

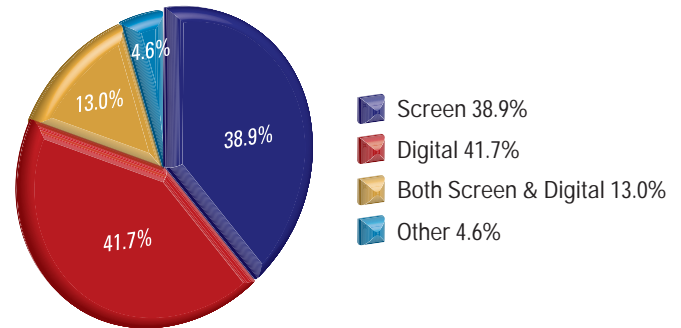
## Business Growth Plans Survey

Summary Report – May 2006

### Screen and Digital are Neck and Neck

Digital press purchases inched past screen press purchases in the past 12 months, at 41.7 percent to 38.9 percent, respectively. But expect digital to have a tremendous growth spurt in the next 12 months, as it outpaces screen at 53.8 percent to the latter's 21.7 percent of planned buys. The number of companies choosing to expand their offerings with both processes will also increase: 13 percent of respondents went for both screen and digital equipment in the past 12 months; an additional 5.9 percent will jump on the bandwagon in the next 12 months, for a total of 18.9 percent of respondents using or planning multi-technology imaging solutions in the near future.

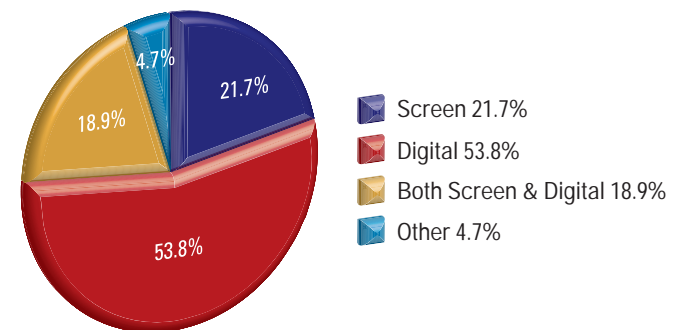
Printing Equipment Purchased in the Past 12 Months



### Roll-to-Roll is Moving Up

While digital flatbed purchases remain solid across the industry — 35.6 percent of companies purchased this type of output device in the past 12 months — 71.2 percent of respondents report purchasing a roll-to-roll inkjet within the same time period, making roll-to-roll twice as popular a buy as a flatbed.

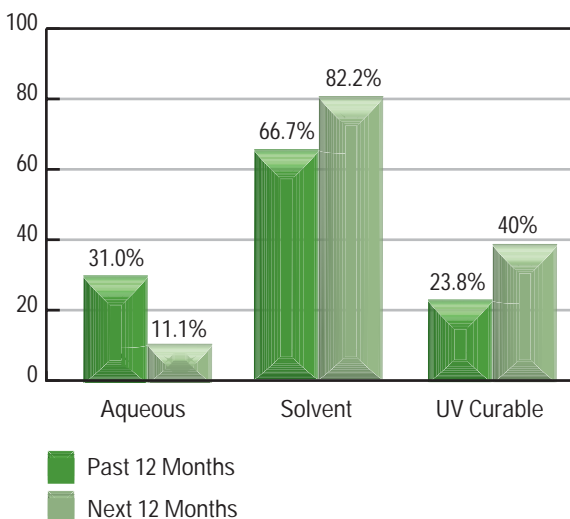
Printing Equipment Purchases Planned for the Next 12 Months



### Solvent Ink Plans Increasing

The type of roll-to-roll companies are looking into is also shifting. In the past 12 months, 31.0 percent of respondents opted for an aqueous system, 66.7 percent chose solvent, and 23.8 percent selected UV curable. But the number of buyers planning to invest in aqueous in the next 12 months dropped to 11.1 percent, while solvent purchase plans increased to 82.2 percent, and UV curable to 40 percent.

Roll-to-Roll Inkjet Purchases



### Sales by Imaging Technology

In 2005, screen printed products account for 64.6 percent of company sales, on average. The average percent of company sales generated from digitally printed products is 49.7 percent, and the average sales generation for pad printed products is 15.8 percent of company sales.

### Screen Printing Strong in Both Garment & Graphics

Which screen printing equipment did your company purchase in the past 12 months? 46.4 percent of respondents bought garment decorating equipment and 60.7 percent of respondents bought graphics equipment.

### Top Specialties: Banners, POP, Garments

When asked to identify their top three product specialties, 28.7 percent of respondents listed vinyl banners among their principal offerings; 27 percent listed point-of-purchase in the upper three, and 24.6 percent reported that garments are part of their leading trio. Coming in at a close fourth, pressure-sensitive decals are a top specialty for 23.4 percent of respondents.