

The Year in In-plant News

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Editor



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Since Last We Met...

- Economy went sour
 - Budgets have shrunk
 - Outsourcing up?
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Commercial Printers that Closed

- Cenvéo/Cadmus Communications
Easton, MD
 - Southwestern ColorGraphics,
Keene, TX
 - Taylor/Corporate Graphics,
Austin, MN
 - National Hirschfeld, Denver
 - Vertis Communications
Maryland, Texas, Ohio, Ala.
 - Belo/DFW Printing,
Arlington, TX
 - Capital Printing, Schenectady, NY
 - Grafikom, Toronto
 - Leading Media Print Group,
Forest Grove, OR
 - IWCO Direct, Elm City, NC
 - Deluxe Corp. facilities in
Greensboro, NC; North
Wales, PA; Thorofare, NJ
 - Synergy Web Graphics,
Mazomanie, WI
 - Koke Printing in Eugene, OR
 - Spencer Press, Wells, ME
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New In-plants

- Folsom Lake College



- Cattaraugus-Allegany-Erie-Wyoming Board of Cooperative Educational Services (CABOCES)



- Toll Brothers



Offset Installations

- **Church of Scientology:** five-color Heidelberg XL 105
 - **Wal-Mart:** six-color 56" KBA Rapida 142
 - **Aflac:** 10-color Heidelberg XL 105
 - **Allstate:** six-color 40" Komori
 - **Millersville University:** five-color 26" Adast
 - **Simon Fraser University:** five-color Heidelberg 52
 - **Miami-Dade County:** four-color Heidelberg
 - **Carleton University:** four-color 29" Heidelberg
 - **University of Texas Medical Branch:** Presstek 34DI
 - **Columbus State University:** Presstek 34DI
 - **University of Iowa:** four-color 29" Komori
 - **State of Oklahoma:** four-color Ryobi
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Xerox iGen Installations

- Western & Southern Financial Group (iGen4)
- University of Delaware (iGen4)
- Unum Group
- CABOCES



Kodak NexPress Installations

- U.S. Special Operations Command
- University of Miami
- University of California-Riverside
- Briggs & Stratton
- University of Arkansas
- University of Oklahoma



HP Indigo Installations

- UC-Davis
- Texas Tech University
- University of Mississippi Medical Center



InfoTrends Report

- Number of U.S. in-plants: 52,078
- In-plant data centers: 4,299
- In-plant print shops: 9,711
- Small in-plant copy shops: 38,067
- Decline in the number of in-plants of around 2.5% from 2006 to 2007
- Integrated with data centers: 16.2%

InfoTrends Report

Since 2004...

- Digital color printing rose 36.5 percent
- 86 percent of in-plants now offer it
- Black-and-white digital printing rose from 71% (in 2004) to 85%
- 70.6% of color volume now produced on digital devices, vs. 47% in 2004

InfoTrends/IPG Survey

Services Offered by In-plants and Print-for-pay Operations

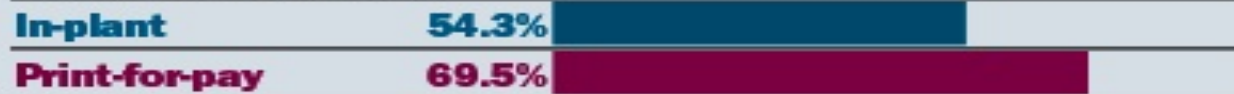
HIGH-SPEED BLACK-AND-WHITE PRINTING



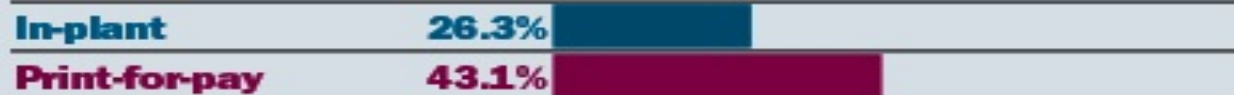
DIGITAL COLOR PRINTING



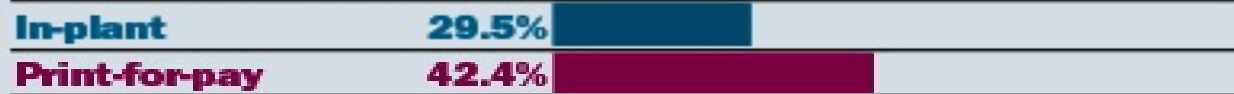
VARIABLE DATA PRINTING



DIRECT MARKETING CAMPAIGN MANAGEMENT



DIGITAL ASSET MANAGEMENT

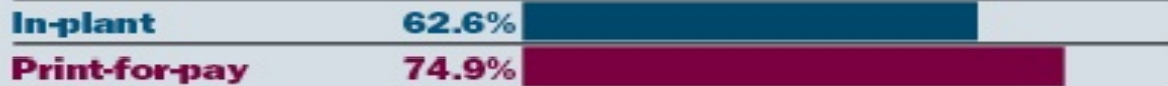


InfoTrends/IPG Survey

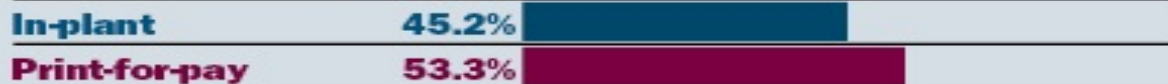
FIGURE 2:

Comparative Data for In-plants and Print-for-pay Operations

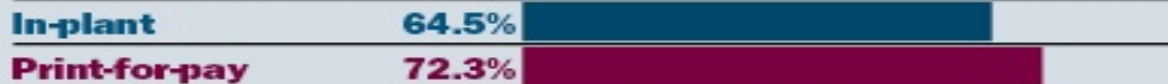
PROVIDE MAILING SERVICES



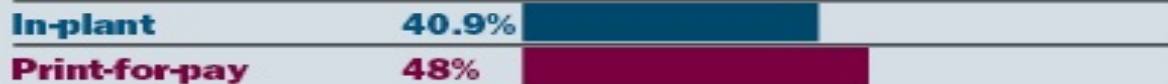
VARIABLE INSERTION CAPABILITY



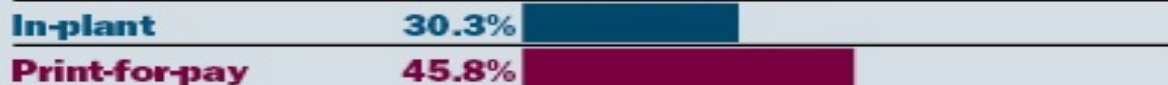
INK-JET ADDRESSING CAPABILITY



FAMILIARITY WITH TRANSPROMO



POSITIONED AS A MARKETING SERVICES PROVIDER



In-plant Conferences



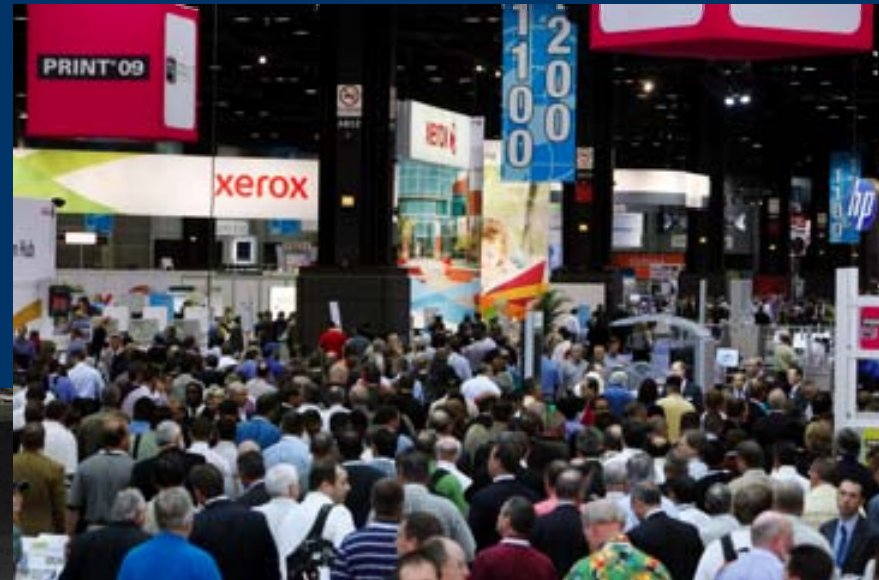
- NGPA 2008: Belleview

In-plant Conferences

- ACUP...Cancelled
- On Demand
- IPMA
- TransPromo Summit
- Interquest
- SUPDMC
- TACUP



PRINT 09



In-plants in the National News

- New York Times “outs”
Senate's in-plant
 - Ohio University in-plant
manager indicted
 - Oregon introduces bill
to ban insourcing
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What's Happened Since...



- Continues to centralize
- Executive order

What's Happened Since...



- Upgraded Océ ColorStream 10000 capabilities
- Upgraded NexPress 2500 to a 3000
- Replaced NexPress 2100 with a 3000
- Dimensional toner
- Color management
- RFP for 100% post consumer recycled

What's Happened Since...



- 4 In-Print Silver/Bronze awards
- 1 Gold and 2 Silver Addy Awards
- Continue to look for another 5-6 color press

What's Happening Now...



City of Baltimore

- 30 employees, 2 shifts
- \$3 million
- Data center printing
- Document scanning
- Shredding
- Forms management
- Braille printing

Thanks

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