In-plant Equipment Investment Trends (2025)

In-plant Impressions

NAPCO RESEARCH
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In-plant Equipment Investment Trends

EXECUTIVE SUMMARY

To meet fluctuating demands, enhance efficiency, and control costs, in-plants continually assess their equipment and explore new production technologies that expand their application capabilities. Supporting their parent organizations' communication efforts requires strategic equipment investments, driven by advancements in technology and shifting industry trends.

To gain insight into the equipment in-plants utilize and their future investment plans, *In-plant Impressions* conducted a nationwide survey of in-plant managers across various industries. The results highlight the strength of the in-plant segment and its ongoing commitment to modernization.

Survey results indicate in-plants are striving to keep up with technology and modernize capabilities. Consider the following high-level key findings:

- All respondents are using digital printing devices, with just 21% also using offset presses.
- With 48% of respondents reporting an increase in toner printing volumes this year compared with two years ago, it's no surprise that the top three planned purchases over the next two years are all toner production printing devices.
- Cut-sheet production inkjet presses are now in place at 15% of respondents' in-plants, and 7% have plans to add them in the next two years.
- Despite the wealth of information available online, the top three methods employed by in-plants when researching new equipment all involve traveling to events or demo centers. The vast majority of participants say upper management generally approves their equipment requests.
- The No. 1 reason in-plants choose to get new equipment is to produce new types of work and add services, revealing a shift in focus from basic operational needs to strategic growth.
- The push to explore new offerings like apparel printing is apparent in the fact that direct-to-film (DTF) printers are among the top five planned investments by in-plants over the next two years.
- Wide-format printers continue to grow in popularity at in-plants, with 86% now having at least one, and 52% having two or more.
- Hybrid and small flatbed printers were among the most purchased items in the past two years, however demand is now tapering off.

METHODOLOGY

In-plant Impressions surveyed in-plant managers/directors in December 2024 and January 2025. The survey aimed to uncover trends in equipment usage and investment among in-plants. In total, 108 in-plant managers completed the survey and represented a variety of industries. Figure 1 provides a breakdown of survey respondents by market segment.

Survey Respondents

MARKET SEGMENTS	PERCENTAGE OF RESPONDENTS
College/University	45%
School District	20%
Government/Military	13%
Healthcare	5%
Manufacturing	4%
Insurance	4%
Nonprofit Association	3%
Transportation/Communications	2%
Financial Services/Banking	1%
Retail/Wholesale	1%
Amusement Park	1%
Trade School	1%
Financial Services/Banking	1%
Professional Services (Consulting, Legal, Business Services)	1%

Figure 1
Q: What is the primary business of your parent organization?
N = 114 In-plant Printers

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Most respondents (62%) manage in-plants with between one and 10 employees (Figure 2), and more than half (53%) have annual operating budgets of $1 million or more (Figure 3).

RESEARCHING AND BUYING EQUIPMENT

In-plants have long embraced digital printing, transitioning from offset to toner-based digital presses at a faster pace than the commercial print market. Today, digital printing dominates in-plant operations, with production inkjet and wide-format inkjet technologies gaining significant traction. These investments position them to better serve their parent organizations, ensuring they remain efficient, adaptable, and competitive in an evolving print landscape.

This adaptability is evident in the way in-plants are selecting equipment. Since our 2023 equipment survey, in-plants have shifted their focus from basic operational needs to strategic growth and efficiency. The No. 1 reason for getting new equipment is now “to produce new types of work/add services,” which surged from 47% of respondents in 2023 to 60% in 2025 (Figure 4), making it the top motivator. This indicates a growing emphasis on diversification and expanding service offerings.

Employees

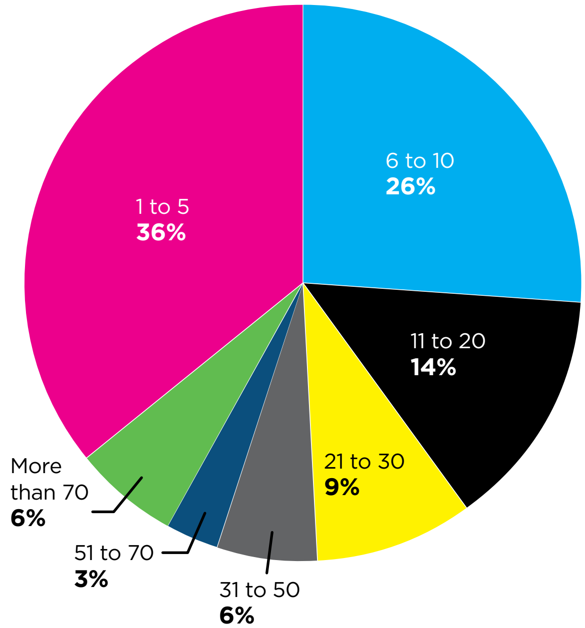

Figure 2
Q: How many full-time employees work in your in-plant? (Add half of your part-time/student employee count to full-time number.)
N = 112

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Annual Operating Budget

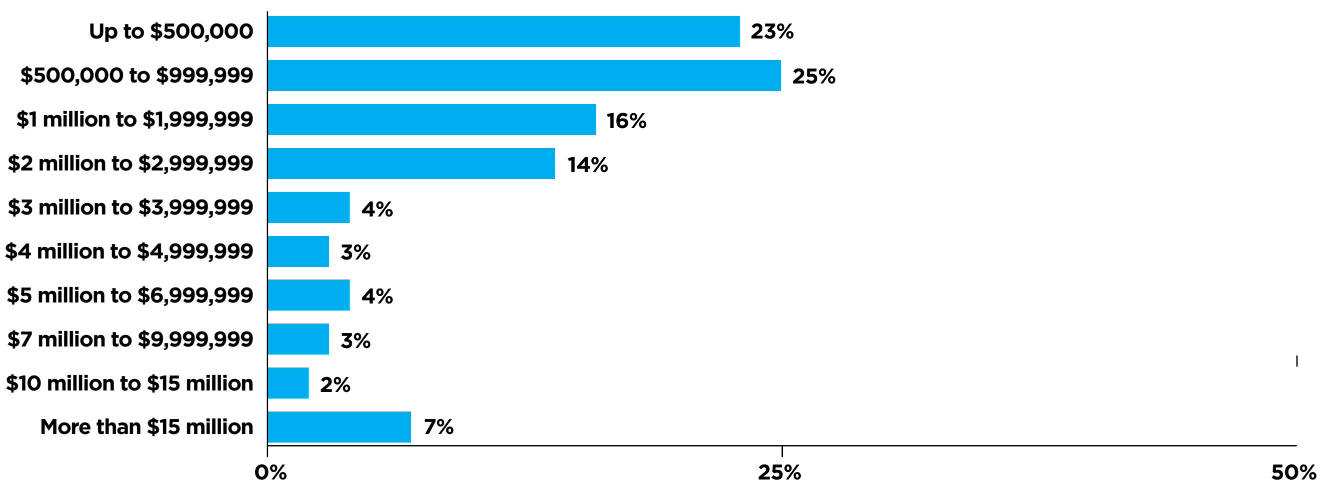

Figure 3
Q: What is your in-plant’s annual operating budget (or annual sales, if you’re not budgeted)?
N = 108

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Another notable reason for adding equipment is automation. In 2023, the desire for automation motivated just 14% of respondents to seek new equipment. That number has grown to 46%, highlighting the increasing reliance on automation to address labor shortages and improve operational efficiency.

Reasons for Adding Equipment

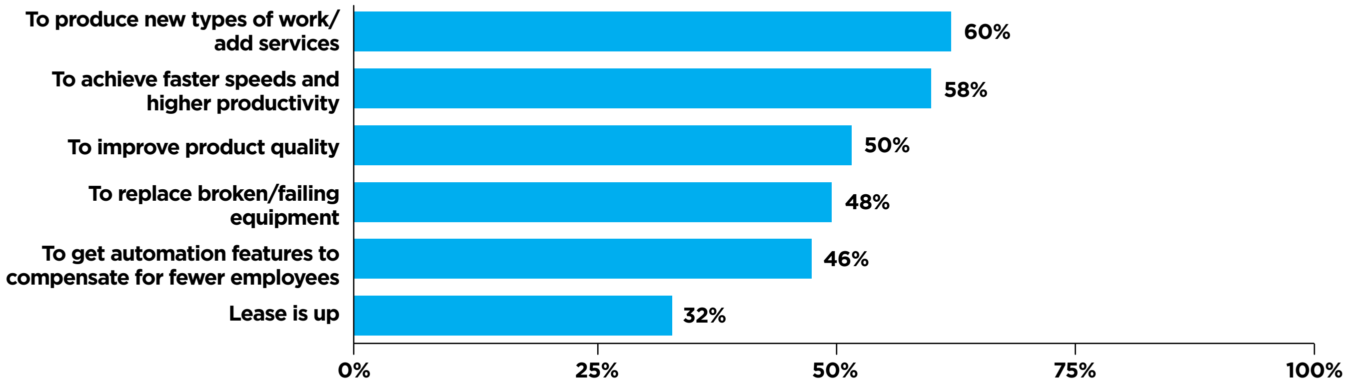

Figure 4
Q: What are the top 3 reasons you choose to get new equipment?
N = 103

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The desire to achieve faster speeds and higher productivity jumped from 50% two years ago to 58% this year, reflecting ongoing demand for efficiency and optimization. Interestingly, the approaching end of the lease motivates only 32% to seek new equipment in 2025, down from 41% in 2023. .

Between 2023 and 2025, a noticeable shift has developed towards in-person, peer-driven research methods for investigating equipment and software, with a corresponding decline in reliance on digital searches and vendor-produced content. This trend reflects a desire for authentic, experiential insights over generalized information.

Reliance on trade shows to research equipment, the No. 1 response, increased from 62% in 2023 to 71% in 2025 (Figure 5), and gaining equipment insights from peers rose significantly from 47% to 59%, both reaffirming the value of hands-on experiences and networking. On the other hand, using Google searches to research equipment dropped significantly from 49% who preferred this in 2023 to 27% in 2025. Similarly, watching online videos decreased from 44% to 37%, as respondents seek more live demonstrations. And while the use of vendor demo centers as research tools increased slightly from 47% to 51%, vendor marketing materials declined from 38% to 33%.

Though dealer purchases remain dominant, there is a clear trend towards more direct OEM engagements, increased leasing from OEMs, and a growing interest in used equipment and vendor financing options (Figure 6).

While the percentage that purchased from a dealer remained constant at 62% in both 2023 and 2025, the percentage that purchased from an OEM rose from 30% to 40%, while the percentage who leased from an OEM increased from 23% to 29%. The percentage that acquire equipment through a bidding process remained steady at 34%, while used equipment purchases rose from 7% to 12% over the past two years.

Researching Equipment

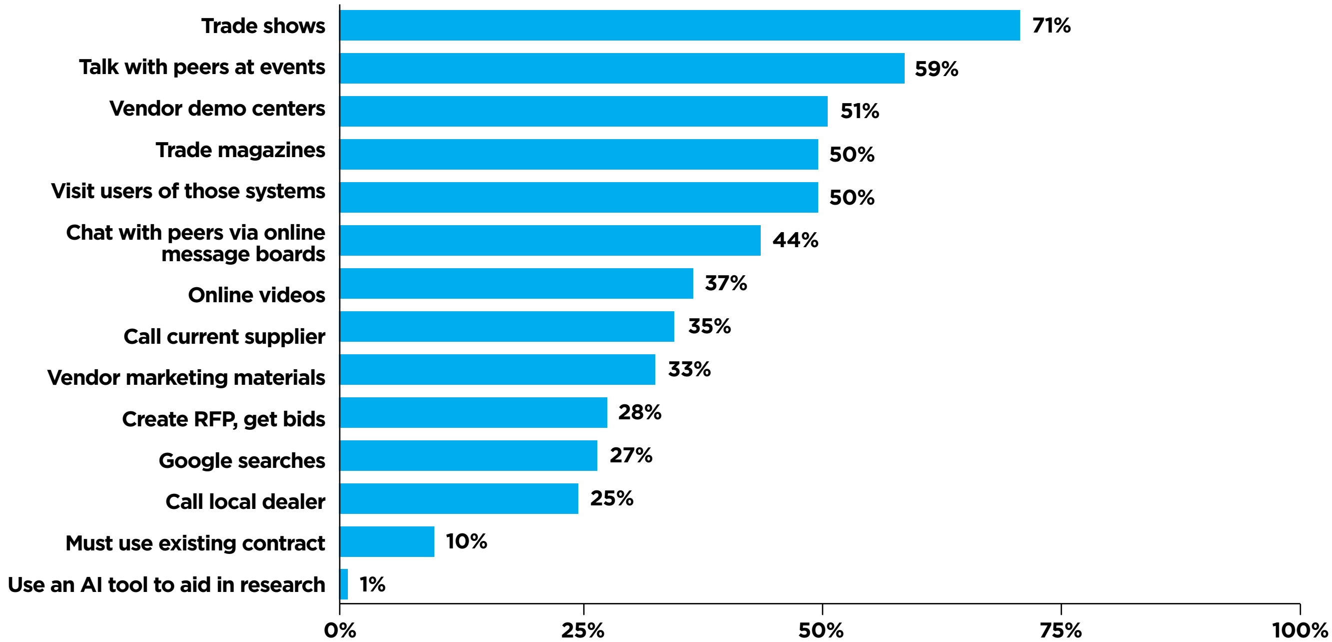

Figure 5
Q: How do you research new equipment and software? (Pick top 5)
N = 102

Leased or Purchased?

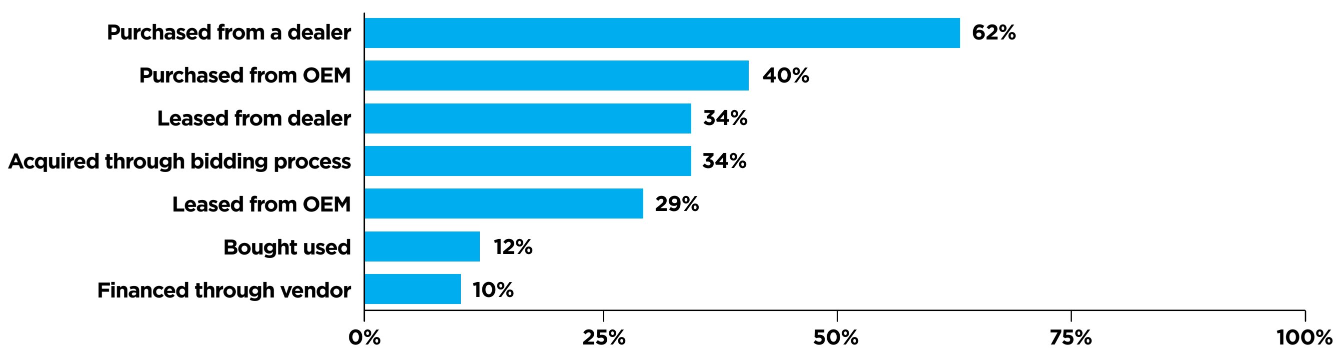

Figure 6
Q: How do you acquire equipment?
N = 101

Since in-plant managers report to departments that lack a deep understanding of the printing business, their equipment desires are not always granted. Fortunately, most respondents say their requests are generally approved by their upper management (Figure 7). While justification reports are common, they are not universally required, and bureaucratic challenges are limited to about one-third of respondents. The presence of equipment funds in some organizations helps facilitate smoother acquisitions.

Equipment Justification

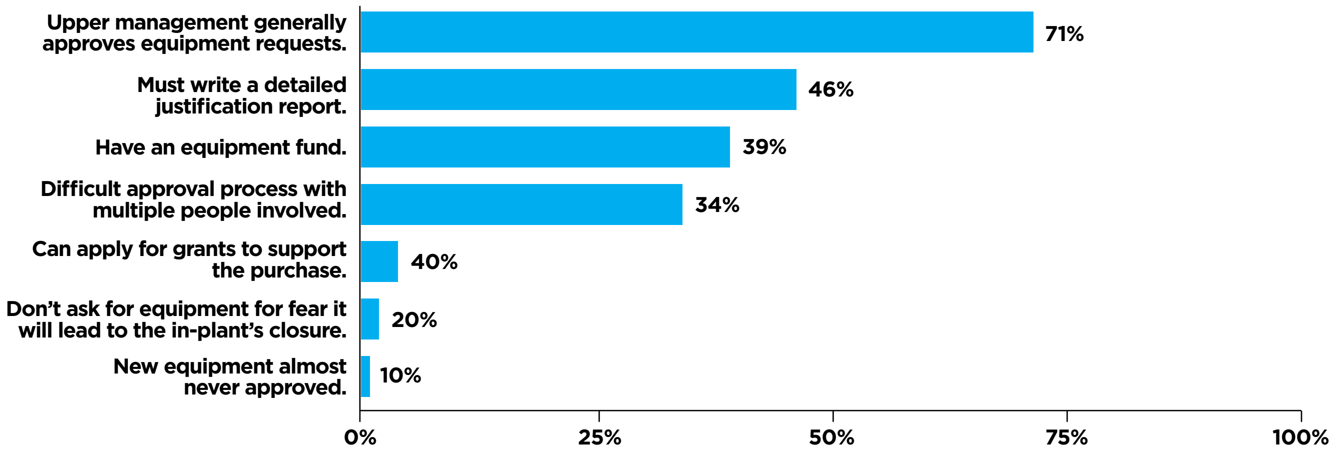

Figure 7
Q: When your in-plant wants new equipment, which of these apply?
N = 101

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DIGITAL PRINTING AND BEYOND

Digital printing has become a technology staple at in-plants. Every in-plant surveyed utilizes digital production printing devices, and digital printing generates the largest percentage of their revenue (63%) according to *IPI*'s 2024 research report, "Trends and Services in the In-plant Industry."

Meanwhile, the use of offset presses at in-plants is steadily declining. In 2016, 53% of in-plants surveyed by *IPI* operated both offset and digital presses. This number fell to 42% in 2023, and as of this year, only 21% still use an offset press (Figure 8). The latest research reveals that 79% of in-plants now rely exclusively on digital printing equipment, up from 58% in 2023. This shift is expected to continue as the demand for shorter print runs drives more in-plants to retire their legacy offset equipment.

A quick look at the equipment that survey respondents reported acquiring in the past two years (Figure 9) bears this out. Digital production printers were the top two most acquired devices in the past

Offset or Digital?

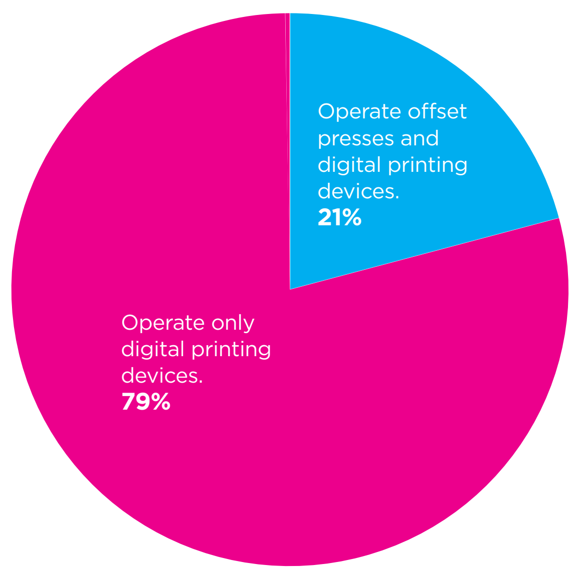

Figure 8
Q: Which describes your in-plant: (Check one only)
N = 112

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two years. Close behind were purchases of roll-fed wide-format printers, which 15% of respondents acquired. This is but one sign of a growing shift toward wide-format printing among in-plants. According to our 2024 "Trends and Services in the In-plant Industry" report, 85% of them provide wide-format printing, and it generates an average of 15% of in-plant revenue.

The fourth most-purchased devices in the past two years are inkjet digital envelope presses, with twice as many respondents adding these than added toner envelope presses. This demonstrates a clear shift toward inkjet for envelope printing.

Top 10 Devices Acquired in Past Two Years

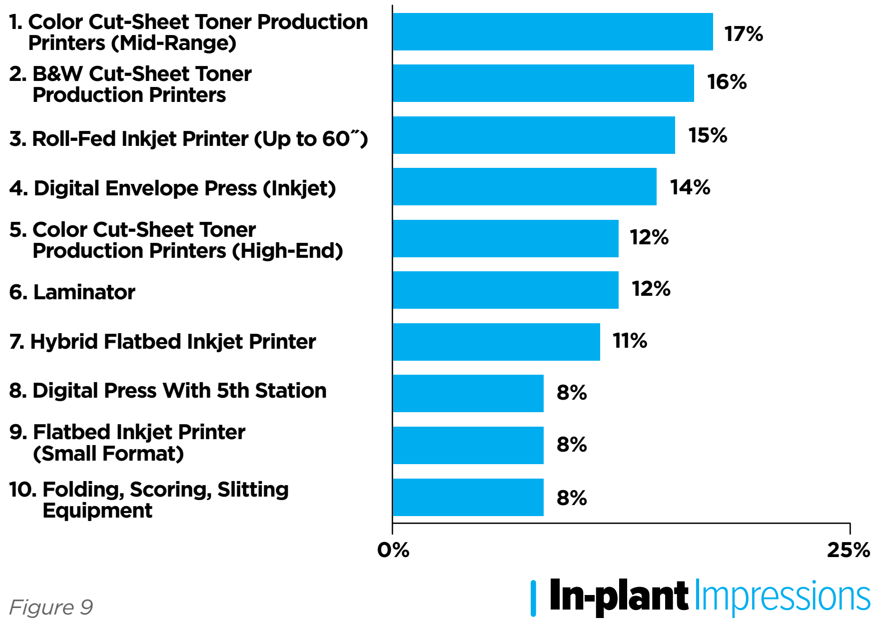

Figure 9

Also notable is the fact that 11% installed a hybrid flatbed wide-format printer and 8% added a flatbed wide-format printer in the past two years, as in-plants mobilized to provide signage and other applications printed directly on rigid substrates. As we'll see in Figure 16, though, interest in adding flatbed printers is expected to drop off slightly in the next two years.

Looking ahead at the equipment in-plants plan to purchase over the next two years (Figure 10), it's no surprise that the top three are monochrome and color production printers. Somewhat more revealing, however, are the next two most popular planned acquisitions: direct-to-film (DTF) printers and digital embellishment equipment. With 10% of respondents planning to invest in each of these, it shows the importance in-plants place on moving beyond traditional applications and providing added value.

Top 10 Planned Purchases

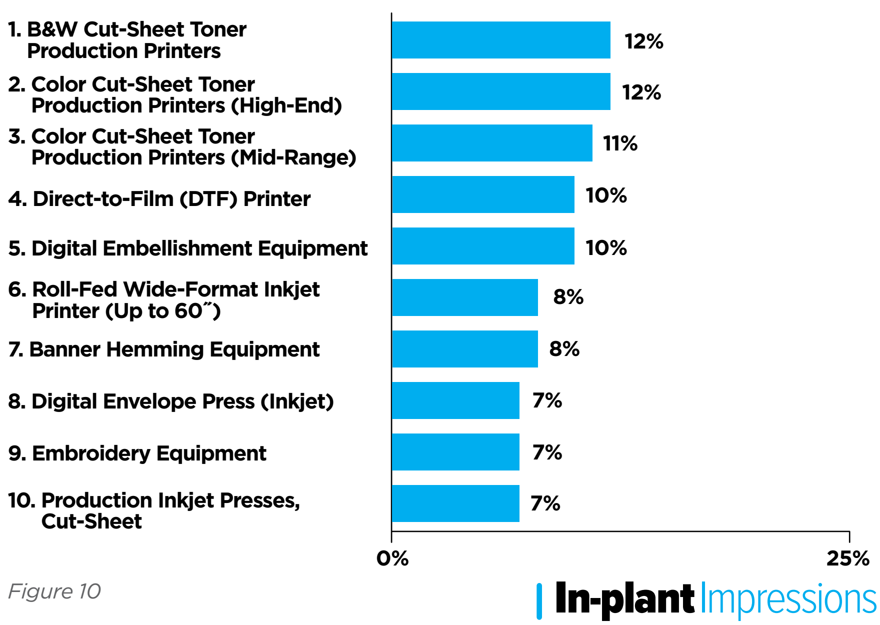

Figure 10

OFFSET ON THE WANE

Though 21% of respondents still maintain offset presses, 37% of those use them only occasionally, leaving 63% that use them often for high-volume printing. While 12% have upgraded their four-color presses over the past two years (Figure 11), and 8% upgraded their one- and two-color presses, none have plans for further upgrades in the next two years.

Offset Presses

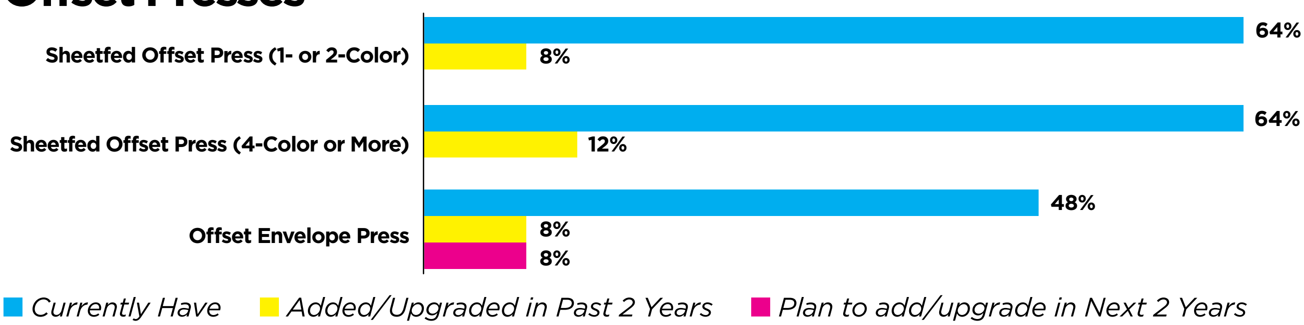

Figure 11
Q: Check if you have this equipment, if you've recently added/upgraded it and if you plan to add/upgrade soon.
N = 25 offset users

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DIGITAL PRINTING

Despite concerns to the contrary, toner printing volumes have increased for nearly half of in-plants (48%) over the past two years. Only 24% report lower volumes, and 28% say their volumes have remained steady (Figure 12). Black-and-white printing volumes have not increased quite as much; 27% say black-and-white work has gone up, while 31% say it has decreased since 2023 (Figure 13).

Toner Printing Volumes

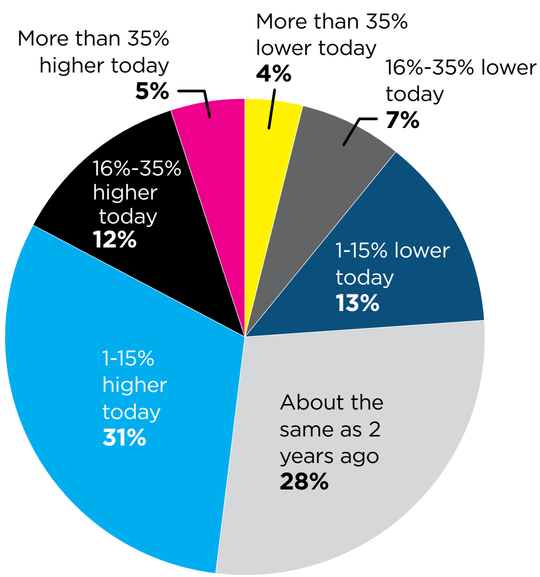

Figure 12
Q: How have your overall toner printing volumes changed compared with 2 years ago?
N = 105

Black-and-White Volumes

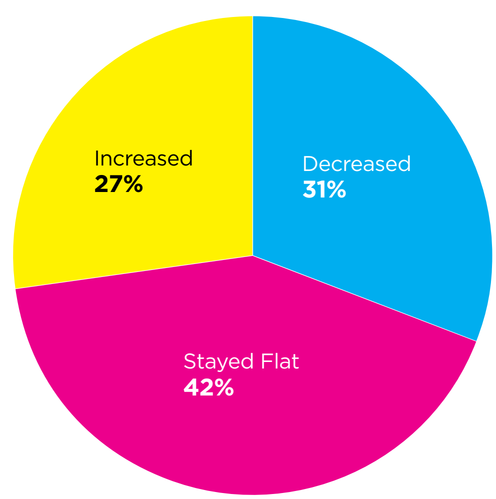

Figure 13
Q: Compared with 2 years ago, how have black-and-white printing volumes changed?
N = 108

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This has not stemmed the need for black-and-white toner printers, however. Three quarters of respondents have them in their shops, 16% have added this equipment in the past two years, and 12% plan to add a monochrome device in the next two years (Figure 14).

While digital toner envelope presses have a higher installed base than inkjet envelope presses, interest in the latter is growing fast, with past and future installation rates exceeding those of toner envelope machines. Cut-sheet production inkjet presses are now in place at 15% of respondents' in-plants, up from 12% in our 2023 survey, and 7% have plans to add an inkjet press in the next two years.

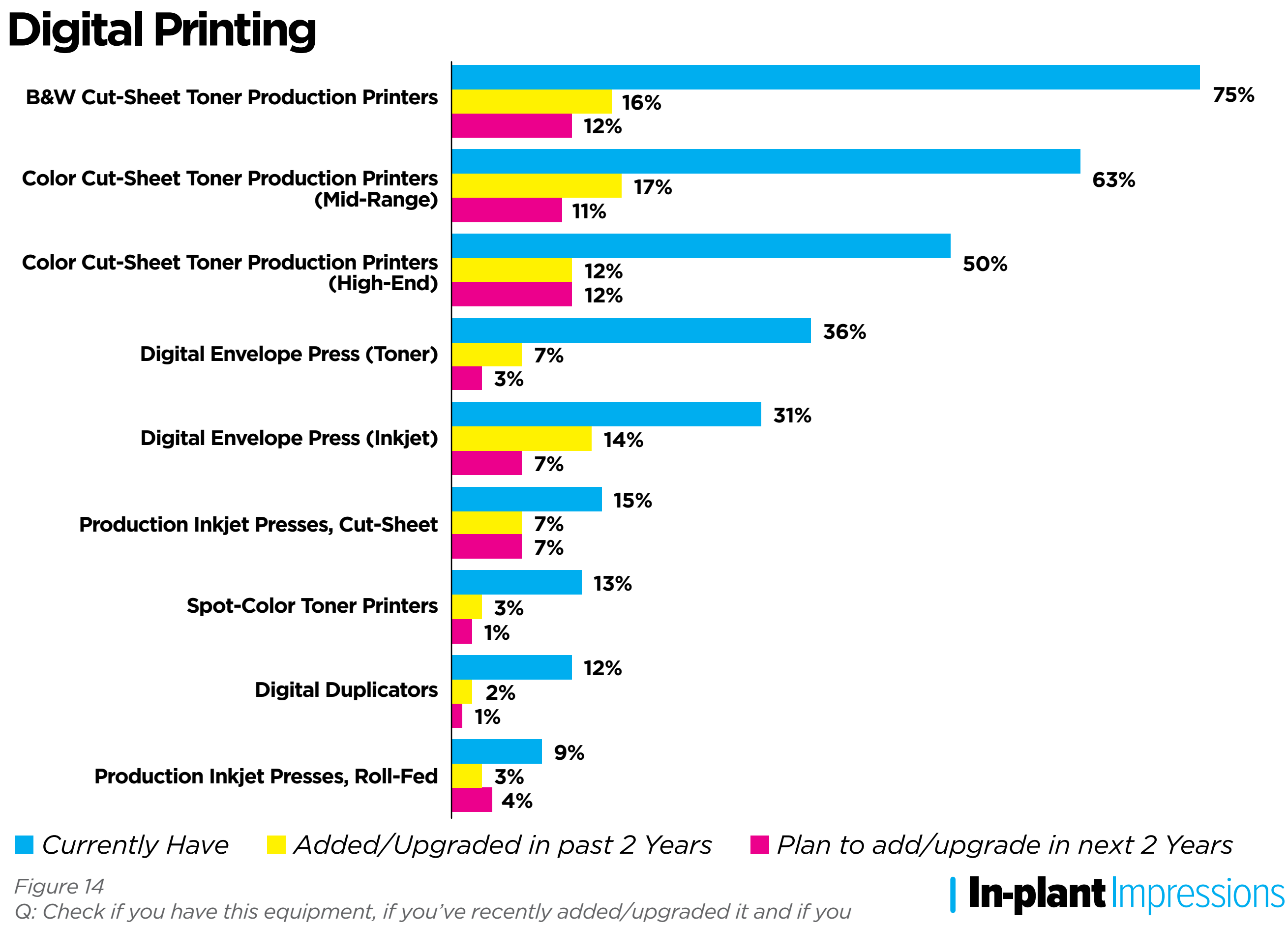

Figure 14
Q: Check if you have this equipment, if you've recently added/upgraded it and if you plan to add/upgrade soon.
N = 107

WIDE-FORMAT

Wide-format printing remains a high-growth service for in-plants, and 86% of in-plant respondents have at least one wide-format printer (Figure 15). Installations of roll-fed equipment were the third most popular investment over the past two years, with 15% adding one (Figure 16). A further 11% invested in hybrid flatbed printers during this period and 8% added a small flatbed.

Those percentages would be higher but 18% say they have no space to fit a flatbed, and 10% are unable to obtain the funding (Figure 17). However, interest in flatbeds is clearly strong in the in-plant community, and 40% of those with wide-format printers now have a flatbed or hybrid flatbed. What's more, 31% report that their flatbed has brought new business to their shop.

Complementing wide-format printers (Figure 18) are devices like laminators (in use by 61%), contour cutters (used by 29%), automated flatbed cutters (used by 17%), and banner hemming equipment (used by 17%). Flatbed and roll-fed contour cutters are gaining popularity at in-plants, with 5% of respondents planning to add this equipment in the coming years.

Though embellishment of printed material is gaining traction elsewhere in the printing industry, among in-plants it does not seem as popular; only 13% have dedicated digital embellishment equipment for foiling, embossing, UV printing, etc. Most embellishment is done inline on digital presses that include a fifth station (27%) to print embellishments. But there is significant growth potential given that 10% of respondents plan to add digital embellishment equipment over the next two years.

How Many Wide-Format Printers?

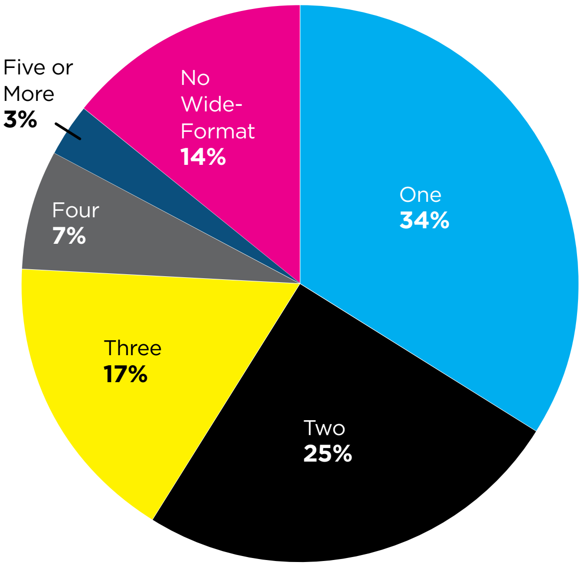

Figure 15
Q: How many wide-format inkjet printers does your in-plant have?
N = 107

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Wide-Format Installations

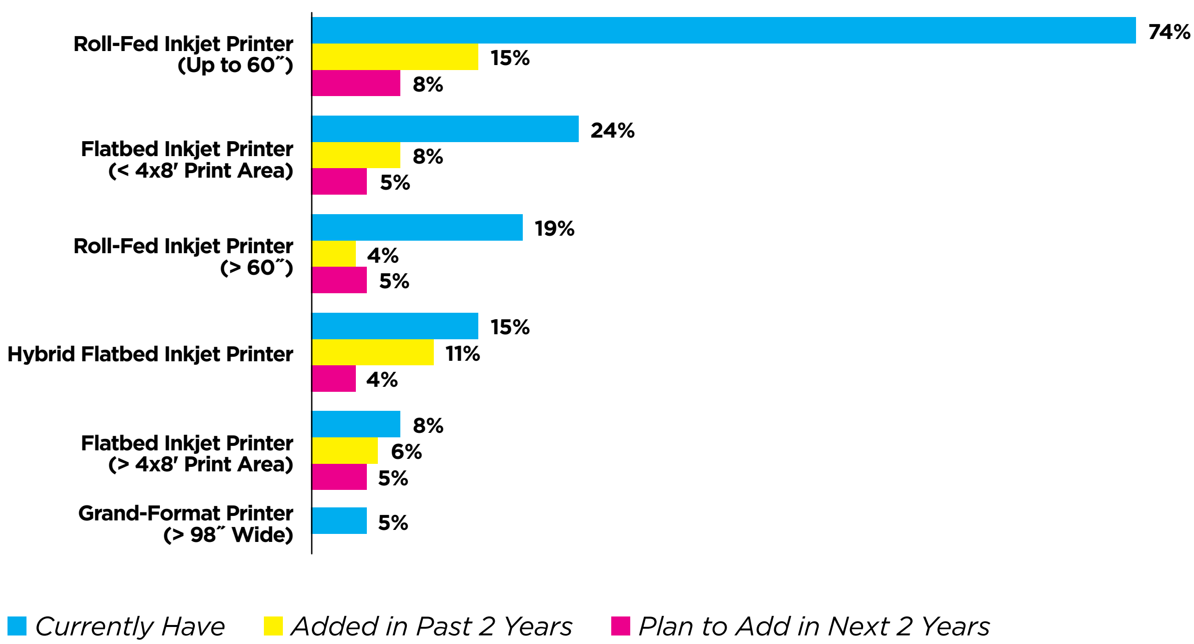

Figure 16
Q: Check if you have this wide-format equipment, if you've recently added/upgraded it and if you plan to add/upgrade soon.
N = 85 Wide-Format Users

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Flatbed Printer Status

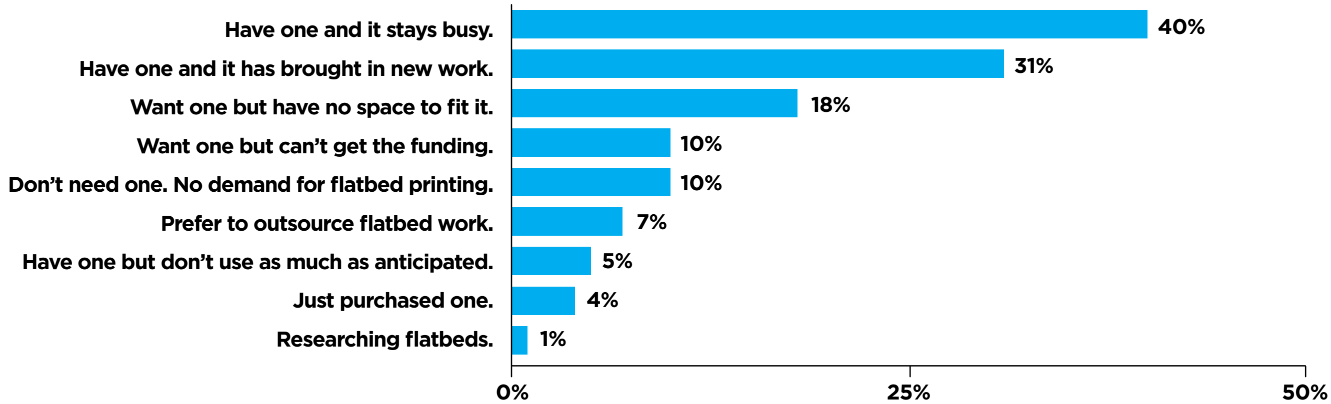

Figure 17
Q: What is the status of flatbed/hybrid wide-format printers at your in-plant? (Check all that apply)
N = 83 wide-format users

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Specialty Devices

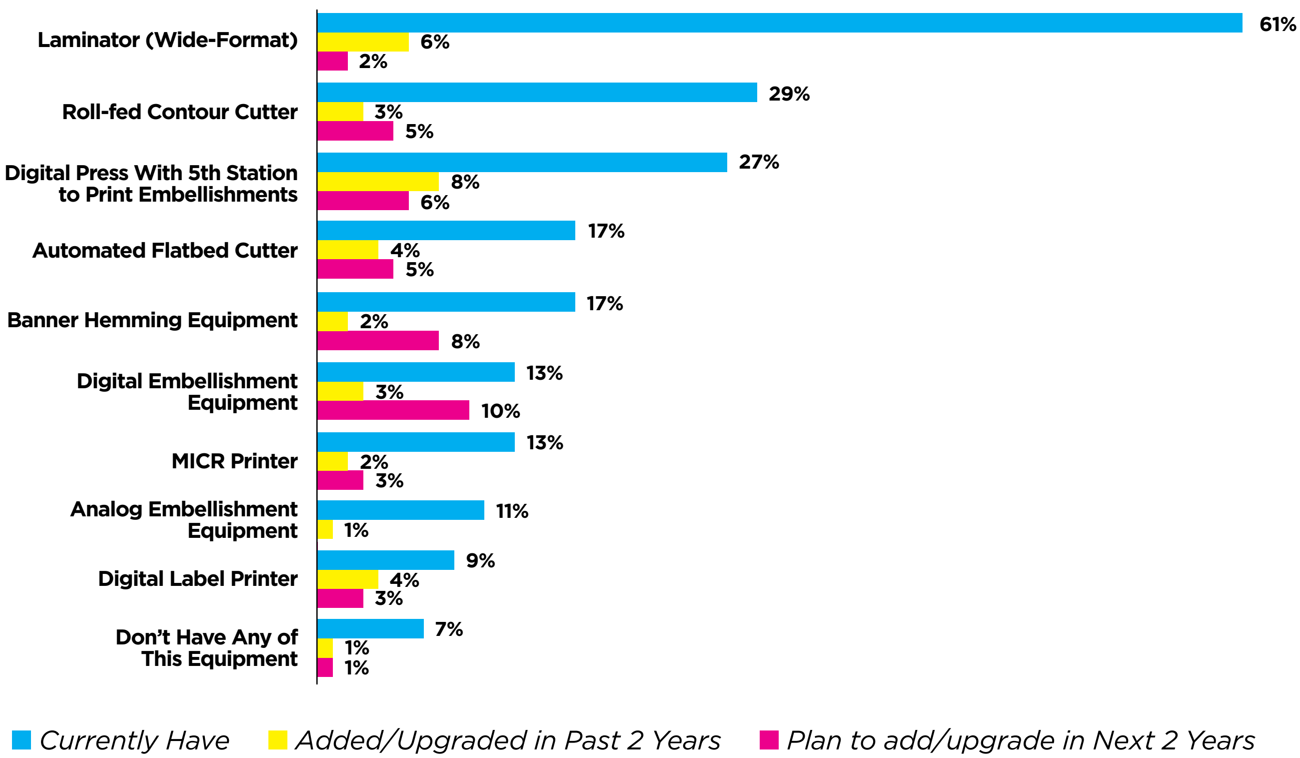

Figure 18
Q: Check if you have these specialty devices, if you've recently added/upgraded them and if you plan to add/upgrade soon.
N = 102

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APPAREL

One of the newest service frontiers for in-plants is garment decoration, and many are investigating this application. Already, 33% of respondents have this equipment. The most popular related piece of equipment is a heat press, which 21% of respondents utilize (Figure 19). The fact that just 4% also have DTF equipment implies that many are purchasing transfers and heat pressing them onto apparel. Notably, DTF printers are on the shopping list of 10% of respondents, while another 7% plan to invest in embroidery equipment.

BINDERY & FINISHING

Bindery acquisitions continue to be crucial for in-plants, with folding and scoring equipment leading the way in recent purchases (Figure 20). Over the next two years, 5% plan to add collators, while 4% are looking to install cutters, stitchers, and slitters.

Apparel Decoration

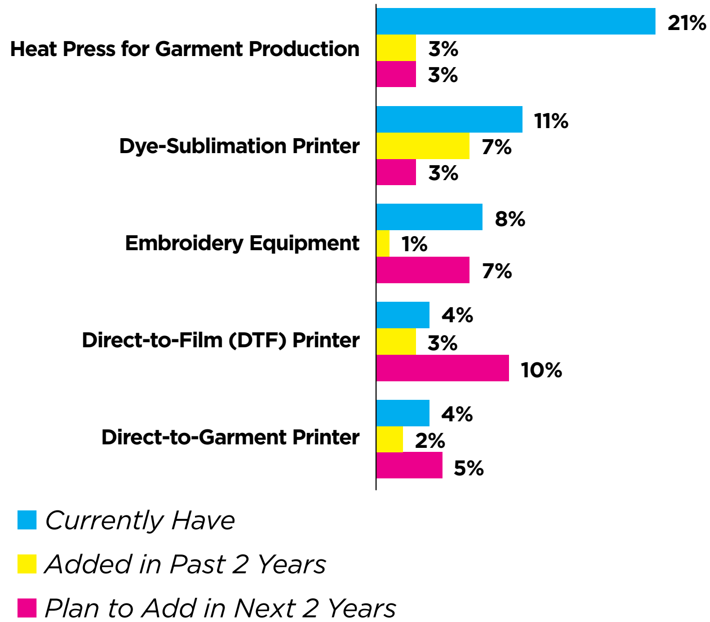

Figure 19
Check if you have this apparel decorating equipment, if you've recently added it and if you plan to add/upgrade soon.
N = 91

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While just 55% of respondents told us in the survey that they have addressing and mailing equipment, mail is a crucial service for in-plants to offer. Over the past two years, investments in inserters and postage meters far exceeded other postal equipment purchases, and in-plants plan to continue prioritizing both of these over the next two years (Figure 21).

Bindery Equipment

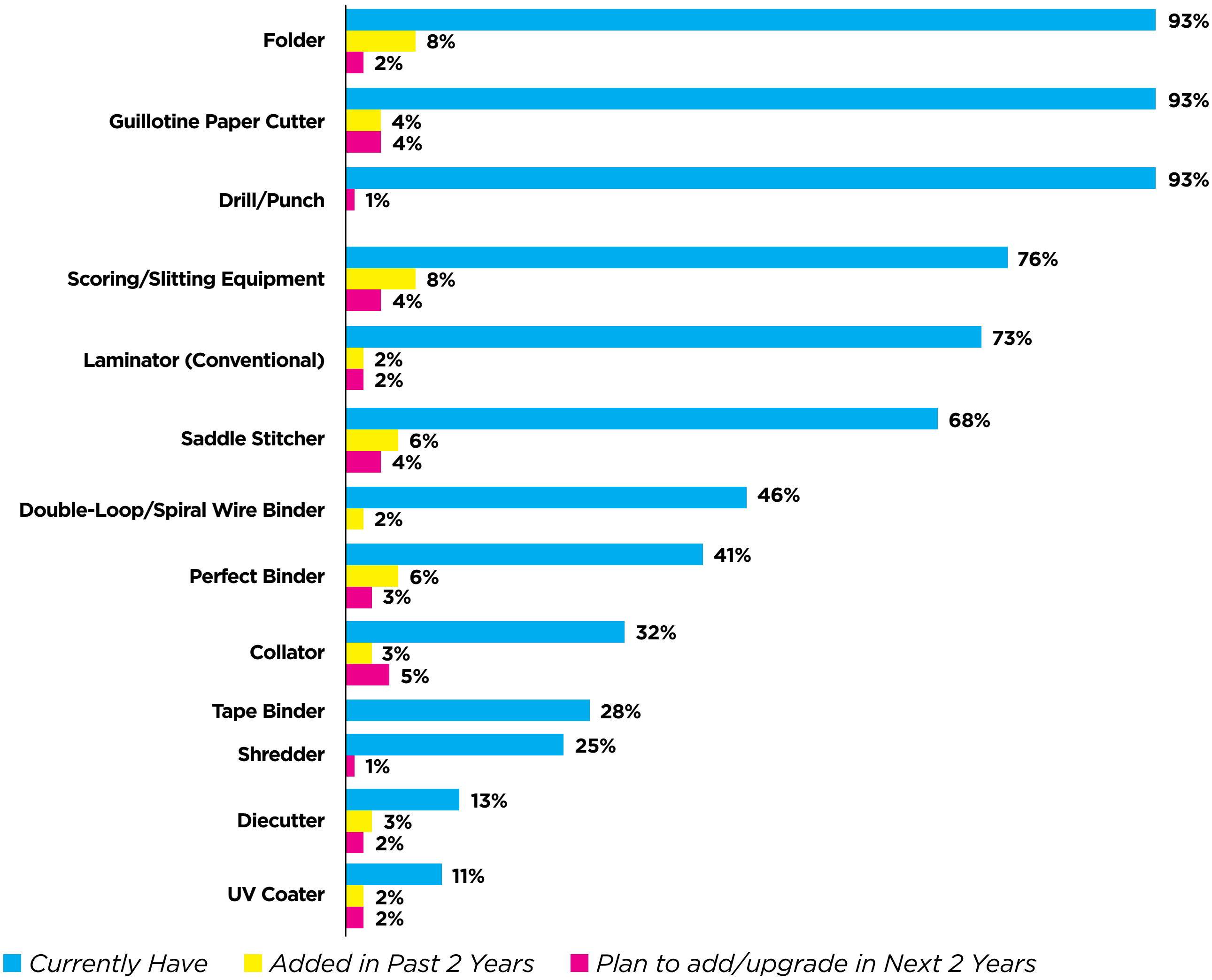

Figure 20
Q: Which OFFLINE bindery equipment does your in-plant use, have you recently upgraded it and do you plan to?
N = 99

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Mailing Equipment

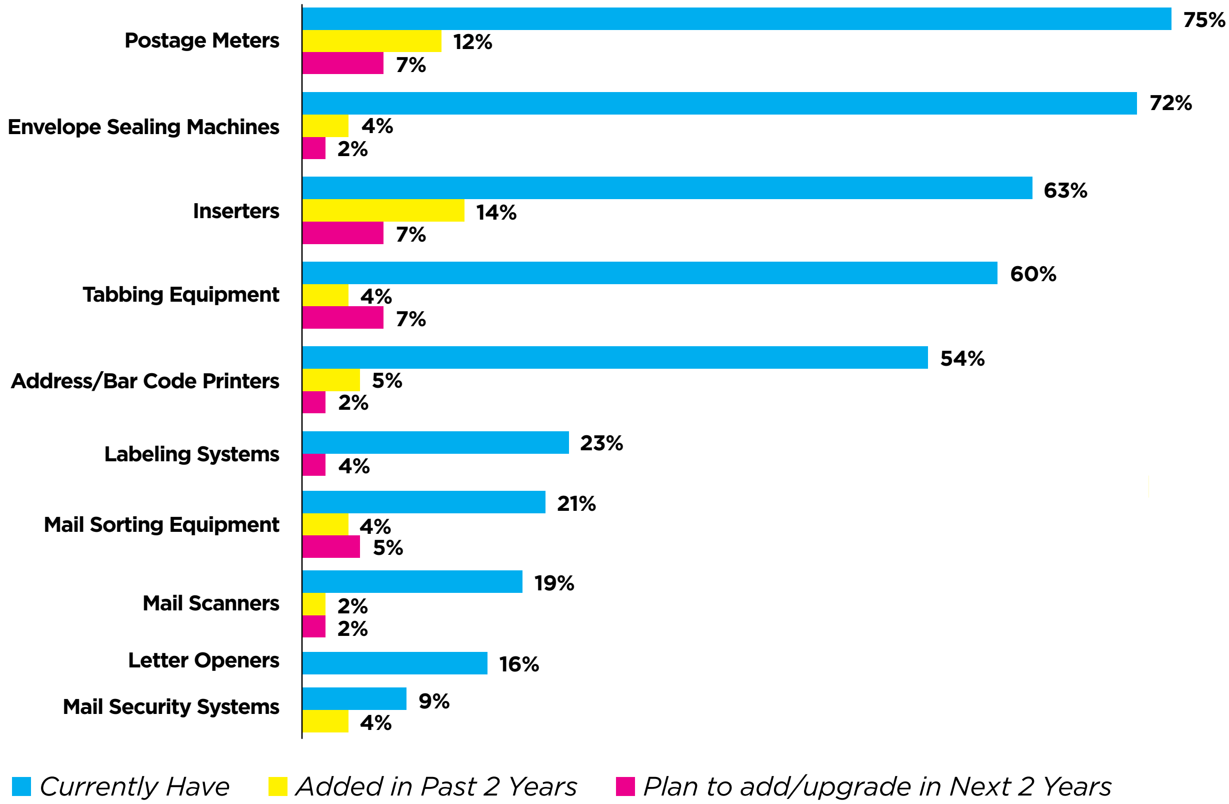

Figure 21
Which Addressing & Mailing equipment do you have, have you recently upgraded it and do you plan to?
N = 57 Mail Equipment Users

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CONCLUSION

In-plant operations are prioritizing strategic equipment investments to enhance efficiency, expand service offerings, and remain competitive. Digital printing continues to dominate, with increased adoption of toner-based and inkjet production presses, while offset printing steadily declines. Wide-format printing remains a growth area, with strong investments in hybrid and flatbed printers.

Automation is becoming a key motivator for new equipment purchases, addressing labor shortages and improving productivity. Additionally, in-plants are diversifying into new markets, such as apparel printing, to provide added value. The importance of trade shows and peer recommendations is increasing as in-plants are looking to see equipment in action and get first hand reviews. These trends indicate a shift from merely maintaining operations to strategic expansion and modernization.

WHO WE ARE

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.

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