

❖ SUMMARY ❖

[2015 version of MFP Market Forecast]

**“Comprehensive Analysis of MFP  
Strategies Designed to Enhance  
Non-hardware Scalability”**

**(Comprehensive Analysis / PPC Market /  
Printer Market / Fax Market)**

*=An Intensive and Extensive Report on Electrophotographic Products  
from Office to Professional Use=*



A3 color MFP  
(Samsung Electronics)  
**"X7600GX"**  
(60ppm in color and monochrome)



A4 color printer (HP)  
**"HP Color laserJet Pro M252"**  
(18ppm in color and monochrome)



A3+ color production printer (Canon)  
**"imagePRESS C10000VP"**  
(100ppm in color and monochrome)

February 2016  
Data Supply Inc.



## 〈Research Overview〉

### I. Research Theme

[2015 version of MFP Market Forecast]

『Comprehensive Analysis of MFP Strategies Designed to Enhance Non-hardware Scalability』

=An Intensive and Extensive Report on Electrophotographic Products from Office to Professional Use=

### II. Research Overview

The industry of copiers and printers is likely to see more frequent and **large-scale realignment, buyout and integration**.

Such business consolidation or amalgamation of major manufacturers home and abroad would leave an **extreme and serious impact** on each toner, photoconductor and component industry, let alone hardware manufacturers.

This may be a good opportunity to **review and reexamine the current situation such as OEM relations** among manufacturers including **friendly business alliances formed with one another** and a possible impact of withdrawal of particular manufacturers. **Answers to all these questions are found in this report.**

What's vital when selling hardware machines is how to propose solutions including after-sale consumable products, services and security, which is a key to this business.

Regardless of the fact that office-use **copiers** are becoming more common for color use rather than monochrome use, the business structure is changing, affected by a growing number of A4 MFPs and **the revenue source shifting from hardware to non-hardware products and services**. As for **printers** that experience a shrinking market of monochrome machines, they depend on growth of the color printer market. Under this situation, manufacturers give up hoping to make profits by manufacturing and selling more products and making gains from after-sale supplies, just to trade off hardware costs. Rather, **in an effort to make profits from their own hardware machines, they now review their profit-making mechanisms for each product and even turn to OEM without hesitation, if the in-house manufacturing of low-cost printers is not possible**. The FAX market, on the other hand, is downsizing.

In contrast, **new production printers for professional printing use in the faster speed range are booming**, and they're available at lower costs and in more applications. Consumable products such as toner are also in greater demand as it becomes available in more colors.

Reflecting this trend, our yearly-published report focuses on **analysis of the current sales and prospects of "hardware" and "non-hardware" products and services categorized by hardware manufacturers**. As always, hardware shipment trend will be presented based on speeds, along with further categorization by manufactures, monochrome and color use, and regions (Japan, North America, Europe, China and elsewhere). In addition, other factors including shipment trend by brand, by A4 and A3 size, new product trend and sales distribution trend continue to be provided to better analyze the market trend.

This is our 24th report and we remain committed and hope to serve not only hardware manufacturers but also component manufactures and consumable product manufacturers among others that support the industry from inside and outside.

#### Speed range of hardware to be researched

① PC (1-10ppm)
② Segment 1 (11-20)
③ Segment 2 (21-30)
④ Segment 3 (31-40)
⑤ Segment 4 (41-69)
⑥ Segment 5 (70-90)
⑦ Segment 6 (91-)

#### Research region

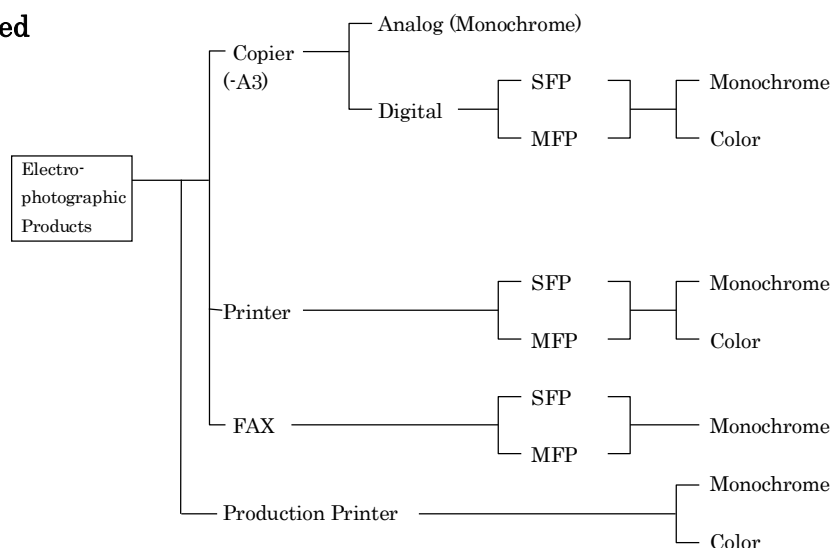
Japan
North America
Europe
China
Other regions

Color products are in the same classification as the speed of monochrome products.

#### Scope of research for hardware shipments

1. Shipments under engine manufactures
  - 1) Shipments under engine manufactures (In-house / OEM supply)
  - 2) Shipments under OEM
2. **Shipments by major printer vendors**

### III. Items Researched



### IV. Manufacturers Researched

#### 1. Main manufacturers (vendors)

##### 1) Copier manufacturers • vendors

Canon, Ricoh, Fuji Xerox (Xerox Corporation), Sharp, Toshiba TEC, Kyocera Document Solutions, Konica Minolta, Samsung Electronics (South Korea), Sindoh (South Korea)

##### 2) Printer (laser/LED) manufacturers • vendors

Canon, Fuji Xerox, Xerox Corporation, Konica Minolta, Oki Data, Brother Industries, Kyocera Document Solutions, Ricoh, Casio Computer, Hewlett-Packard, Seiko Epson, Samsung Electronics (South Korea), Dell, NEC, Fujitsu, Riso Kagaku, Toshiba TEC, Sindoh (South Korea), Seine (China), Lenovo (China) and others

##### 3) FAX manufacturers • vendors

Ricoh, Canon, Toshiba TEC, NEC, Panasonic System Networks, Brother Industries, Muratec, Konica Minolta, Oki Data, NTT East/West, Olivetti

##### 4) POD (for professional use) manufacturers • vendors

Canon, Océ, Ricoh, Fuji Xerox, Konica Minolta, HP Indigo, Kodak, Xeikon, Miyakoshi and others

#### 2. Relevant manufacturers • vendors

- 1) OEM manufacturers
- 2) Major dealers (vendors)
- 3) Component • material manufacturers
- 4) Other relevant business partners

### V. Research Period and Scope of Research

#### 1. Research period (including the past performance and future trend)

2013 through 2014 (results), and 2015 (estimate) through 2018 (forecast)

#### 2. Regions researched

Regions researched spread worldwide (North America, Europe, China, and elsewhere) and Japan

### VI. Research Method

#### 1. In-person interviews with manufacturers researched

2. Analysis and review of published literatures, materials and statistics
3. Analysis of data accumulated in Data Supply Inc.

**VII. Research Form, Research Period, etc.**

1. Research form: Multi-client form
2. Research compilation period: October 2015 through December 2015
3. Publication date: **scheduled at the end of February, 2016**
4. Report format: A4 size (in PDF format)
5. Price: \$6,000 (for a full report)
  - 1) Comprehensive Analysis/Copier and MFP Market \$3,500-
  - 2) Printer and MFP/Office-use Printer /Production Printer/FAX and MFP Market \$3,500-
  - 3) Printer and MFP/Office-use Printer /Production Printer Market \$2,500-
  - 4) Fax and MFP Market \$1,500-
6. Researchers  
Yukio Yamamoto and Kosuke Yoshida  
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E-mail: <yamamoto@datasupply.jp> <yoshida@datasupply.jp>

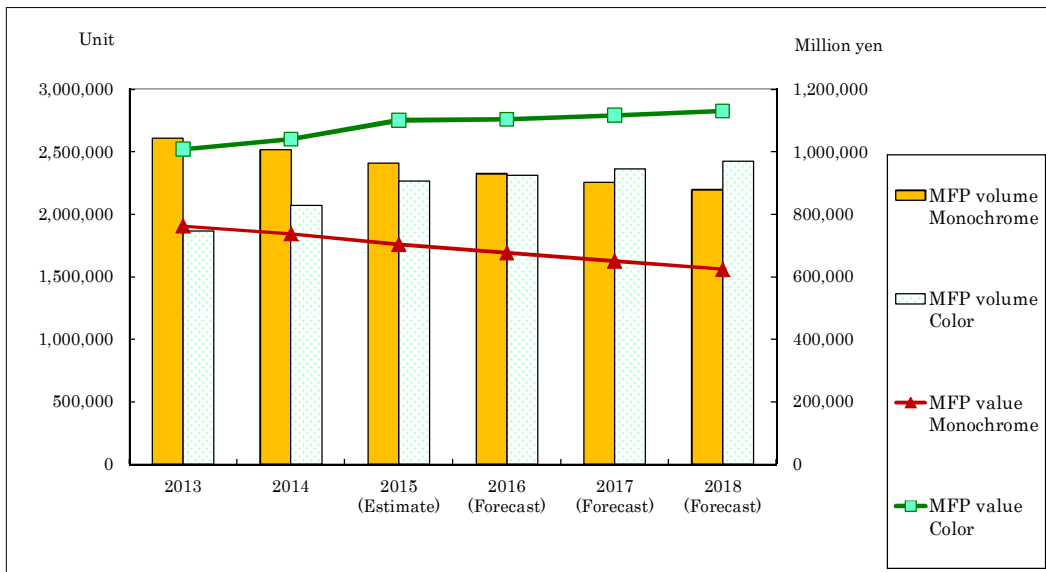
**7. How to Apply**

**Please apply via email with the company name, department, applicant's name and phone number and send it to Data Supply Inc.**

E-mail: <yamamoto@datasupply.jp> <yoshida@datasupply.jp>

## The Focus of Research

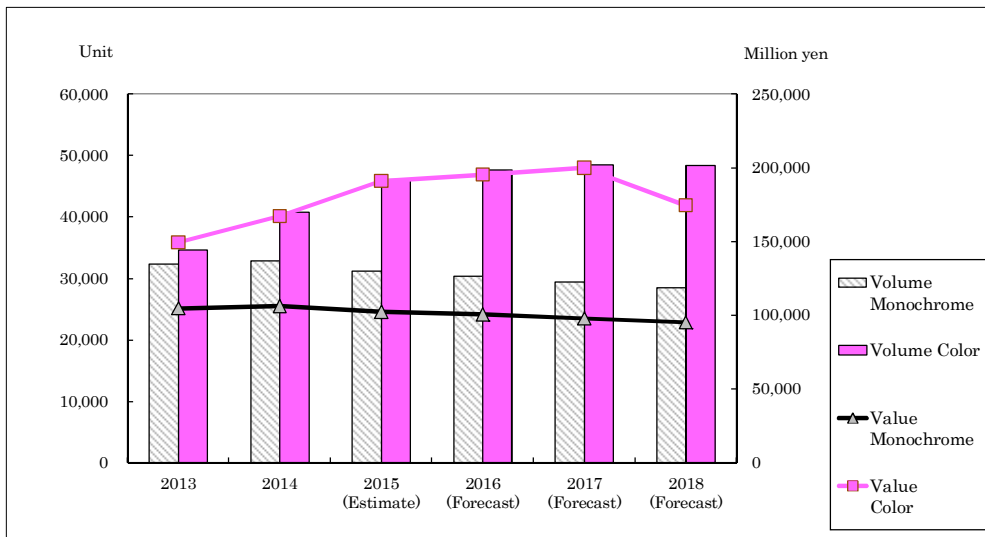
### 1. Office-use PPC (MFP) Market



Shipments of 2014 decreased in monochrome machines while color machines increased, which led to an increase in total shipments. The same trend is expected in 2015 and if this trend further continues, shipments of color machines will surpass those of monochrome machines by 2017.

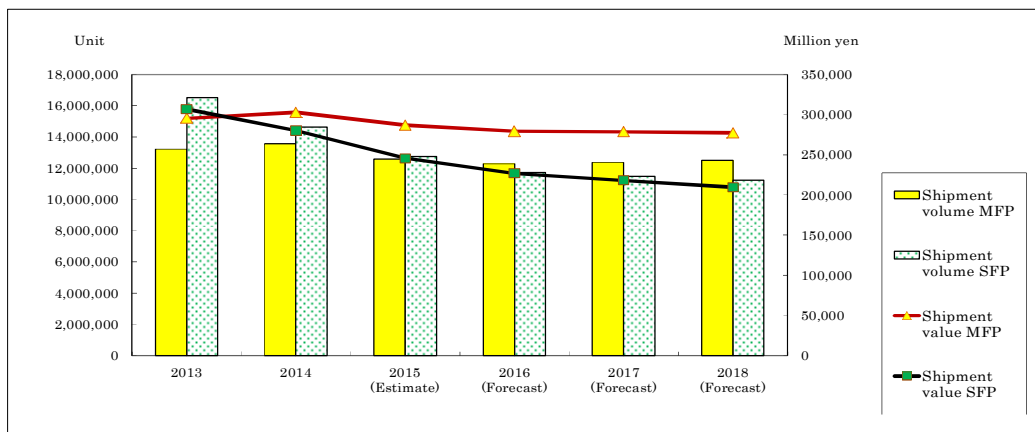
Shipment value in 2014, on the other hand, decreased in monochrome machines, while it increased in color machines, marking an increase in the total value. The same trend is expected in 2015, while a slight decrease is projected in total value from 2016 onwards.

### 2. Production Printer (PP) Market



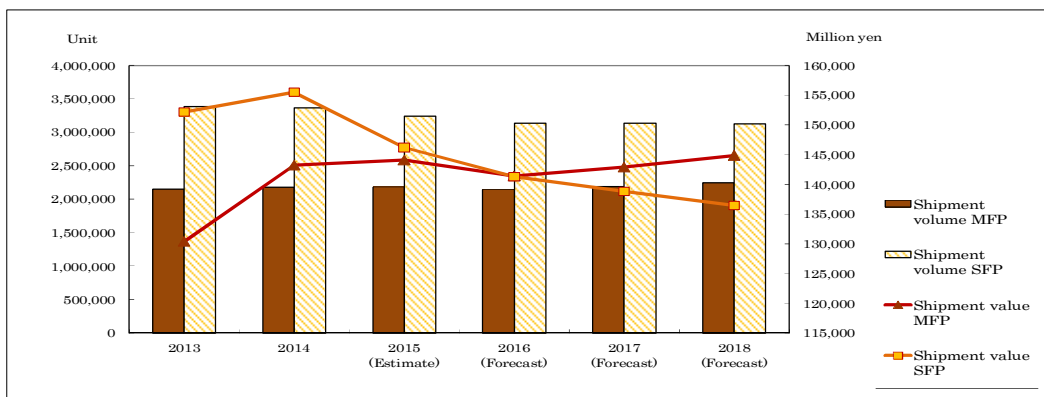
Both shipments and value of monochrome and color machines increased in 2014. Shipments of color machines grew even larger in 2015 with a two-digit growth. Growth is expected to continue and a large number of new products are released in all ranges of light, mid and heavy production printers. Monochrome production printers, on the other hand, are projected to decrease in shipments in 2015 and afterwards as their needs will be fulfilled by color machines.

### 3. Shipment Trend of Monochrome Laser / LED Printer • (MFP)



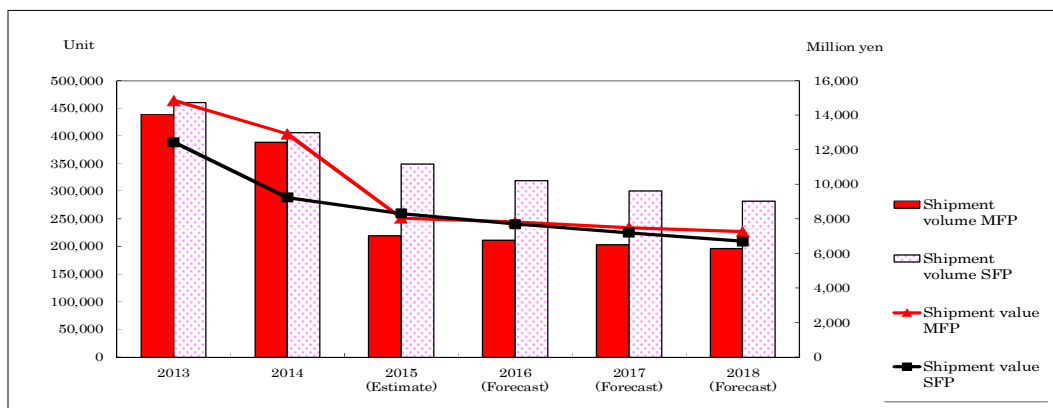
Shipments decreased in 2014 and the whole market began to shrink after a lot of major manufacturers suffered decreased shipments in the following year. Decrease is expected to continue and demand for MFPs will be larger in 2017.

### 4. Shipment Trend of Color Laser / LED Printer • (MFP)



Shipments slightly increased 100.3% year on year in 2014, while they decreased in 2015 and will remain the same or unchanged. Demand of MFPs will be larger in 2017. Shipment value, on the hand, increased 105.7% year on year in 2014; however, it is expected to decrease in 2015 and afterwards.

### 5. Shipment Trend of FAX



Year-on-year shipments kept decreasing greatly by 88.3% in 2014 and 71.6% in 2015. Demand for MFPs will also decrease.

◆ Image of the contents ◆

Extract from < Comprehensive Analysis >

\*Chart is filled with figures and comments in the full version.

5. Ratio of current sales comparison of hardware and non-hardware products

	PPC		Printer		PP	
	Hardware	Non-hardware	Hardware	Non-hardware	Hardware	Non-hardware
Canon						
Ricoh						
Fuji Xerox						
Sharp						
Kyocera Document Solutions						
Toshiba TEC						
Konica Minolta						
Samsung Electronics						
Brother						
Oki Data						
Casio Computer						
Lexmark						

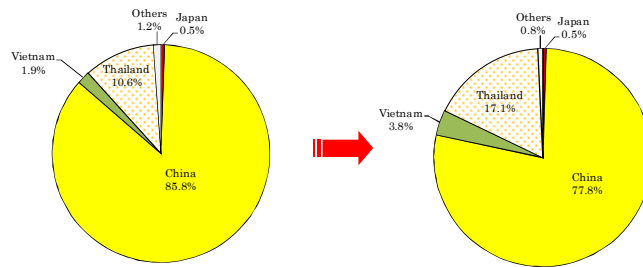
4. Change of production volume (ratio) in Japan and overseas

4-1. Overall

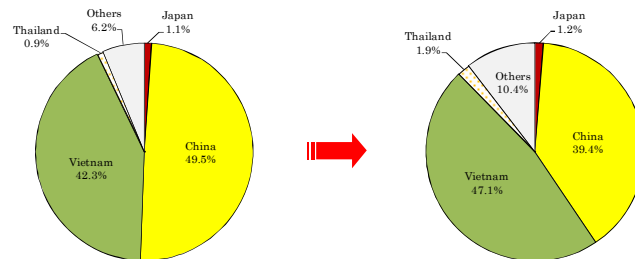
	2014						2018 (Forecast)					
	Japan	Overseas				Total	Japan	Overseas				Total
		China	Vietnam	Thailand	Others			China	Vietnam	Thailand	Others	
<b>PPC</b>	0.5	85.8	1.9	10.6	1.2	100.0	0.5	77.8	3.8	17.1	0.8	100.0
<b>Printer</b>	1.1	49.5	42.3	0.9	6.2	100.0	1.2	39.4	47.1	1.9	10.4	100.0
<b>FAX</b>	0.0	32.8	17.5	9.6	40.2	100.0	0.0	27.8	53.5	0.2	18.5	100.0

\*China is the center of production. Production volume including printers as the leading items is increasing in Thailand, Vietnam and other regions.

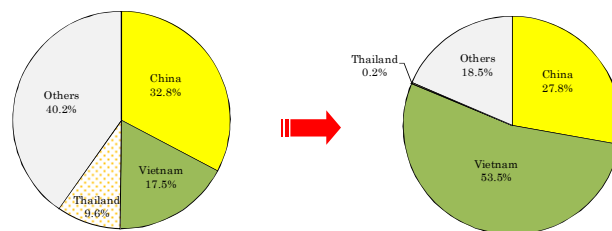
4-2. PPC (MFP) (overall)



4-3. Printer (overall)



4-4. FAX (overall)



Extract from < PPC market >

\*Chart is filled with figures and comments in the full version.

8-2. Color PPC

1) Overall shipment volume

		2013		2014		2015 (estimate)		2016 (forecast)		2017 (forecast)		2018 (forecast)	
		%		%		%		%		%		%	
<b>A4</b>	MFP												
	SFP												
	<b>Total</b>												
<b>A3</b>	MFP												
	SFP												
	<b>Total</b>												
<b>Sum total</b>	MFP												
	SFP												
	<b>Total</b>												

2) Shipment volume in Japan

		2013		2014	
		%		%	
<b>A4</b>	MFP				
	SFP				
	<b>Total</b>				
<b>A3</b>	MFP				
	SFP				
	<b>Total</b>				
<b>Sum total</b>	MFP				
	SFP				
	<b>Total</b>				

3) Overseas shipment volume

		2013		2014	
		%		%	
<b>A4</b>	MFP				
	SFP				
	<b>Total</b>				
<b>A3</b>	MFP				
	SFP				
	<b>Total</b>				
<b>Sum total</b>	MFP				
	SFP				
	<b>Total</b>				

14. Shipment volume of digital PPC (monochrome + color, Japan and overseas) by output size

1) Overall shipment volume

		2013		2014		2015 (estimate)		2016 (forecast)		2017 (forecast)		2018 (forecast)	
		%		%		%		%		%		%	
<b>A4</b>	Monochrome	MFP											
		SFP											
	<b>Subtotal</b>												
<b>A4</b>	Color	MFP											
		SFP											
	<b>Subtotal</b>												
<b>A4</b>	<b>Total</b>												
<b>A3</b>	Monochrome	MFP											
		SFP											
	<b>Subtotal</b>												
<b>A3</b>	Color	MFP											
		SFP											
	<b>Subtotal</b>												
<b>A3</b>	<b>Total</b>												
<b>Sum total</b>	MFP												
	SFP												
	<b>Total</b>												

2) Shipment volume in Japan

		2013		2014		2015 (estimate)		2016 (forecast)		2017 (forecast)		2018 (forecast)	
		%		%		%		%		%		%	
<b>A4</b>	Monochrome	MFP											
		SFP											
	<b>Subtotal</b>												
<b>A4</b>	Color	MFP											
		SFP											
	<b>Subtotal</b>												
<b>A4</b>	<b>Total</b>												
<b>A3</b>	Monochrome	MFP											
		SFP											
	<b>Subtotal</b>												
<b>A3</b>	Color	MFP											
		SFP											
	<b>Subtotal</b>												
<b>A3</b>	<b>Total</b>												
<b>Sum total</b>	MFP												
	SFP												
	<b>Total</b>												



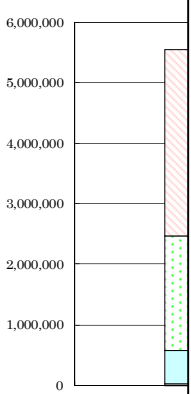
Extract from < Printer market >

\*Chart is filled with figures and comments in the full version.

7. Shipment status of color printer by speed

Shipment volume

Speed		2013		2014		2015 (estimate)		2016 (forecast)		2017 (forecast)		2018 (forecast)		Unit
			%		%		%		%		%		%	
1 ~ 10ppm	MFP													
	SFP													
	<b>Total</b>													
11 ~ 20ppm	MFP													
	SFP													
	<b>Total</b>													
21 ~ 30ppm	MFP													
	SFP													
	<b>Total</b>													
31 ~ 40ppm	MFP													
	SFP													
	<b>Total</b>													
41 ~ 60ppm	MFP													
	SFP													
	<b>Total</b>													
70 ~ 90ppm	MFP													
	SFP													
	<b>Total</b>													
91ppm ~	MFP													
	SFP													
	<b>Total</b>													
<b>Sum total</b>	MFP													
	SFP													
	<b>Total</b>													

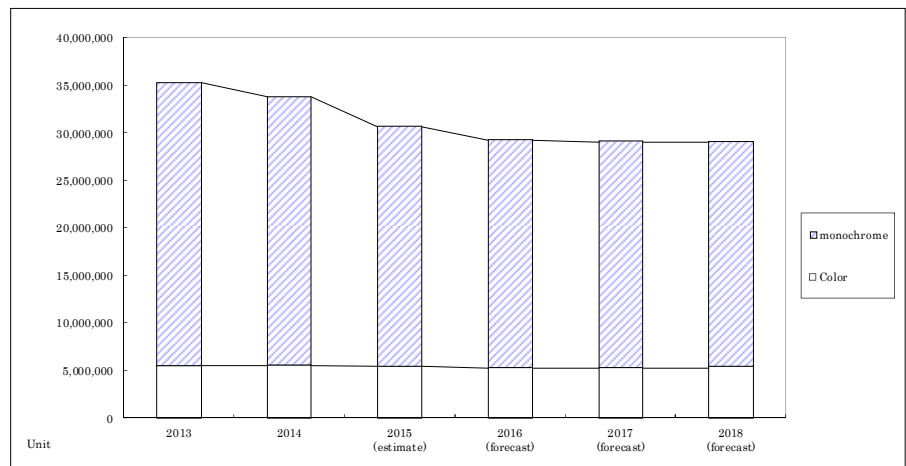


[C. Printer Market]

C-1. Total tabulation of office printer market

1. Overall shipment volume

Item	Year	2013		2014		2015 (estimate)		2016 (forecast)		2017 (forecast)		2018 (forecast)		Unit
			%		%		%		%		%		%	
monochrome	MFP	13,236,750	37.5	13,581,220	40.2	12,586,500	40.9	12,294,350	42.0	12,372,550	42.4	12,512,250	43.0	
	SFP	16,519,130	46.8	14,640,080	43.3	12,747,860	41.4	11,716,250	40.0	11,466,500	39.3	11,230,800	38.6	
	<b>Total</b>	<b>29,755,880</b>	<b>84.3</b>	<b>28,221,300</b>	<b>83.6</b>	<b>25,334,360</b>	<b>82.4</b>	<b>24,010,600</b>	<b>81.9</b>	<b>23,839,050</b>	<b>81.7</b>	<b>23,743,050</b>	<b>81.6</b>	
	%			94.8		89.8		94.8		99.3		99.6		
Color	MFP	2,151,150	6.1	2,181,930	6.5	2,186,330	7.1	2,147,910	7.3	2,193,780	7.5	2,247,110	7.7	
	SFP	3,387,190	9.6	3,370,290	10.0	3,238,700	10.5	3,141,980	10.7	3,138,040	10.8	3,128,900	10.7	
	<b>Total</b>	<b>5,538,340</b>	<b>15.7</b>	<b>5,552,220</b>	<b>16.4</b>	<b>5,425,030</b>	<b>17.6</b>	<b>5,289,890</b>	<b>18.1</b>	<b>5,331,820</b>	<b>18.9</b>	<b>5,376,010</b>	<b>18.6</b>	
	%			100.3		97.7		97.5		100.8		100.8		
<b>Sum total</b>	MFP	15,387,900	43.6	15,763,150	46.7	14,772,830	48.0	14,442,260	49.3	14,566,330	49.9	14,759,360	50.7	
	SFP	19,906,320	56.4	18,010,370	53.3	15,986,560	52.0	14,858,230	50.7	14,604,540	50.1	14,359,700	49.3	
	<b>Total</b>	<b>35,294,220</b>	<b>100.0</b>	<b>33,773,520</b>	<b>100.0</b>	<b>30,769,390</b>	<b>100.0</b>	<b>28,909,490</b>	<b>100.0</b>	<b>28,170,870</b>	<b>100.0</b>	<b>28,119,060</b>	<b>100.0</b>	
	%			95.7		91.1		95.3		99.6		99.8		



Extract from < Office LBP / LED printer manufacturer individual volume >  
< Production Printing Market >

\*Chart is filled with figures and comments in the full version.

C-3. Market of Production Printing  
C-3-1. Overall  
1. Shipment volume

PP...Production printer  
C...Comprehensive layout machine

Year	2013		2014		2015 (estimate)		2016 (forecast)		2017 (forecast)		2018 (forecast)		Unit	
		%		%		%		%		%		%		
Color	PP	Japanese manufacturers	Japan											
			Overseas											
			Total											
			%											
	C	Japanese manufacturers	Japan											
			Overseas											
			Total											
			%											
	Sum total													
	%													
Total	Japan													
	Overseas													
	Total													
	%													
monochrome	PP	Japanese manufacturers	Japan											
			Overseas											
			Total											
			%											
	C	Japanese manufacturers	Japan											
			Overseas											
			Total											
			%											
	Sum total													
	%													
Total	Japan													
	Overseas													
	Total													
	%													

\*excluding continuous forms (please refer to the individual Note: Production of comprehensive layout machines is com. The above chart shows that the number of genuine compe the number will reduced to 400 in 2017 before reaching zero printers.

① The production printing market in 2014 grew significant marked 101.7%.  
As for color machines, "light" production machines accou have been rushing to introduce new models and there's ple expected to lead the market. In addition, there have been o printer fields, adding momentum to the expanding market. A new targeted use of color production printers includes 10,000 copies or below) covered by offset printing technolog with inkjet printers on the market.  
Shipments of monochrome machines, on the other hand, production of color production printers: shipments of mono

\*Other manufacturers include Hewlett-Packard, Xeiikon ar estimated at nearly several hundreds of units a year.

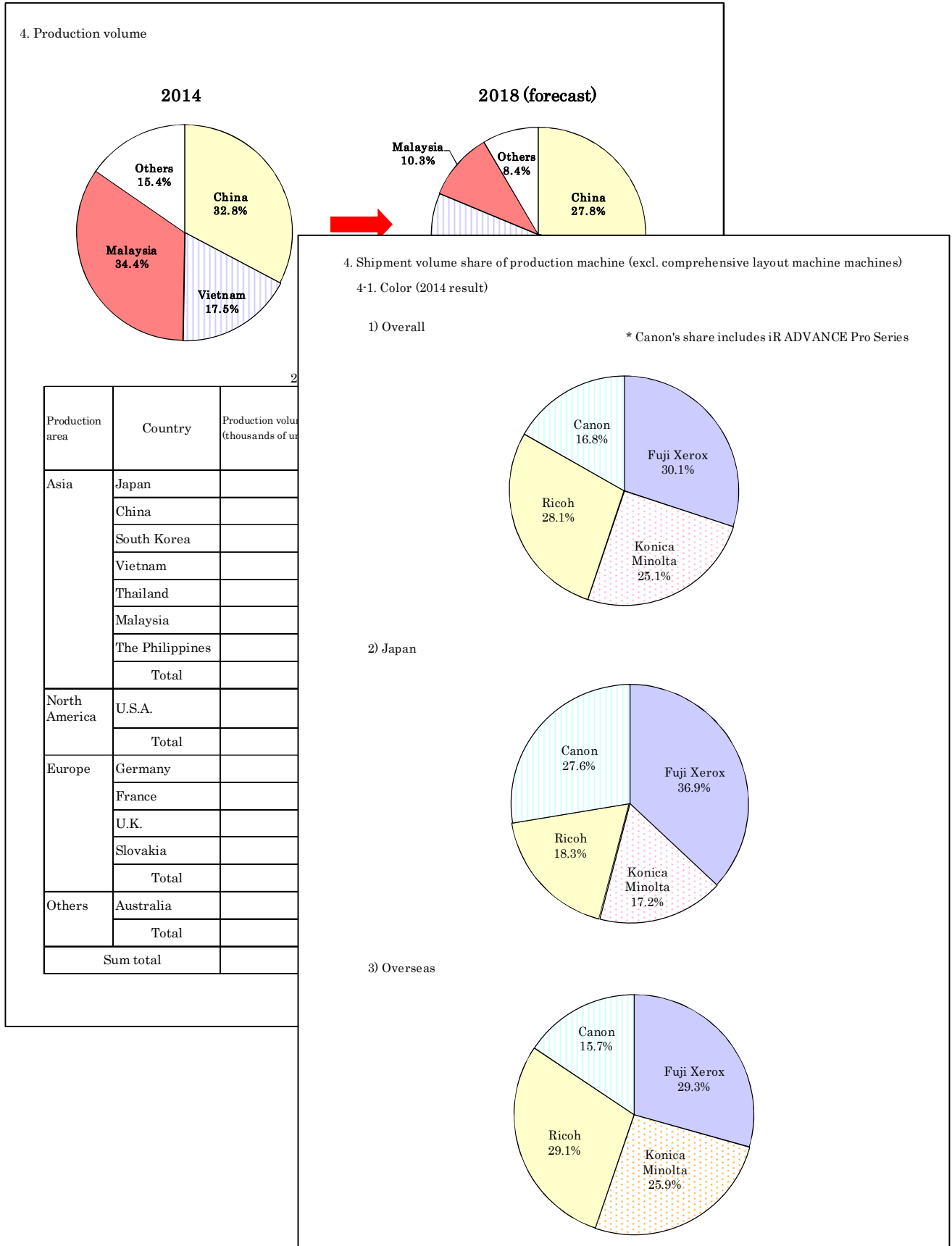
② Sales ratio of hardware and non-hardware product

	Hardware (%)	Non-hardware (%)
Fuji Xerox	35	65
Konica Minolta	40	60
Ricoh	41	59
Canon	35	65

OEM from Fuji Xerox	
Dell	"C1760nw" (A4/released in November 2012/\$279/12ppm in color, 15ppm in monochrome)
	"E525w" (A4/released in May 2015/\$329/18ppm in color and monochrome/MFP)
	"2660dn" (A4/released in October 2013/n/a/27ppm in color and monochrome)
	"C3765dnf/C3760dn/C3760n" (ended in 2014) (A4/released in July 2012/\$1,099, \$649, \$549/36ppm in color and monochrome/MFP)
Seiko Epson	"LP-S520" (A4/released in August 2011/29 thousand yen/10ppm in color, 12ppm in monochrome)
	"Acu Laser CX17" (A4/released in October 2011/12ppm in color, 15ppm in monochrome/MFP)
	"C2900N" (A4/released in August 2011/23ppm in color and monochrome)
	"LP-S6160" (A3/released in January 2016/open price/25ppm in color and monochrome)
	"LP-M8040/S7160" (A3/released in October 2013/released in October 2015/open price/30ppm in color and monochrome/MFP/SFP)
	"LP-S8160" (A3/released in October 2015/open price/32ppm in color and monochrome)
Color	"LP-M5300/S5300" (A3/released in June 2012/199 thousand yen-/ 8ppm in color, 35.8ppm in monochrome/MFP/SFP)
	"MultiWriter5600C" (A4/10ppm in color, 12ppm in monochrome)
	"MultiWriter5650C/F" (A4/12ppm in color, 15ppm in monochrome)
	"MultiWriter5750C" (A4/18ppm in color, 20ppm in monochrome)
	"Color MultiWriter9110C" (A4/32ppm in color and monochrome)
	"Color MultiWriter5900C/5900CP" (A4/35ppm in color and monochrome)
	"Color MultiWriter9010C" (A3/25ppm in color and monochrome)
	"MultiWriter2900C" (A3/8ppm in color, 35ppm in monochrome)
	"Color MultiWriter9600C" (A3/40ppm in color and monochrome)
	"MultiWriter9950C" (A3/50ppm in color, 55ppm in monochrome)
Lexmark	"X950de" (A3/40ppm in color, 45ppm in monochrome) MFP
	"X950de" (A3/45ppm in color and monochrome) Printer
	"X942de" (A3/45ppm in color, 50ppm in monochrome) MFP
	"X954dhe" (A3/50ppm in color, 55ppm in monochrome) MFP

Extract from < Production Printing Market > < FAX market >

\*Chart is filled with figures and comments in the full version.



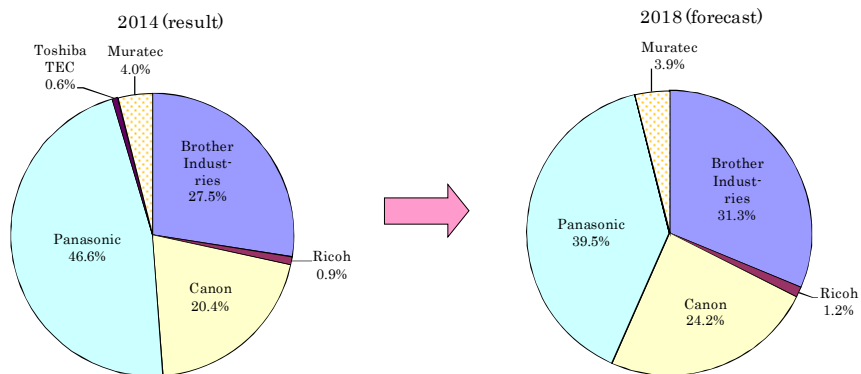
Extract from < FAX market >

\*Chart is filled with figures and comments in the full version.

6. Shipment volume / value of fax-based MFP and SFP by manufacturer

1) Shipment volume

		2013		2014		2015 (estimate)		2016 (forecast)		2017 (forecast)		2018 (forecast)	
		%		%		%		%		%		%	
Brother Industries	MFP												
	SFP												
	%												
Ricoh	MFP												
	SFP												
	%												
Canon	MFP												
	SFP												
	%												
Panasonic	MFP												
	SFP												
	%												
Toshiba TEC	MFP												
	SFP												
	%												
Muratec	MFP												
	SFP												
	%												
<b>Sum total</b>	<b>MFP</b>												
	<b>SFP</b>												
	<b>%</b>												



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For office use / For commercial use (shipment volume / shipment value)	4
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Overall (MFP only) / MFP ratio of monochrome PPC (analog + digital)	
MFP ratio of color PPC / MFP ratio of monochrome laser / LED printer	
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