In-Plant Printing KPI Report Summer 2025

EXECUTIVE SUMMARY

ALLIANCE RESEARCH

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SUMMER 2025

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Executive Summary

This report is the second in a two-part series presenting key insights from the 2024 In-plant Printing Key Performance Indicators (KPI) Survey, conducted by PRINTING United Alliance and NAPCO Research. The findings reflect a broad and diverse group of in-plant printing operations, with participants representing a wide range of industries, operating budgets from under $500,000 to over $20 million, and staff sizes ranging from fewer than five employees to more than 60.

The report offers a detailed look at operational performance across the in-plant sector. It begins with overall survey results and then breaks down the data by organization size and whether the in-plant handles work for external clients. This approach helps reveal important differences and trends within the industry.

The report concludes with a forward-looking view of the business environment in 2025, offering strategic insights to help in-plant leaders adapt to continued uncertainty and change.

SAMPLE FINDINGS

Wide-format printing continues to be a strategic growth area for in-plants, helping reduce outsourcing, support internal needs, and attract external business. 71.9% of in-plants surveyed offer wide-format services, with an average of five applications per facility. Common offerings include posters and presentation graphics, while others provide niche products like digital displays.

- **Company Size Impact:** Adoption and growth in wide-format printing are strongest among mid-sized in-plants (5–19 employees) and large in-plants (20 or more employees), with participation rates of 81.3% and 75.5%, respectively. Over 70% of both groups report increased output, averaging 8–9% growth. These in-plants also offer a broader range of applications compared to small in-plants (fewer than 5 employees).

- **External vs. Internal Service Focus:** In-plants serving external clients significantly outperform internal-only operations 79.5% vs. 61.4% in wide-format adoption rates and 8.2% vs. 4.7% in average wide-format growth rates, highlighting how external demand drives expansion.

Figure 1: Wide-Format Applications Offered

All In-plants Surveyed

Q: Does your in-plant offer wide-format applications?

Offering wide-format applications	Number	Percent
Yes	97	71.9%
No	38	28.1%

Based on Company size

Q: Does your in-plant offer wide-format applications?

	Fewer than 5 Employees		5 to 19 Employees		20 or more Employees	
	Number	Percent	Number	Percent	Number	Percent
Yes	33	64.7%	39	81.3%	40	75.5%
No	18	35.3%	9	18.8%	13	24.5%

Based on the work performed for organizations outside the parent company:

Q: Does your in-plant offer wide-format applications?

	Work for companies outside parent organization		Do not work for companies outside parent organization	
	Number	Percent	Number	Percent
Yes	62	79.5%	35	61.4%
No	16	20.5%	22	38.6%

PAGE VOLUMES

Overall, page volumes are trending upward. The most significant growth is expected in four-or-more color printing, with 60.3% of in-plants surveyed anticipating an increase. The majority expect one-to-three-color printing to remain flat, with only 40.6% projecting growth and more than half (52.8%) expecting no change. For black-and-white printing, 39.2% of respondents forecast growth, while 44.0% expect volumes to remain steady. Growth expectations are strongest among mid-sized and large in-plants, while smaller operations are more likely to maintain current volume levels.

Figure 2: Page Volume Trends 2024

All In-plants Surveyed

Q: How do you expect the volume of pages your in-plant will produce in 2024 to compare with year-earlier volume?

	All In-plants Surveyed			
Page Type	Responses	Increased	Unchanged	Decreased
Total	128	60.2%	32.0%	7.8%
Black & white	125	39.2%	44.0%	16.8%
One-to-three color	106	40.6%	52.8%	6.6%
Four-or-more color	116	60.3%	33.6%	6.0%

AUTOMATION

Automation is a growing priority across the in-plant printing sector, with 65.4% of in-plants surveyed actively investing in workflow or equipment automation. The main goals include improving productivity (54.6%), speeding up turnaround times (43.8%), and addressing challenges tied to skilled-labor shortages (20.8%).

Mid-sized (80.9%) and large (78.4%) in-plants are leading the way, viewing automation as essential to operational efficiency. In-plants serving external clients are also more likely to adopt automation (73.7%) compared to those serving only internal stakeholders (53.7%).

Figure 2: Automation

All In-plants Surveyed

Q: Are you actively seeking automation features on equipment or workflow automation?

Seeking automation features	Number	Percent
Yes	85	65.4%
No	45	34.6%

Based on Company size

Q: Are you actively seeking automation features on equipment or workflow automation?

Seeking automation features	Fewer than 5 Employees		5 to 19 Employees		20 or more Employees	
	Number	Percent	Number	Percent	Number	Percent
Yes	23	47.9%	38	80.9%	40	78.4%
No	25	52.1%	9	19.1%	11	21.6%

Based on the work performed for organizations outside the parent company:

Q: Are you actively seeking automation features on equipment or workflow automation?

	Work for companies outside parent organization		Do not work for companies outside parent organization	
	Number	Percent	Number	Percent
Yes	56	73.7%	29	53.7%
No	20	26.3%	25	46.3%

Finally, The *In-Plant Printing KPI Report, Summer 2025* acknowledges the uncertainty introduced by recent tariff policies and their potential economic impact. Despite concerns reflected in declining consumer sentiment, the report emphasizes that in-plant operations can maintain resilience and momentum through proactive strategies.

PRINTING United Alliance members can download the *In-plant Printing KPI Report, Summer 2025* here.

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PRINTINGUNITED
ALLIANCE

PRINTING United Alliance is North America's most comprehensive member-based printing and graphic arts association, comprised of the industry's vast communities. The Alliance serves industry professionals and its members with preeminent education and training via iLEARNING+, workshops, events, research, government and legislative representation, safety, and environmental sustainability guidance, as well as resources from our leading media brands – *Printing Impressions, Packaging Impressions, Wide-format Impressions, In-plant Impressions,* and *Apparelist.* A division of PRINTING United Alliance, Idealliance is a 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, 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.

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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. Alliance Research is now part of an expanded research team that includes PRINTING United Alliance Research experts, survey and analysis capabilities, and additional audience reach.

▪ **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.

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