

Printers Report Strong Shift to Digital

Printers Split on Closing Down Their Offset Press Departments

By John Stewart

“Is offset printing alive & well, or is it in intensive care” is a question we posed in a recent industry survey conducted Aug. 18-24, 2016. Well, the answers and comments we received were mixed, and while printers are not ready to “pull the plug,” many recognize the patient is not doing too well and probably will not walk out of the hospital!

Our 15-question survey was more detailed than many we have conducted recently, but it still received the third highest rate of response out of nine surveys we’ve conducted this year. More than 220 printers responded within the four-day window we allowed for responses.

Interestingly enough, the profile of our respondents for this survey closely matches the general profile for the industry at large, based upon data we have acquired during the past 4-8 years.

As an example, the annual projected sales for 2016 closely matches the data we have received from other recent surveys we’ve conducted.

Average and Median Industry Sales

	Our Survey	Recent Digital Survey	Op. Ratio Study
Average Sales.....	\$1,180,538	\$1,220,186	\$1,132,253
Median Sales.....	\$700,000	\$746,000	\$760,297

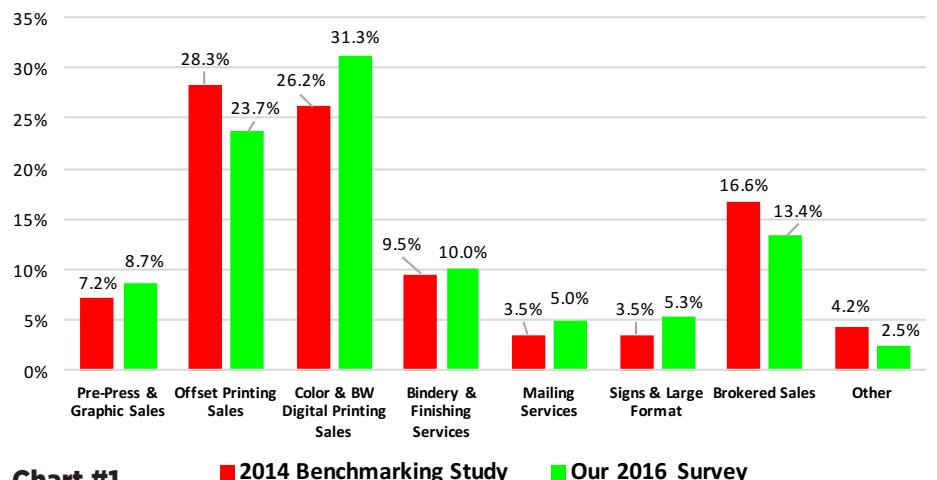
Equally interesting, if not more so, is the breakdown of sales ratios by departments for our current survey database compared to the data revealed in the **2014-15 Financial Benchmarking Study** published by QP Consulting, Inc. and NPOA. See our graph below:

Analysis of Sales Trends

Although we are technically dealing with two different sets of respondents, we believe there is a high degree of overlap and cross-over between the two groups of participants,

continued on next page

Sales Category Breakdowns 2013 vs. 2016



with many having participated in both surveys.

With that being said, note the fairly significant 4.6% drop in “Offset Printing” between 2014 and 2016. Note too, the significant 5.1% increase in “Digital Printing Sales” (Color and B&W Digital Printing) for this same period of time. What this really represents is an overall dramatic shift in production methods of almost 10%.

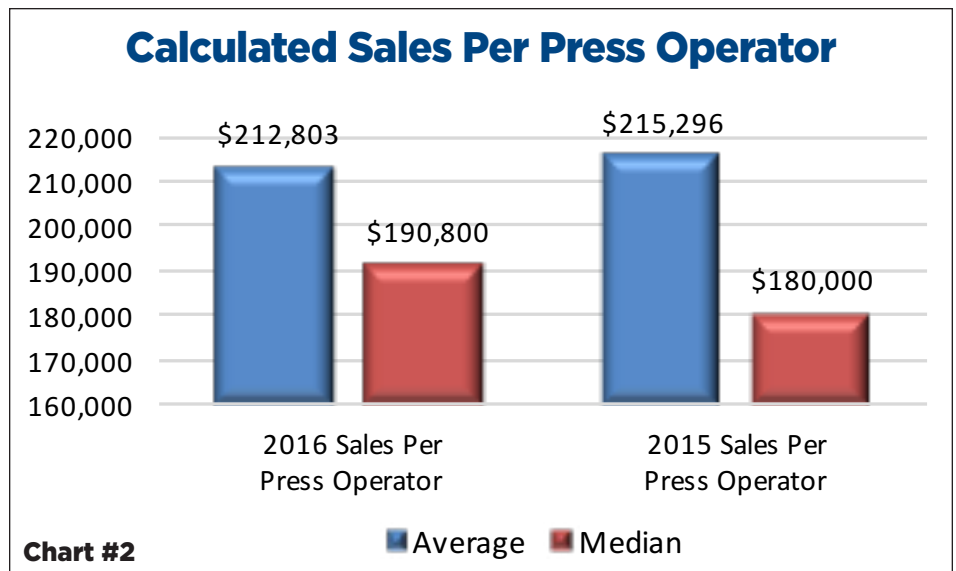
Other changes worth noting, but far less dramatic, is the 1.5% increase in “Mailing Sales,” a 1.8% increase in “Signs & Large Format” and a 3.2% drop in “Brokered Sales.”

Sales Per Press Operator

Although it was not our immediate intention to get too detailed when it came down to extracting production data, we were fortunate enough to ask enough questions to allow us to compute the estimated average and median sales per press operator. This was calculated by applying the percent of sales attributed to offset printing to the projected total sales for 2016. We then took that number and divided by the average and median number of press operators provided by our survey participants. That data is depicted above.

As you can see, there has been a negligible drop in the average sales per press operator but a slight increase in sales per press operator when we look at the median. We’re not sure what to conclude from these numbers, other than to note that this ratio is easily calculated in most shops, and we encourage readers to do so. We have, however, demonstrated in numerous articles in the past that sales per press operator levels of \$300,000 or greater are quite achievable, but we will have to put that discussion off to another day.

Reading the data we did receive, as well as in between the lines, it



is apparent to us that many firms are keeping FT and PT press operators on their payrolls, despite the diminished workloads in these departments. Yes, some employers are retraining these individuals, but others seem willing to accept lower levels of productivity as the price they will pay to have a press operator on call when they need one.

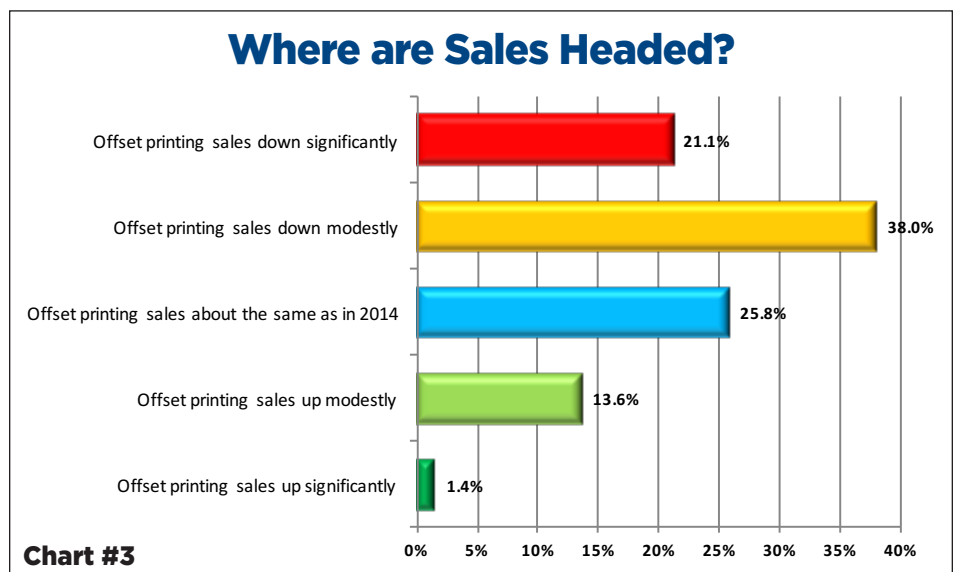
Defining Where Offset Printing Sales Are Headed

One of our early questions we asked participants was where their current “offset” sales stood as compared to two years ago. The graph below depicts their answers.

Once we asked participants about the direction of their sales, we then asked them to tell us by what percent they estimated their sales were up or down. Analyzing the entire database, participants estimated that their average offset sales were down -10.3%. The estimated median was -5.0%.

However, as you can see from the graph below, when we broke the groups on page 3 into the four groups reporting changes, the data is very interesting:

Only three firms reported that “sales were up significantly.” The average for the increase in sales was 24%,



If Sales Have Changed, by What Percent?

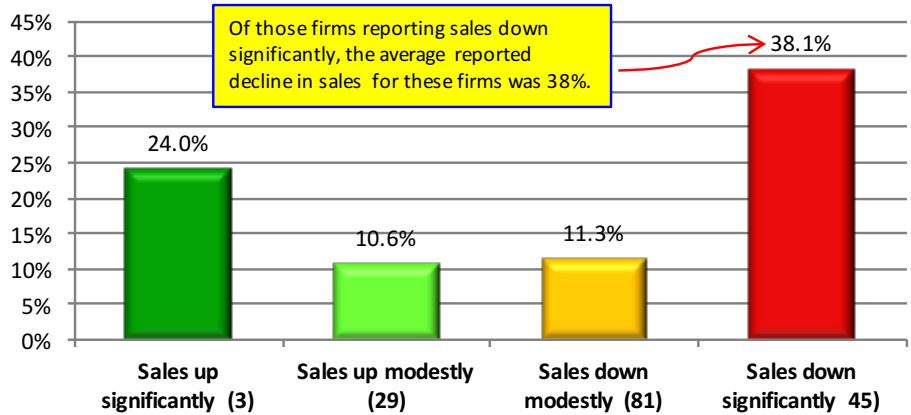


Chart #4

quite dramatic, but a very small sampling. On the other hand, 45 firms told us their sales were down dramatically, an average of 38.1%! The total average decline in sales reported by all participants was -20.9%.

Average Number Of Press Operators Employed?

According to our survey results, the average participating firm reported employing 1.4 press operators. The median was 1.0. That calculation excludes 31 firms that reported they no longer employed any press operators. Had their data been included, the average would have been slightly lower at 1.18 but the median remained the same at 1.0.

We then asked two follow-up questions regarding press operators. First, we asked how many press operators did they expect to have on board two years from now, and the responses were almost identical – Average at 1.19 and median at 1.0. Only when we asked them to project out to the year 2020 did we get a noticeable difference. In 2020 our respondents told us they expect to be employing slightly less than one FT press operator, at 0.93. The median dropped to .5 press operators.

Will Owners Terminate Any Press Operators?

There seems little doubt that while offset printing will hang around for the near term, the prospects for press operators in the longer term is not very promising. Interestingly enough, however, we asked two questions related to terminations of press operators in the past 12-18 months, as well as asking owners if they anticipated terminating one or more press operators in the next 12 to 18 months. As you can see from the bar graph below, very few owners have terminated any press operators in the past 12-18 months, and an even slightly larger percent

told us they had no plans whatsoever to terminate in the next 12-18 months.

Plans For Terminating Any Press Operators?

We offered participants who have terminated press operators in the past 12-18 months or who said they were considering such terminations in the near future to offer their comments. We are providing a few of their comments below. The remainder of the comments appear in the Appendix following this column.

- 3 years ago press operator walked out and then we sold all of our heavy iron.
- As of July 1, 2015 we completely shut down our offset section, and converted it completely to digital. The 2 offset operators I currently have are now digital press operators.
- We've already dropped from 1.75 to 1
- Full time press operator retired 12 months ago
- I - the owner - have been running the press on weekends, for the last five years. I am now brokering out those few items, like envelopes, that need offset.

Terminating Press Operators - Past and Future?

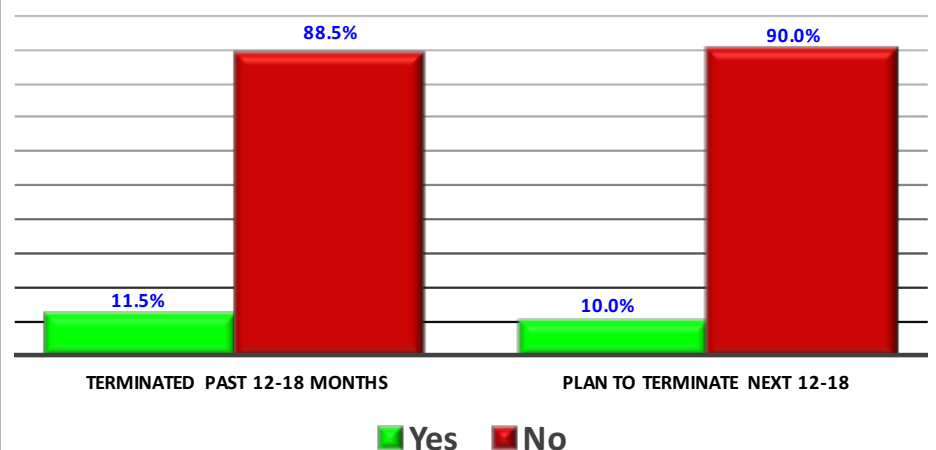


Chart #5

- *I actually have sold my presses to a nearby printer and job my presswork to him. I'm actually all digital in-house now and increasing in digital capability. The presswork that I have to do now is critical PMS color that can't be done in cmyk and very long or oversized runs.*
- *I had a full-time press operator (and other duties) resign and I will not replace*
- *I terminated my press worker in 2007 and shut down my offset press department then.*
- *No offset presses - only digital printers*

Where is the Work Going?

In light of what respondents told us in our previous questions, we then asked them, as best they could, to describe their current operations as well as how and where work is being processed in their company.

Firms with busy offset printing departments should consider themselves very fortunate as well as almost an outlier in the industry. Between the 16% of respondents who told us they no longer employ a press operator and the almost 24% who told us that their press department has experienced a significant drop in work, this certainly does not bode well for the future of offset.

From the data we gather in this survey, there is little doubt that there is almost a “chain reaction” going on in the industry with more and more devices that can replace 70-80% of all the work that only a few years ago was being produced on offset duplicators.

We asked participants if they thought they might be assigning even more work to digital devices in the next 12-18 months – 75.2% said they would be transferring more work to that department in the next 12-18 months.

When we asked survey participants if they had given serious thought to totally eliminating in-house offset printing completely and brokering out work that could not be produced internally, 47.6% of respondents said “Yes” they are considering such a move.

Eliminating the Press Department Completely?

We allowed participants to enter comments regarding eliminating this department. Many of them simply commented that they had made the change months or even years ago. Some of the participant comments are provided below.

- *3 or 4 years ago we had a 2c Itek 3985 that was near the end of it's life. At that point we considered brokering all our color work to*

Considering Eliminating Offset Department Completely?

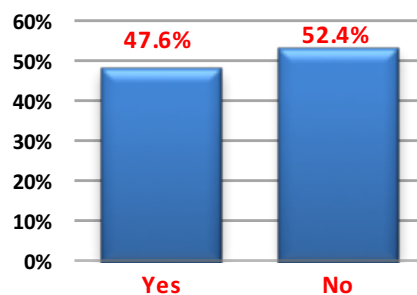


Chart #6

larger shops. We were instead able to acquire a Ryobi DI which has saved this department. Because the DI has much more capacity, we are looking further outside of our geographic area for more work and are beginning to have some success. Offset still has it's place, but the competition is disappearing rapidly so there's more work for those of us that remain.

- *50% of our volume is basic black & white, will continue to employ offset for this product.*
- *Considering the rural location and lacking a suitable partner to broker to, makes this unlikely.*
- *Eliminating because of labor, maintenance, and environmental compliance issues. We are adding faster and more capable digital equipment. A small amount will shift to outside providers where digital cannot do the job - some Pantone colors, etc.*
- *I will still keep my press. I can run it if needed.*

You will find additional comments regarding the elimination of the press department in the Appendix following this report.

Shifting Offset to Digital - The Trends

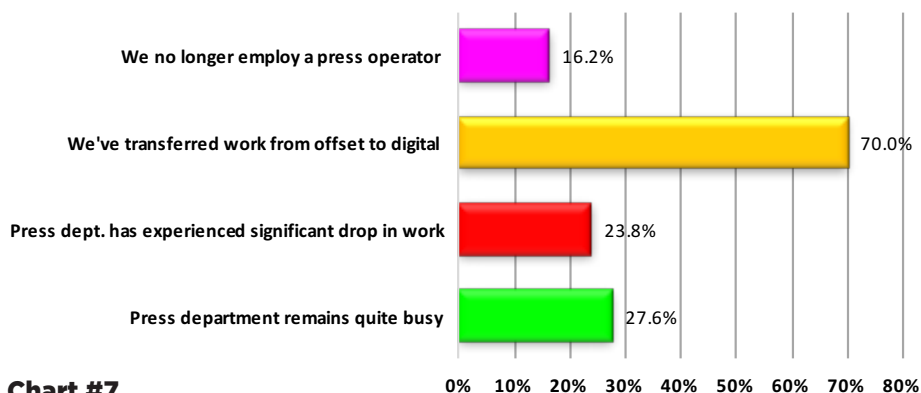


Chart #7

Digital Envelope Printers

We asked owners if they currently owned a digital or inkjet device capable of producing envelopes. According to our survey, approximately 55% of respondents told us they currently own such a device. The remaining 45% told us they did not, so we then asked them about their plans for the future in this area. The accompanying graph provides their answers.

We encouraged participants to enter their comments regarding their current and future plans and below are some of their comments:

- *Have a Memjet and it really sucks. Would not recommend it to anyone.*
- *We already own an iJet.*
- *Own a IntoPrint (Okidata based) we've worn it out since 2009.*
- *We own an memjet.*
- *Own an Okidata ProColor C910.*
- *Our digital color machine has envelope capabilities, but used only for short runs and variable only.*

For additional comments on this topic, please turn to the Appendix where we have provided 90-95% of all the comments provided for various questions used in our survey.

Distribution of Presses By Types and Sizes

Our last survey question was asked just to get a feel as to the distribution of various types and sizes of presses among our survey group. The accompanying graph represents the percent distribution of 464 presses by type and size.

Conclusions & Comments

So, what did we learn from this survey? I can only offer you my own thoughts and commentary and, as always, I welcome yours in return.

Future Plans Regarding Envelope Printers

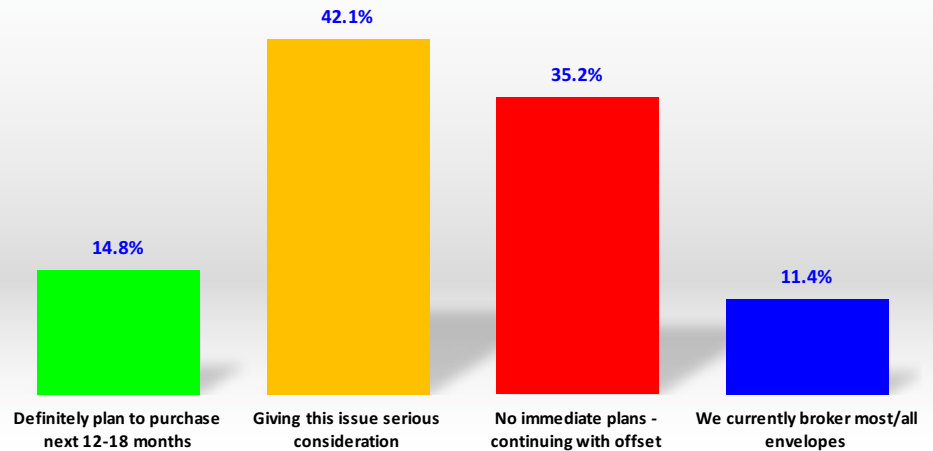


Chart #7

- First, as frustrating as it is dealing with press operators, I can't imagine being in the position of being a dealer in this industry and having to market and sell offset presses in today's market. Imagine having to sell what we used to call "old iron" in the printing industry in 2016. It is hard to imagine or justify purchasing a new press in this era of the digital device!
- Second, although there is still a fair amount of trepidation in the industry among owners regarding the closing down of this department completely, many other owners tell us that did it two, three and even five years ago and have never looked back. Some say

their only regret was that they didn't do it sooner. These types of comments are reminiscent of the comments we used to hear from folks who held-out on converting to computerized estimating systems, but when they did make the move, told us their biggest regret was that they had not done it sooner.

- Based upon the data provided for this survey, offset printing sales as a percent of total sales continues to experience a relatively dramatic decline – a 4.6% decline in just the past two years, and a decline of almost 12% in the past seven years. The loss in offset sales has been more than offset

Number of Presses by Type

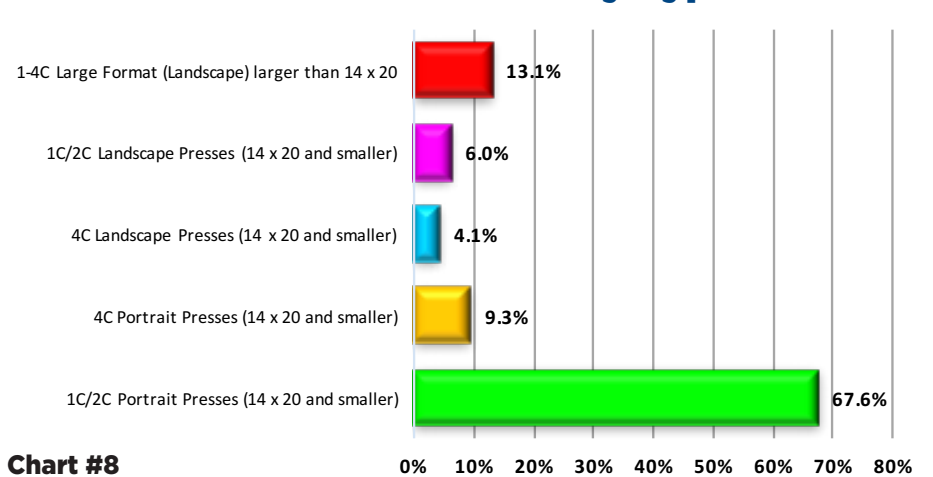


Chart #8

by an increase in digital production in most firms.

- For many firms we surveyed, they are already using 3rd and even 4th generation digital devices. For others, however, those holding off on either their first move to digital or a belated upgrade from an older digital devices to a newer one we say, *“It is time to move on and bite the bullet,”* and make those necessary investments, or be left by the wayside by your competitors.
- Too many owners who acknowledge that their printing sales have dropped dramatically still seem reluctant to terminate one or more press operators. When they continue to retain press operators that are no longer necessary, their average Sales Per Press Operator (total offset printing sales divided by number of FT equivalent press operators producing these sales) ends up being extremely low, thus affecting overall productivity and profitability.
- Instead of achieving easily attainable Sales Per Press Operator levels of \$300-350,000 or more, most of our survey participants (and those in other surveys as well) report fairly anemic sales in the \$210,000 to \$225,000 range.
- Recognizing that offset sales continue to decline and that

digital sales continue to increase, owners need to spend some “quiet time” getting together with spouses, partners and possibly managers and discussing how some of these facts, especially those staring most owners in the face, need to be addressed.

- It is interesting to note that even in the face of current and future declines in offset printing sales, a vast majority of owners (almost 90%) are reluctant to terminate press operators, choosing retraining or cross-training on other devices. The problem is that many of these new digital devices they are being trained to operate simply do not require full-time operators and yet those that are being retrained are indeed working a full 40 hours each week. It is no wonder that many firms following this path tend to report below average sales per employee numbers. Waiting until a press operator retires or resigns is probably not the most efficient manner nor best method for making staffing decisions in a company.
- Eliminating the offset printing department is certainly not an easy decision. Although almost 48% of our survey respondents indicated they are seriously considering making this move, another 52%

said they are not ready. Regardless of where you are at, you might find some comfort in the comments offered by owners just like yourself... some who have already closed that department and others who are not ready to shut the door completely. Be sure and read the various comments offered in our appendix.

- Producing envelopes on digital devices, as opposed to printing them offset, is more than just a trend. More than 55% of our respondents told us they are already using such devices, with 60% of the remaining printers telling us that they are giving this move serious consideration. Approximately 15% told us they definitely plan to acquire such a device (inkjet or toner based) within the next 12-18 months. With a price range of \$13-18,000 for many of these devices, acquiring such a device seems a reasonable and immediate step forward – especially as a first step in closing the offset printing department completely. In the old days, it used to be said by many owners that *“I would love to close this department completely and switch to digital 100% but how am I going to get my envelopes printed?”* Now, there is a real option, and this is part of the decision-making process discussed previously.

APPENDIX

APPENDIX - Additional comments provided by survey participants for the various questions appearing in our survey.

Questions #8 & #9 – Comments regarding recent or future termination of press operators. Please note that many participants provided the same comments below for question #10 as well:

- *3 years ago press operator walked out and then we sold all of our heavy iron.*
- *As of July 1, 2015 we completely shut down our offset section, and converted it completely to digital. The 2 offset operators I currently have are now digital press operators.*
- *We've been operating with one pressman*

- *We cut back hours when slow*
- *Did that in 2011*
- *Dropped from 1.75 to 1*
- *Full time press operator retired 12 months ago*
- *Hours significantly cut*
- *I - the owner - have been running the press on weekends, for the last five years. I am now brokering out those few items, like envelopes, that NEED offset.*
- *I have a full-time press operator (and other duties) resign whom I will not replace*
- *I terminated my press worker in 2007 and shut down my offset press department then.*
- *No offset presses - only digital printers*
- *One moved away and will not be replaced. Remaining pressman also does bindery to keep busy.*
- *Our last press operator has retired & we have shut down the presses & gone fully digital*
- *Over the last year our 1 press operator has started doing tasks in other areas.*
- *Press operator has always done bindery and now trained in digital printing also.*
- *Press operators over the last 5-8 years have been cross trained in other departments.*
- *Pressman out sick with Cancer. Was working 3 days/week.*
- *PT Press Operator transferred to bindery and short run digital operator on the Ijet.*
- *Should have, but haven't yet.*
- *Too small of shop to terminate. He just does other tasks such as wide format*
- *Unable to perform up to our standards*
- *We are a copy shop Press work subbed out I broke it down above by offset sub out*
- *We have 2 people who run our offset equipment/1 also does all bindery finish work, the other runs our mailing operation, building maintenance and is now doing web design work. We are re-shifting duties to fill the gap. Also, 1 of these people works only when needed some weeks 6 hours others 40 and it works for both of us.*
- *We have 2 people, including our Production Mgr., that can run presses. Hours have declined, but no terminations.*
- *We have a part time employee that can do some press work and has done quite a bit in the past. She spends nearly all of her time in bindery now.*
- *We have been all digital since 2010. We outsource offset printing when needed.*
- *We have gone from 3.5 operators with 5 presses in 2009 to 1 operator and 2 presses today.*
- *We retrained our press operator for large format.*
- *We schedule the press operator to come in as needed. He works at another business, as well.*
- *We started outsourcing offset work 3 years ago.*
- *We switched from Offset to Riso Duplicators, no press operator required.*
- *We went all digital 5 years ago*
- *When we got rid of presses 4 years ago, we move the press person to digital.*
- *Will as soon as we get rid of presses*

Question #10 – General comments offered regarding current offset printing operations, including those that have been closed. Note, many of the comments below were repeated for previous questions #8 & #9:

- *3 years ago press operator walked out and then we sold all of our heavy iron.*
- *As of July 1, 2015 we completely shut down our offset section, and converted it completely to digital. The 2 offset operators I currently have are now digital press operators.*
- *Closed the department in 2011*
- *We've dropped from 1.75 to 1 press operators*
- *Full time press operator retired 12 months ago*
- *I actually have sold my presses to a nearby printer and job my presswork to him. I'm actually all digital in-house now and increasing in digital capability. The presswork that I have to do now is critical PMS color that can't be done in CMYK and very long or oversized runs.*
- *I have a full-time press operator (and other duties) resign whom I will not replace*
- *I terminated my press worker in 2007 and shut down my offset press department then.*
- *No offset presses - only digital printers*
- *One moved away and will not be replaced. Remaining pressman also does bindery to keep busy.*
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- *We went all digital 5 years ago*
- *When we got rid of presses 4 years ago, we move the press person to digital.*
- *Will as soon as we get rid of presses*

Questions #11 – Comments regarding the growth of digital during the next 12-18 months:

- *Already all digital.*
- *Also more brokering*
- *Customers are asking for fewer copies. It makes more sense to put them on the digital copier than the offset press.*
- *Everything is uncertain in our market.*
- *In the last 3 weeks we received our Xante Impressia*
- *It would depend on the capacity in the Offset Department and the scope of the work.*
- *Most work has already shifted. The remaining work is best suited to offset*
- *Much of our work has migrated to digital, keep press mostly for PMS work and envelopes*
- *New capabilities (and cost savings) on digital presses, along with dedicated digital envelope press should allow us to completely transition remaining work to digital*
- *Our digital will grow with customers wanting more full color presentation work. I don't see shifting offset work in the near future*
- *We are doing marginal work for other printers who do not have some of the digital capabilities that we offer, along with some of their odd offset jobs.*
- *We have actually driven a lot of work back to offset that was digital*
- *We have already transitioned all work that fits to the appropriate digital device.*
- *We have good brokering partners, and we get good markups*
- *We will be looking at the Fuji J press or the HP 10000 to replace the Heidelberg in a few years*
- *Who knows*
- *Yes, our two "digital presses" currently can print any job that comes in the shop, including envelopes, and synthetic stocks.*

Questions #12 – Comments regarding the total elimination of in-house offset printing:

- *3 or 4 years ago we had a 2c Itek 3985 that was near the end of its life. At that point we considered brokering all our color work to larger shops. We were instead able to acquire a Ryobi DI which has saved this department. Because the DI has much more capacity, we are looking further outside of our geographic area for more work and are beginning to have some success. Offset still has its place, but the competition is disappearing rapidly so there's more work for those of us that remain.*
- *50% of our volume is basic black & white, will continue to employ offset for this product*
- *Already did.*
- *Already gone.*
- *Already have*
- *Considering the rural location and lacking a suitable partner to broker to, makes this unlikely*

- *Did if 6-8 years ago*
- *Did it already*
- *Eliminated years ago*
- *Eliminating because of labor, maintenance, and environmental compliance issues. We are adding faster and more capable digital equipment. A small amount will shift to outside providers where digital cannot do the job - some Pantone colors, etc.*
- *Hoping others will. Also the economy is growing and there seems to be more business.*
- *I will still keep my press. I can run it if needed.*
- *If we decided we could use the space more profitably by say adding wide format in house than we would do away with offset but currently could do both and since we own the equipment and the building and 1 of the owners runs the offset it works for us to keep it in house.*
- *Like I said I have done it in the past and could possibly decide again for future is business does not stay stable.*
- *Never had offset - always a pure digital shop*
- *No brokering, but yes, we have 2 high end production digital "presses" and have not turned on the Ryobi 3302 for over 18 months... :(*
- *No need. Digital handles it all very nicely! We sold all of our offset single and four-color offset presses as of 3 months ago. No more chemicals and make-ready. Turn-around time and throughput is up 50%! Also, in a shrinking pool of skilled operators, expensive press parts and supplies, shorter run lengths, and "immediate" turn-around times, digital is a no brainer!*
- *Not there yet.*
- *Not yet*
- *Our decline in offset printing mostly took place over the past three years due to digital options.*
- *Waiting until press operator retires to make the final decision. As long as the presses are paid for and we have an operator, we'll continue in-house until we need the space for other equipment.*
- *We already did that. Sold our last press 3 years ago.*
- *We already do*
- *We are considering expanding our offset capabilities. The more "retro" offset becomes, the more likely we are to add equipment to compliment our foil stamping, embossing, die-cutting, and letterpress printing services.*
- *We did*
- *We did over a year ago, it is more cost effective to buy print plus it gives us a lot more flexibility. we were never big enough 1.5 mil approx in offset sales to get aggressive paper cost, our current trade sources have significantly better cost of stock and running multiple shifts allow them to offer lower costs.*
- *We did so in 2007*
- *We have a 4-color press which is busy. We will eliminate our 1- and 2-color presses as soon as we figure out how to deal with large quantities (5000+) of envelopes.*
- *We have done this!*
- *We have eliminated in-house offset*
- *We occupy a niche that shipping distance and time often prohibits brokering. As long as our pressman does not retire we will continue to print offset.*
- *We switched to digital over 10 years ago. We could see the writing on the wall. Have never looked back.*

- *While we currently produce ZERO in our offset, I still hang on to it.*
- *Will keep until a major expense is required, then will re-evaluate*

Questions #13 – Comments regarding dedicated digital or inkjet devices capable of printing envelopes:

- *We currently own one*
- *We are waiting for new digital printing report to come out to help us make a decision on what envelope press to consider.*
- *iJet - Memjet*
- *inkjet*
- *IntoPrint (Okidata based) we've worn it out since 2009*
- *memjet*
- *Okidata ProColor C910*
- *Our digital color machine has envelope capabilities, but used for short runs and variable only.*
- *Our new Ricoh 7100x prints most sizes of envelopes, even 6 3/4 window...*
- *Outsource some envelope work*
- *Printware Ijet*
- *This was the key for us to eliminate offset*
- *We can and do run short runs on our Ricoh production copiers. We are looking to purchase a Xante type machine in the next 6-12 months.*
- *We have an OKI - do not love it. We run many envelopes on our Hamada as it is more cost effective than the OKI*
- *We print several million offset envelopes each year and only about 10,000 digitally*
- *We run our color on our digital device and black on a risk*
- *We use it mostly for short run 4 color and short run addressing*
- *We will soon*
- *We own a Xante.*
- *Xante Impressia*
- *Xerox versant 80*

Question #14 – Comments regarding future plans for acquiring an envelope printer:

- *Envelope printing has seen dramatic decline as many mailing jobs are replaced by email*
- *If over 2500 envelopes, we broker to an envelope trade printer*
- *Looking to upgrade our current printer.*
- *Not a huge call in our area for full color envelopes. We have a 2c AB Dick 9810 with a continuous envelope feeder attached that is our dedicated envelope press. We may be thinking more seriously about digital one if we didn't have this setup.*

- *Our new Xerox Versant runs envelopes, but slowly. It is not a true production envelope printer. That being said, it is so inexpensive to farm out digital envelopes that at this point we would not consider purchasing another digital envelope printer.*
- *Our OKI works so well I'm looking for another!*
- *Our Ricoh 7100x will print almost any envelope*
- *Purchasing one in the next 30-45 days. This will replace one press dedicated to envelopes.*
- *We already broker runs of 10K or greater*
- *We are considering an inkjet to go along with our toner based digital envelope unit*
- *We are going to look at what is out there to possibly augment our capabilities - possibly adding inkjet.*
- *We broker all 4C envelopes and print single and two-color in house. One 2c press is idle.*
- *We have a soft consideration to purchase a envelope printer.*
- *We may add the laser variety of envelope presses.*
- *We only run Envelopes on our offset press*
- *We print 1 to 3 color envelopes in house and broker 4 color and long runs*
- *We will probably add additional digital envelope capacity. Newer digital printers from Xerox, KM and Canon all offer envelope capability.*
- *Will run envelopes on our digital press*