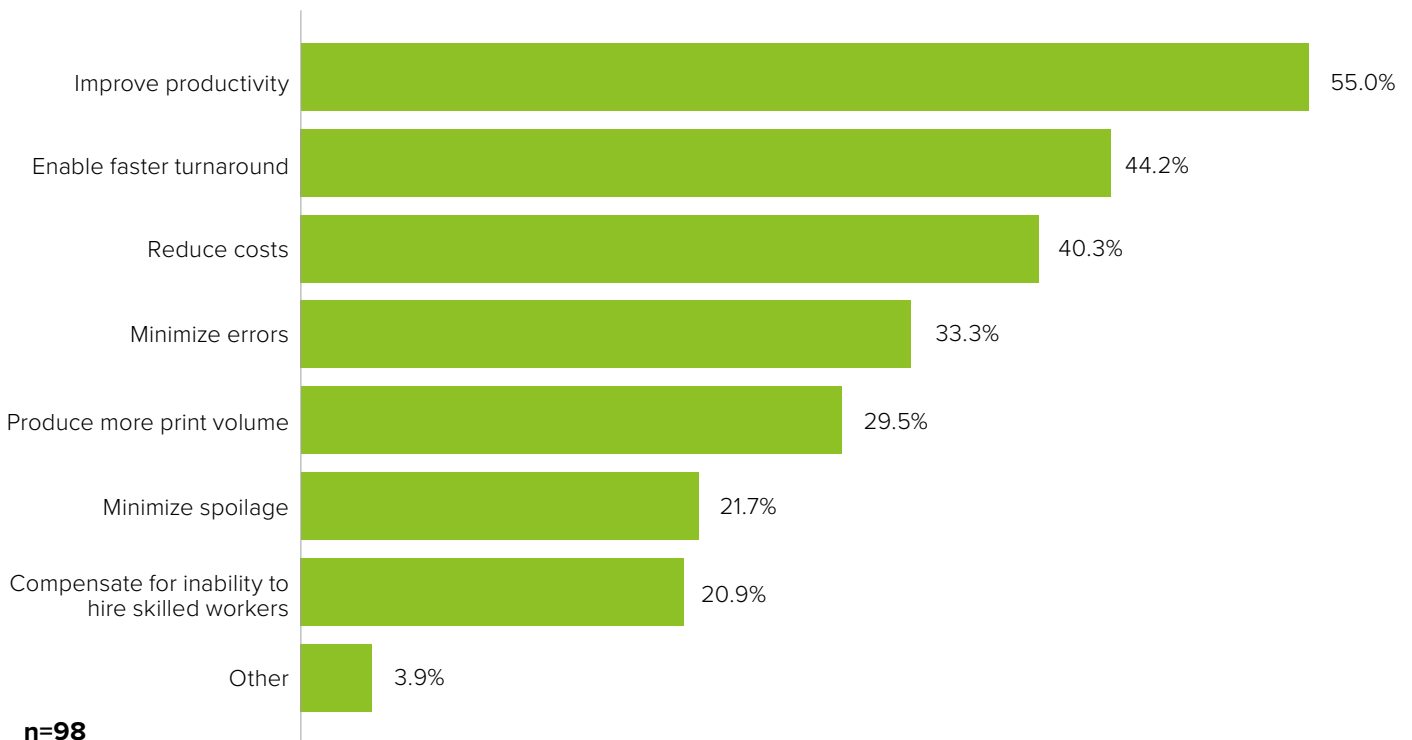
Three opportunities and a big challenge. Opportunities fall into three main categories: Increase efficiency through capital investment, including MIS and web-to-print, automation, and "changing over to all digital"; expand capabilities, particularly in wide-format; and promote capabilities more effectively. Labor shortages were the most frequently cited challenge by far, with broad agreement that "finding qualified people who can put ink on paper," not a lack of work, is the biggest obstacle to growth.

PRINTING United Alliance members can download the *In-plant Printing KPI Report, Summer 2024* here.

JOIN OUR PANEL!

Members of the
State of the Industry Panel
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.

**Follow the link below to
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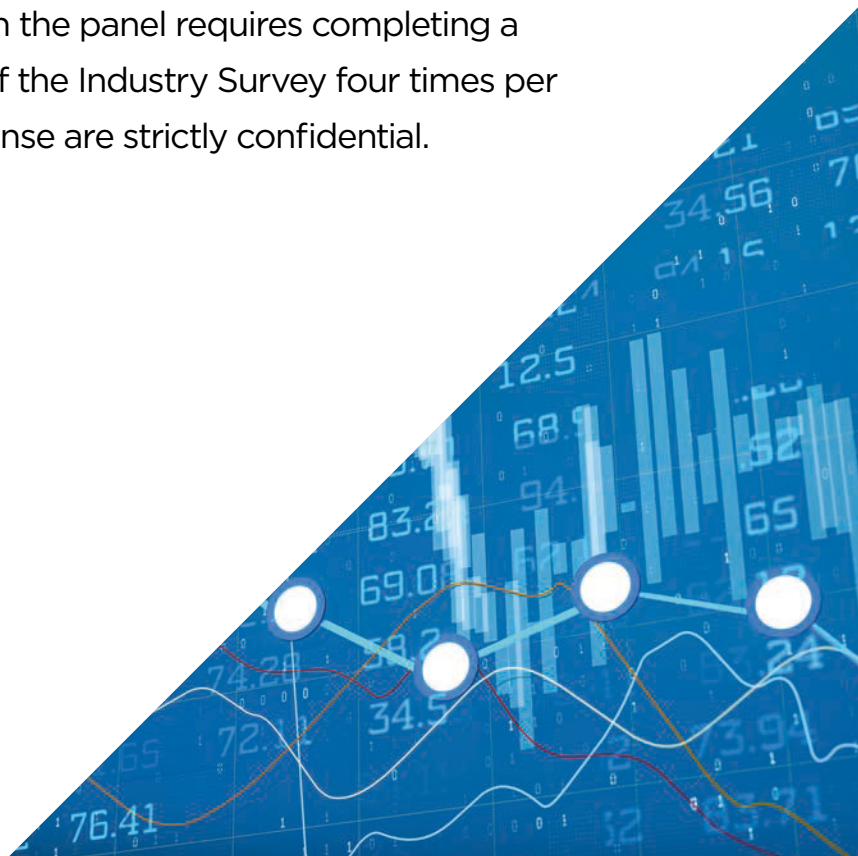
WHO WE ARE

PRINTINGUNITED
ALLIANCE

PRINTING United Alliance is the most comprehensive member-based printing and graphic arts association in the United States, comprised of the vast communities which it represents. The Alliance serves industry professionals across market segments with preeminent education, training, workshops, events, research, government and legislative representation, safety, and environmental sustainability guidance, as well as resources from the leading media company in the industry – NAPCO Media. Now a division of PRINTING United Alliance, Idealliance is the global leader in standards training and certification for printing and graphic arts operations across the entire industry supply chain.

PRINTING United Alliance also produces the PRINTING United Expo (Sept. 10-12, 2024, Las Vegas, the most influential days in printing. The expansive display of technology and supplies, education, programming, and services are showcased to the industry at large, and represents all market segments in one easily accessed place.

NAPCORESEARCH

NAPCO Research crafts custom data-centric solutions that leverage our highly engaged audiences across the markets in which we operate, our industry subject matter experts and in-house research expertise. We partner with our clients to identify their unique business problem and create solutions that enable deeply informed decision-making.

Contact research@napco.com to talk with our analysts to find out how we can help you with your research needs.

WHAT CAN PRINTING UNITED ALLIANCE RESEARCH DO FOR YOU?

PRINTING United Alliance research provides first-hand accounts, analysis, and ongoing monitoring of critical industry trends influencing the printing industry, future trends, and the underlying factors influencing change. PRINTING United Alliance Research is now part of an expanded research team that includes NAPCO Research experts, survey and analysis capabilities, and additional audience reach.

■ **PRINTING United Alliance Research LEVERAGES** its extensive member community and staff of industry economic, legislative, marketing, and technical experts to support customers in identifying market opportunities and improving business profitability and operations.

■ We partner with our clients to **IDENTIFY** their unique business challenges and create solutions that **ENABLE** deeply informed decision-making and **DELIVER** results.

■ Gain access to PRINTING United Alliance's & NAPCO Media's engaged audiences of industry executives across key industries.

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■ Benchmarking
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■ Analyst Presentations at Events

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550K+ FOR:

■ Surveys, focus groups
■ Distribution of thought leadership for lead-generation

THE PRINTING UNITED ALLIANCE RESEARCH DIFFERENCE

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MARKET REACH & EXPOSURE

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MEET THE RESEARCH TEAM

Nathan Safran
Vice President, Research
NAPCO Research
nsafran@napco.com

Lisa Cross
Principal Analyst
NAPCO Research
lcross@napco.com

Andy Paparozzi
Chief Economist
PRINTING United Alliance
apaparozzi@printing.org

Onamica Dhar
Economist
PRINTING United Alliance
odhar@printing.org

Cory Francer
Analyst
NAPCO Research
cfrancer@napco.com

Evan West
Data Analyst
NAPCO Research
ewest@napco.com

Get in touch with our research team to arrange your free research consultation. Contact nsafran@napco.com

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