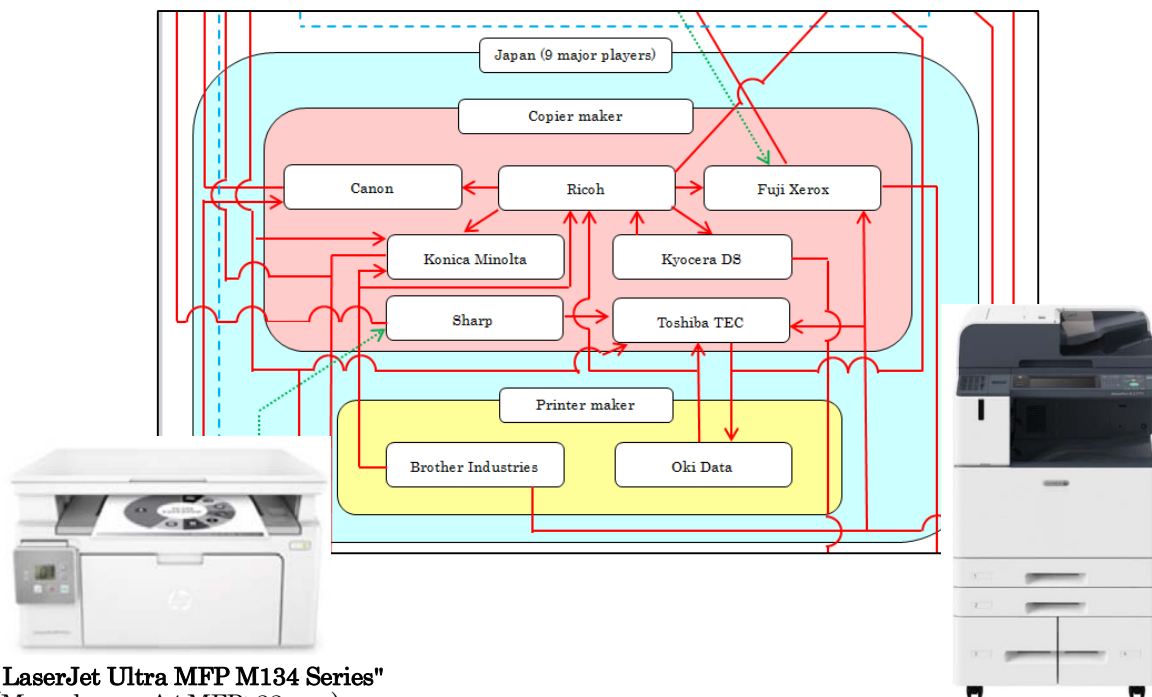


❖ SUMMARY ❖

[2016 version of MFP Market Forecast]

**“Future Prospects of Each Maker
Facing the Game-changing
Reorganization of the Industry”**
(Comprehensive Analysis / PPC Market / Printer
Market / Fax Market)

*=A comprehensive review of sales regions, production sites, OEM relations,
component/consumable supplies=*



"HP LaserJet Ultra MFP M134 Series"
(Monochrome A4 MFP: 22ppm)

Featuring a separate toner cartridge and drum unit

"Fuji Xerox ApeosPort-VI C7771"
(Color A3+ MFP: 70ppm in color and monochrome)

Featuring the advanced cloud capabilities

March 2017
Data Supply Inc.



〈Research Overview〉

I. Research Theme

[2016 version of MFP Market Forecast]

『Future Prospects of Each Maker Facing the Game-changing Reorganization of the Industry』

= A comprehensive review of sales regions, production sites, OEM relations, component/consumable supplies=

II. Research Overview

The office-equipment industry is experiencing successive large-scale M&A cases. It began with **the acquisition of Lexmark by China-based Apex** on April 19 in 2016. Apex has complex relations with other printer makers and sales companies, such as Seine Technology and Lenovo in terms of funding. How will the state-funded Apex Group steer the wheel and what's the Chinese government's intention behind this? The acquisition will be a sound and healthy one, as long as it's only a matter of technological and sales competition, but it actually will leave a huge impact, because intellectual property including patents will probably be downplayed as it has in the past M&A cases. In addition, **the merger of the printer business of Samsung Electronics by U.S.-based HP** on September 12, 2016 shook the entire industry. HP apparently seeks more than just buying the business in the red, and **attention is on its printer business tied with Canon**, which supplies engines to HP. Meanwhile, an American printer technology company, **Dell, has decided to make its printer sales regions smaller and limited within its own country**, and **Xerox Corporation is slated to split itself before the end of 2016**. Should this be regarded as the first step toward selling the whole business? What about **Taiwan-based Hon Hai, which purchased Sharp**? And what about less profitable makers under speculation that they'll go on sale?

The entire series of big moves signals the next chapter of the office-equipment industry--that is, the entire industry diagram will be redesigned, with Japanese makers remaining top, but **Chinese, Taiwanese and U.S. makers will be reshuffled greatly and quickly**. Consequently, some major makers will lose their current positions, which will **affect their sales regions, profits, production sites, OEM relations, as well as materials used for component/consumable supplies and supply routes in every single way**.

In contrast to the shrinking office-equipment industry, market for production printers for professional printing use is robust with new products on the market, with more focus on cultivating new applications including packaging use. However, **U.S.-based Kodak has decided to sell its production printing business**, which marks the first step of its business reorganization.

In relation to all this, the 2016 report places its focus on **changes in sales by maker and region, new OEM relations, production sites, as well as changes in production volume by site and others**.

Items covered under research will be **sales share between "hardware" and "non-hardware" models, the current profit-making structure, and its future trend**. Shipment trend of hardware models by maker, monochrome and color application, region (Japan, North America, Europe, China, and elsewhere), and speed, as well as shipment by brand and A4/A3, trend of new products and sales channels will also be analyzed.

We hope that **the 25th report** will be helpful to all hardware makers, component makers, consumable supply makers, and many others in the related business field in Japan and overseas.

Speed range of hardware models

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 and up)

Regions

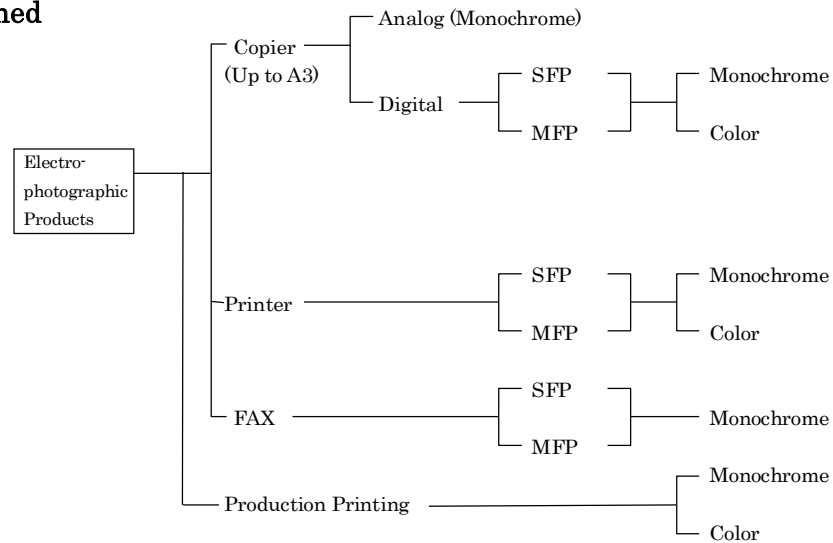
Japan
North America
Europe
China
Other regions

Color speeds are classified as monochrome speeds.

Scope of research for hardware shipments

1. Shipment as engine makers
Shipment as engine makers (In-house / OEM supply)
2. OEM from other makers
3. **Shipment by major printer maker/vendor**

III. Items Researched



IV. Makers Covered

1. Major makers (vendors)

1) Copier makers (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) makers (vendors)

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

3) FAX makers (vendors)

Ricoh, Canon, Toshiba TEC, NEC, Panasonic System Networks, Brother Industries, Muratec, NTT East/West

4) PP (for professional use) makers (vendors)

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

2. Relevant makers (vendors)

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

V. Research Period and Regions Covered

1. Research period

2014 to 2015 (results), and 2016 (estimates) through 2019 (forecasts)

2. Regions covered

Regions are covered worldwide including Japan, North America, Europe, China, and elsewhere.

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 2016 through December 2016
3. Publication date: **early March, 2017**
4. Report format: A4 size (in PDF format)
5. Price: \$6,000 (for a complete report)
 - 1) Comprehensive Analysis/Copier and MFP Market \$3,500-
 - 2) Printer and MFP/Office Printer/Production Printer/FAX and MFP Market \$3,500-
 - 3) Printer and MFP/Office Printer/Production Printer Market \$2,500-
 - 4) Fax and MFP Market \$1,500-
6. Researchers
Yukio Yamamoto and Kosuke Yoshida
Phone: +81-3-3831-9201, FAX: +81-3-3831-9204
E-mail: <yamamoto@datasupply.jp> <yoshida@datasupply.jp>

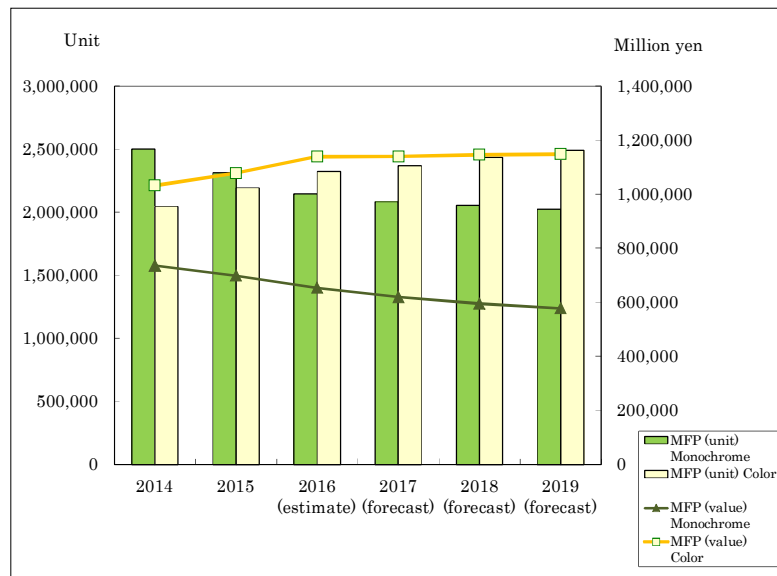
7. How to Apply

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

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

Focus of Research

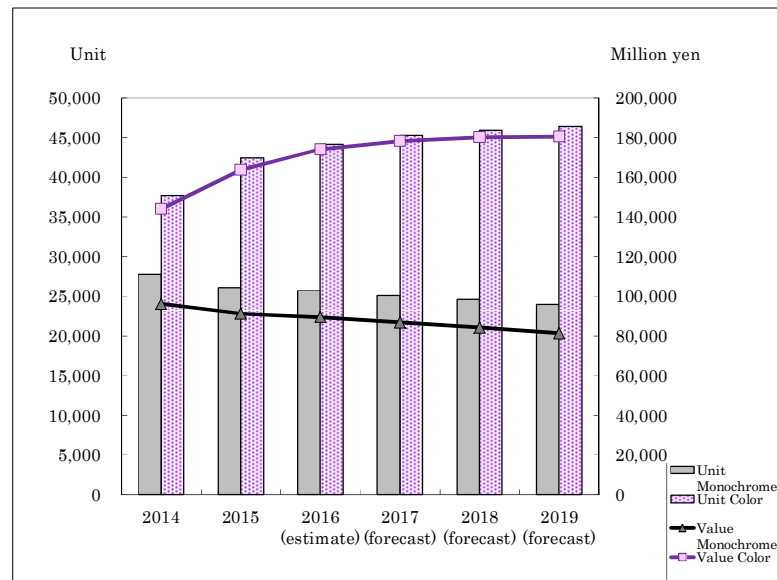
1. Office PPC (MFP) Market



Total shipments in 2015 decreased slightly; a large decrease in monochrome units was not covered by increased volume of color units. The same trend has been observed in 2016. The color shipment exceeded 50% for the first time in 2016.

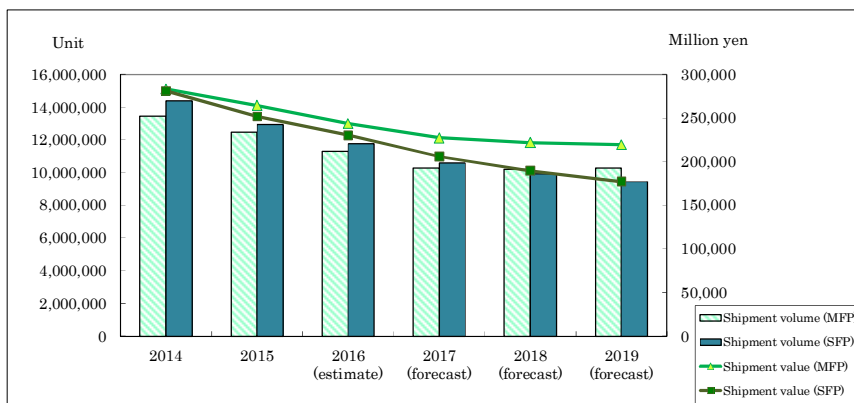
On the other hand, the overall shipment value increased slightly, due to a steady increase in color units in 2015. The same trend is expected to be seen in 2016 before the figure is going down slightly from 2017 onwards.

2. Production Printer (PP) Market



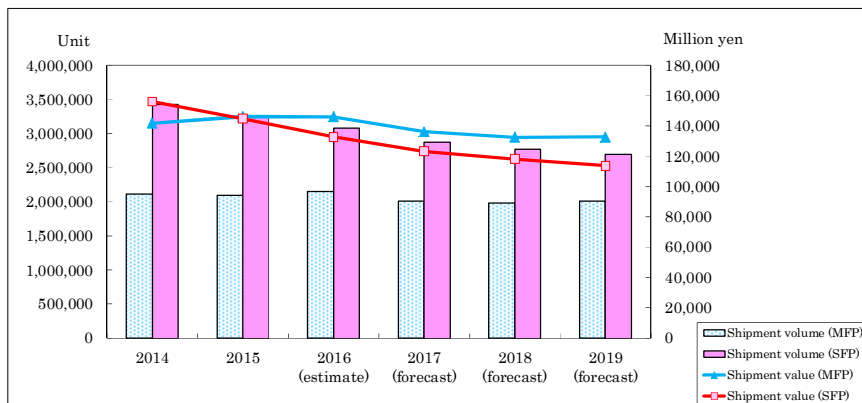
The production printer market is steadily growing. Although monochrome units are decreasing slightly, color units continue to grow in the light and middle ranges. This upward trend is likely to continue for a while, but more moderately.

3. Shipment trend of monochrome laser/LED printer (including MFP)



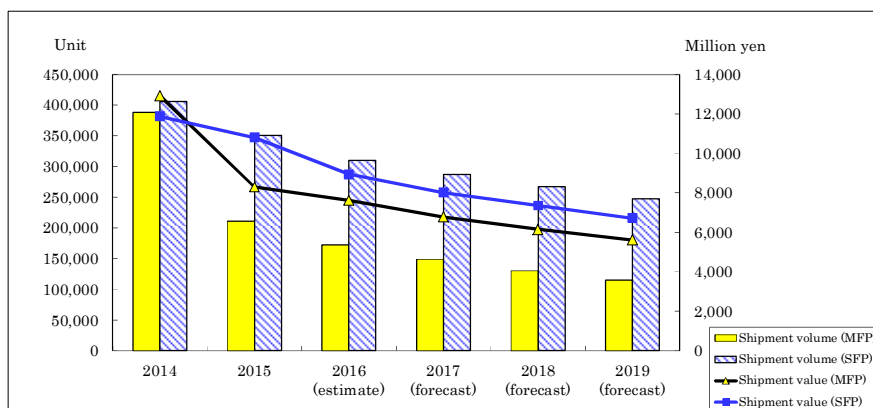
Shipment of monochrome printers keeps decreasing on a large scale. The shipment figure fell by five million units over the two years between 2015 and 2016. The downward trend is likely to continue, as the global printer market is becoming mature.

4. Shipment trend of color laser/LED printer (including MFP)



Likewise, shipment of color printers is becoming sluggish. It was on an upward trend until 2014, but is on a slightly downward trend after 2015.

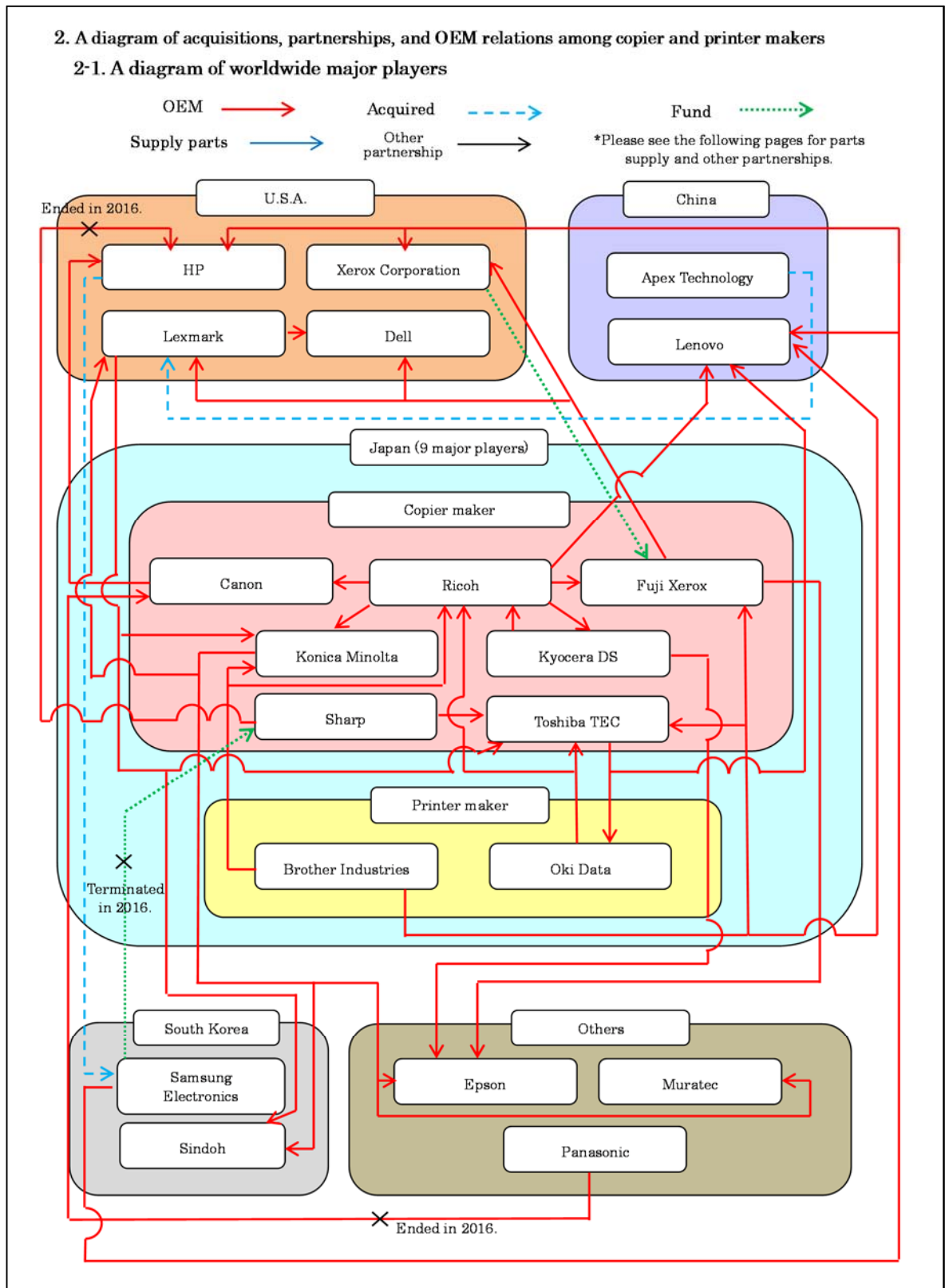
5. Shipment trend of FAX



FAX models are losing share significantly. They're now integrated into MFP models that come with FAX capabilities.

◆ Image of the contents ◆

Extract from < Comprehensive Analysis >



Extract from < PPC market >

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

15. Individual market share by output size and maker (volume)

1) Overall

(1) Overall digital PPC (monochrome+color)

	2014	2015	2016 (estimate)	2017 (forecast)	2018 (forecast)	2019 (forecast)	Unit
	%	%	%	%	%	%	
Canon							
Ricoh							
Fuji Xerox							
Sharp							
A Ricoh Document Solutions							
4 Toshiba TEC							
Konica Minolta							
Samsung / HP							
Total	%						
Canon							
Ricoh							
Fuji Xerox							
Sharp							
A Ricoh Document Solutions							
3 Toshiba TEC							
Konica Minolta							
Samsung / HP							
Total	%						
Sum total	%						

(2) Monochrome digital PPC

	2014	2015	2016 (estimate)	2017 (forecast)	2018 (forecast)	2019 (forecast)	Unit
	%	%	%	%	%	%	
Canon							
Ricoh							
Fuji Xerox							
Sharp							
A Ricoh Document Solutions							
4 Toshiba TEC							
Konica Minolta							
Samsung / HP							
Total	%						
Canon							
Ricoh							
Fuji Xerox							
Sharp							
A Ricoh Document Solutions							
3 Toshiba TEC							
Konica Minolta							
Samsung / HP							
Total	%						
Sum total	%						

(3) Color PPC

	2014	2015
	%	%
Canon		
Ricoh		
Fuji Xerox		
Sharp		
A Ricoh Document Solutions		
4 Toshiba TEC		
Konica Minolta		
Samsung / HP		
Total	%	
Canon		
Ricoh		
Fuji Xerox		
Sharp		
A Ricoh Document Solutions		
3 Toshiba TEC		
Konica Minolta		
Samsung / HP		
Total	%	
Sum total	%	

[B. PPC Market]

B-1. Data summary and analysis

1. Overall shipment volume

		2014	2015	2016 (estimate)	2017 (forecast)	2018 (forecast)	2019 (forecast)	Unit
		%	%	%	%	%	%	
Monochrome	Digital	MFP						
		SFP						
	Subtotal							
	Analog	MFP						
	SFP							
Total								
	%							
Color	Digital	MFP						
		SFP						
	Total							
	%							
Sum total	MFP							
	SFP							
	%							

MFP: Multi Function Product
SFP: Single Function Product

Extract from < Printer market >

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

3. Shipment volume by region

1) 2015

	2015 (result)										(Unit)	
	Japan		North America		Europe		China		Other regions		Total	
Monochrome		%		%		%		%		%		%
Color		%		%		%		%		%		%
Sum total		%		%		%		%		%		%

2) 2016

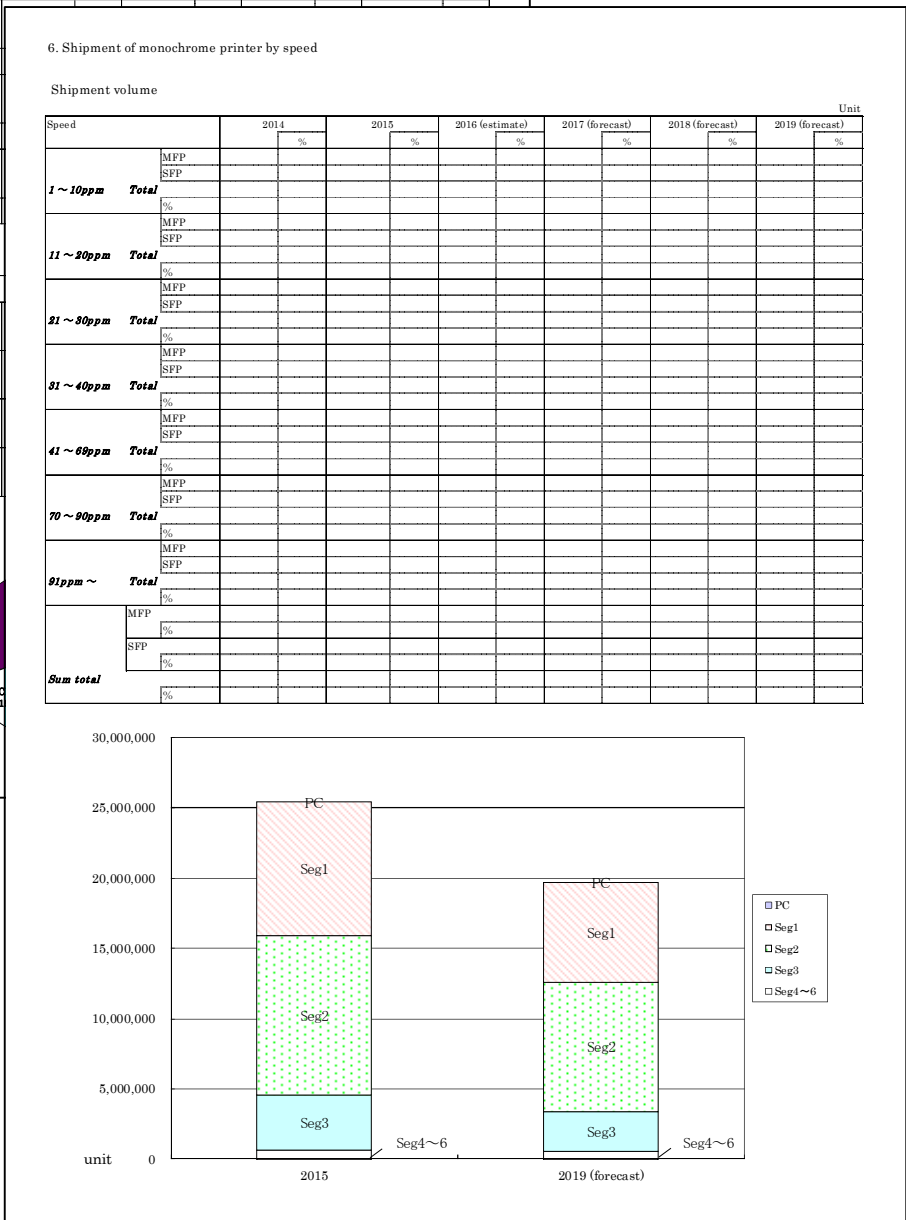
	2016 (estimate)										(Unit)	
	Japan		North America		Europe		China		Other regions		Total	
Monochrome		%		%		%		%		%		%
Color		%		%		%		%		%		%
Sum total		%		%		%		%		%		%

3) Growth rate in 2016/2015

	Growth rate	
	Japan	North America
Monochrome		
Color		
Sum total		

2015 (result)

- Japan: 2.8%
- North America: 19.5%
- Europe: 27.9%
- China: 19.8%
- Other regions: 30.2%



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

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

Year	PP	Japanese makers	Japan	Overseas	Total	%	2014	2015	2016	2017	2018	2019	Unit	
									(estimate)	(forecast)	(forecast)	(forecast)		
Color	PP	Japanese makers	Japan											
			Overseas											
			Total											
	C	Japanese makers	Japan											
			Overseas											
			Total											
Sum total														
Total														
Monochrome	PP	Japanese makers	Japan											
			Overseas											
			Total											
	C	Japanese makers	Japan											
			Overseas											
			Total											
Sum total														
Total														

*excluding continuous forms (please refer to the ind... section in the latest version.
Note: Canon has ended production of comprehensive layout... comprehensive layout models.

① Year-on-year shipments of production printing models for totaling up to 104.6%, backed by constant growth. Shipments of heavy production printers also remained unchanged as demand of color models is rising, though shipments of new models and their moves are stimulating the printing ind... several hundreds of units a year.

② Sales rate of hardware and non-hardware model

	Hardware (%)	Non-hardware (%)
Fuji Xerox	35	
Konica Minolta	40	
Ricoh	40	
Canon	40	

8. Network support and mobile support ratio

	Network	Mobile
Monochrome	80%	88%
Color	100%	100%

Network printing is not fully supported in some emerging countries.
Availability of mobile printing is almost the same as network printing.

9. Major OEM

1) OEM relation

(1) OEM from Brother Industries

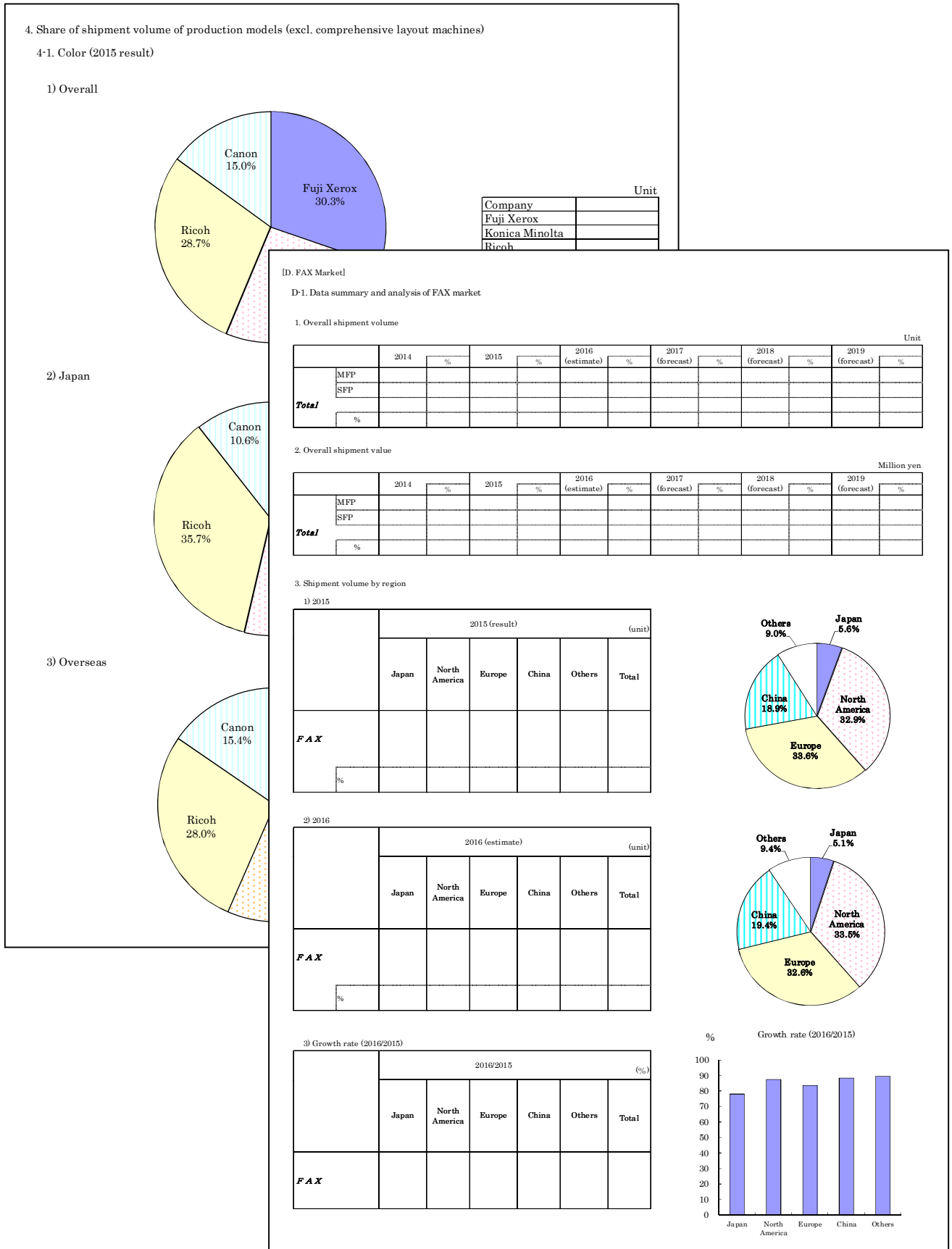
	OEM from Brother Industries
Monochrome	Lenovo "LJ2206/LJ2206W" (20ppm) "LJ2400/LJ2400L" (24ppm) "LJ2605D/LJ2655DN" (30ppm) "LJ3700D/LJ4000D/LJ3700DN/LJ4000DN" (40ppm) "LJ3800DN/LJ3800DW" (40ppm) "M1851" (20ppm/MFP), "M2041" (20ppm/MFP) "M2051" (20ppm/MFP), "M7206W" (20ppm/MFP) "M7216/M7216NWA" (20ppm/MFP), "M7255F" (20ppm/MFP) "M7256HF/M7256WHF" (20ppm/MFP) "M3410" (24ppm/MFP), "M3420" (24ppm/MFP) "M7400" (24ppm/MFP), "M7450F" (24ppm/MFP) "M7605D" (30ppm/MFP), "M7455DNF" (30ppm/MFP) "M7615DNA" (30ppm/MFP), "M7655DHF" (30ppm/MFP) "M7675DXF" (30ppm/MFP), "M8600DN" (36ppm/MFP) "M8650DN/M8900DNF/M8950DNF/M8960DNF" (40ppm/MFP)
	Fuji Xerox "DocuPrint P118w" (released in Feb. 2015/20ppm) "DocuPrint M118w/M118z" (released in Feb. 2015/20ppm/MFP) "DocuPrint P260dw/M260z" (released in Jul. 2015/Oct. 2015/30ppm/SFP/MFP)
	NEC "Multi Writer 5140" (26ppm) "Multi Writer 5150" (30ppm) "Multi Writer 200F" (30ppm/MFP)
	Toshiba TEC "e-STUDIO 240S" (24ppm) (2011.12-) targeted at the Chinese market
	Dell "E310dw" (released in May 2015/\$129/26ppm) "E515dn/E515dw/E514dw" (released in May 2015/\$199/\$219/\$179/26ppm/MFP)
	Konica Minolta "bizhub 20/20P" (Aug. 2010/\$499/\$299/32ppm/MFP)

① OEM supply of 20ppm and 30ppm models to Fuji Xerox began in February 2014 and July 2015 respectively. Fuji Xerox now receives all low-end models from Brother Industries as OEM models.

② OEM supply to Dell began in May 2015 by replacing "B1265dfw" (28ppm/MFP) of Samsung Electronics.

Extract from < Production Printing Market > < FAX market >

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



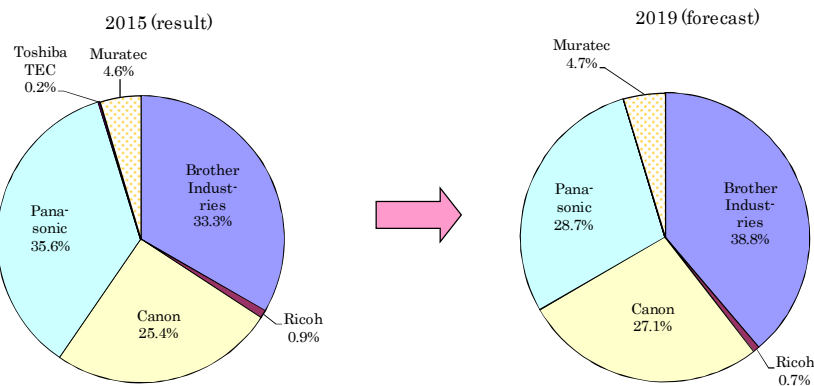
Extract from < FAX market >

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

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

1) Shipment volume

		2014		2015		2016 (estimate)		2017 (forecast)		2018 (forecast)		2019 (forecast)	
		%		%		%		%		%		%	
	MFP												
	SFP												
	%												
<i>Brother Industries</i>													
	MFP												
	SFP												
	%												
<i>Ricoh</i>													
	MFP												
	SFP												
	%												
<i>Canon</i>													
	MFP												
	SFP												
	%												
<i>Panasonic</i>													
	MFP												
	SFP												
	%												
<i>Toshiba TEC</i>													
	MFP												
	SFP												
	%												
<i>Muratec</i>													
	MFP												
	SFP												
	%												
Sum total													
	MFP												
	SFP												
	%												



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Canon / Ricoh / Fuji Xerox / Sharp / Kyocera Document Solutions / Toshiba TEC / Konica Minolta / Samsung Electronics / HP*	
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Canon / Brother Industries / Oki Data / Fuji Xerox / Kyocera Document Solutions / Ricoh / Konica Minolta / Casio Computer / Lexmark / Apex (Ninestar Group) / Samsung Electronics / HP (shipment volume and value of Samsung Electronics' existing engines) Panasonic System Networks / Apex Technology / Sindoh (formerly known as Sindo Ricoh) / Lenovo	
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