

Survey Report

*2023 version [Toner Market Forecast] *

“An Analysis of the Toner Industry’s Future: Adoption of Environmentally Conscious Technology to Survive the Industry”

=Latest Trend in Toner, Resin, and Other Materials=



Ricoh adopts new low-melting-point toner in its latest A3 color MFP (image: RICOH IM C6010)



HP's A4 color printer 4201dw equipped with the latest toner technology TerraJet (Canon engine)



Konica Minolta strengthens its PP toner, for which demand is expected to grow (image: the latest color PP AccurioPress C14000e)



<Overview>

I. Theme

*** 2023 version [Toner Market Forecast] ***

“An Analysis of the Toner Industry's Future: Adoption of Environmentally Conscious Technology to Survive the Industry”

= Latest Trend in Toner, Resin, and Other Materials =

II. Abstract

On May 5, the World Health Organization (WHO) announced the lift of a state of emergency regarding COVID-19, which lasted three years and three months since the end of January 2020. This also signals the start of the post-COVID era in a full scale this year.

In the MFP and printer industry, many companies return to office-based operations favoring face-to-face communication, and this is expected to lead to a recovery in office print volume and, ultimately, toner demand. However, the business world as a whole is quickly shifting toward digital transformation (DX) and is promoting paperless practices, making toner manufacturers develop business strategies based on the assumption that low growth will continue in both the genuine product and third-party product markets.

As the market matures, toner manufacturers will have no choice but to respond to various environmental regulations in addition to the traditional technological challenges of achieving both high image quality and low-temperature fusing capabilities. Specifically, many major toner manufacturers have introduced toner formulations that do not contain titanium dioxide as the substance was classified as carcinogenic in Europe (however, the EU General Court has annulled the classification on November 23, 2022.). In addition, some European countries are beginning to require the purchase of a certain percentage of remanufactured toner cartridges for government procurement. As for toner itself, full-scale efforts will begin to develop products based on environmentally friendly materials such as recycled resins and biomass raw materials. Although these green technologies with low environmental impact will be a heavy burden of costs on manufacturers, they cannot avoid this challenge in the midst of the global trends toward SDGs and decarbonization, and we believe that this will have a direct impact on manufacturers' toner business strategy to survive the industry.

We, Data Supply Inc., have been reporting on the latest developments in the “toner industry” for more than 30 years. In this latest version, we will continue to research and analyze the future of toner, resin, carrier, magnetic oxide, CCA, colorants, external additives, wax, and other related businesses from a professional and objective standpoint beyond generalized interpretation. We hope that the report will help readers striving to revive the industry.

III. Target Items and Makers

1. Target Items

1) Toner

(1) Pulverized toner (color and monochrome) (2) Chemically prepared toner (color and monochrome)

2) Toner resin: (1) Polyester-based resin (2) Styrene-acrylic-based resin (3) Others

3) Carriers 4) Magnetic oxide 5) Charge control agents (CCA) 6) Colorants for color toner

7) External additives 8) Carbon black 9) Toner wax 10) Other related items

2. Target makers

1) Major makers

Toner makers (68 companies in Japan and abroad; including three outsourced processing makers) /

Toner resin makers (18) / Carrier makers (4) / Magnetic oxide makers (5) / CCA makers (8) /

Colorant makers (9) / External additives makers (14) / Carbon black makers (3) / Wax makers (8)

2) Other related makers

IV. Research Period and Methodology

1. Research Period: From 2021 to 2027

2. Methodology: (1) On-site and in-person interviews with target makers

(2) Analysis and review of open literatures, materials, statistics, and other sources

(3) Analysis of Data Supply's own proprietary database

V. Format and Report Preparation Period

1. Research Form: This is a multi-client study.

2. Research Period: From May to mid-June, 2023

3. **Publication Date** (A4 size PDF format): **July 28, 2023 (English version)**

4. **How to Apply:** Please apply via email. Please indicate your company name, department, office phone number, and your name in your email and send it at infods@datasupply.jp

5. **Price:** ¥6,000 (English version)

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Homepage: [http://www.datasupply.jp/index\(english\).html](http://www.datasupply.jp/index(english).html)

Excerpt from "Comprehensive Analysis"

(Actual figures and comments are shown in the full version.)

4) Changes in production volume by manufacturing method and type (2021-2027)

			Year							Unit: ton
			2021	2022	2023 (estimate)	2024 (forecast)	2025 (forecast)	2026 (forecast)	2027 (forecast)	%
Pulverized toner	Dual component	Monochrome								
		Color								
		Total								
	Non-magnetic mono component	Monochrome								
		Color								
		Total								
	Magnetic mono component	Monochrome								
		Color								
		Total								
	Total									
		%								
Chemically prepared toner	Dual component	Monochrome								
		Color								
		Total								
	Non-magnetic mono component	Monochrome								
		Color								
		Total								
	Magnetic mono component	Monochrome								
		Color								
		Total								
	Total									
		%								

A. Comprehensive Analysis

1. Worldwide trend in toner production

1) Changes in overall production volume/production value by Japanese/overseas maker (2021-2027)

		2021	2022	2023 (estimate)	2024 (forecast)	2025 (forecast)	2026 (forecast)	2027 (forecast)	Unit: ton
		%	%	%	%	%	%	%	%
Production volume by Japanese makers									
Production volume by overseas makers									
Total									

		2021	2022	2023 (estimate)	2024 (forecast)	2025 (forecast)	2026 (forecast)	2027 (forecast)	Unit: million yen
		%	%	%	%	%	%	%	%
Production value by Japanese makers									
Production value by overseas makers									
Total									

As for production volume of pulverized toner/chemically prepared toner and the latter for 51,780 tons (31.2% of the total)

SAMPLE

Excerpt from "Resin market" and "Carrier market"

(Actual figures and comments are shown in the full version.)

3) Changes in production volume by type and maker (2021-2027)

(1) Iron powder carrier

Unit: ton

	2021		2022		2023 (estimate)		2024 (forecast)		2025 (forecast)		2026 (forecast)		2027 (forecast)	
		%		%		%		%		%		%		%
Powdertech														
Kanto Denka Kogyo														
Dowa Electronics														
Total														

(2) Ferrite carrier

Unit: ton

	2021		2022		2023 (estimate)		2024 (forecast)		2025 (forecast)		2026 (forecast)		2027 (forecast)	
		%		%		%		%		%		%		%
Powdertech														
Kanto Denka Kogyo														
Dowa Electronics														
Total														

(3) Magnetite carrier

	2021	
		%
Powdertech		
Kanto Denka Kogyo		
Dowa Electronics		
Total		

(4) Resin carrier

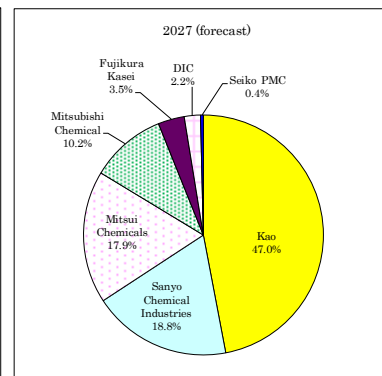
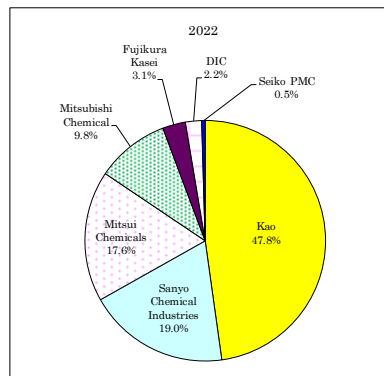
	2021	
		%
Toda Kogyo		

3) Production trend by maker (2021-2027)

(1) Overall

Unit: ton

	2021		2022		2023 (estimate)		2024 (forecast)		2025 (forecast)		2026 (forecast)		2027 (forecast)	
		%		%		%		%		%		%		%
Sanyo Chemical Industries														
Fujikura Kasei														
Mitsui Chemicals														
Mitsubishi Chemical														
DIC														
Kao														
Seiko PMC														
Total														



Excerpt from "CCA market", "Colorant market", "External additives market", and "Carbon black market"

(Actual figures and comments are shown in the full version.)

Carbon black market

6. Carbon black market
1) Changes in production volume/production value of carbon black (2021-2027)

	2021	2022	2023 (estimate)	2024 (forecast)	2025 (forecast)	2026 (forecast)	2027 (forecast)
Production volume (ton)	Pulverized toner						
	Chemically prepared toner						
	Total						
Production value (million yen)	Pulverized toner						
	Chemically prepared toner						
	Total						

External additives market

8) Changes in production volume by maker and type (2021-2027)
(1) Production volume

Maker	2021		2022		2023 (estimate)		2024 (forecast)		2025 (forecast)		2026 (forecast)		2027 (forecast)	
	Unit: ton	%	Unit: ton	%	Unit: ton	%	Unit: ton	%	Unit: ton	%	Unit: ton	%	Unit: ton	%
Evonik														
Cabot														
Shin-Etsu Chemical														
Tokuyama														
Wacker														
Silica														
Evonik														
Cabot														
Titan Kogyo														
Tayca														

Colorant market

(3) Supply relationships of colorant makers

	Dainichi seika Color & Chemicals Mig.	Heubach	Sanyo Color Works	Toyo Color	DIC	BASF	Fuji Pigment	Takyo Shikimi Industry	Daido Chemical Industry
Canon									
Ricoh									
FUJIFILM Business Innovation									
Konica Minolta									
Kyocera Document Solutions									
Sharp									
Toshiba TEC									
Tomogawa									
Mitsubishi Chemical									
Kao									
FDK									
Zeon									
Sakata Inx									
Imex									
Kodak									
Xerox									
Lotte Fine Chemical (formerly known as Samsung Electronics)									
Others									

CCA market

3. CCA market
1) Changes in production volume by type (2021-2027)
(1) Production volume

Type	2021		2022		2023 (estimate)		2024 (forecast)		2025 (forecast)		2026 (forecast)		2027 (forecast)	
	Unit: ton	%	Unit: ton	%	Unit: ton	%	Unit: ton	%	Unit: ton	%	Unit: ton	%	Unit: ton	%
Positive	Nigrosine													
	Colorless / White Resin													
	Total													
Negative	Colored													
	Colorless / White Resin													
	Total													
Total														

(2) Production value

Type	2021		2022		2023 (estimate)		2024 (forecast)		2025 (forecast)		2026 (forecast)		2027 (forecast)	
	Unit: million yen	%	Unit: million yen	%	Unit: million yen	%	Unit: million yen	%	Unit: million yen	%	Unit: million yen	%	Unit: million yen	%
Positive	Nigrosine													
	Colorless / White Resin													
	Total													
Negative	Colored													
	Colorless / White Resin													
	Total													
Total														

2) Major carbon black makers

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[1] Canon [2] Ricoh [3] Fujifilm Business Innovation [4] Konica Minolta [5] Kyocera Document Solutions [6] Sharp [7] Toshiba TEC [8] Tomoegawa [9] Mitsubishi Chemical [10] Kao [11] FDK [12] Sakata Inx [13] Imex [14] Zeon [15] Mikasa Sangyo [16] Others: [16]-1 OKI [16]-2 Daito Chemix

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《Items common among makers》

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 *English name is not known.

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《Items common among makers》

Changes in production volume by region and type/Changes in production value by region and type/Supply volume to toner makers by type of resin/Volume by OEM and third party/ Response to chemically prepared toner/Production base (Japan/overseas)/Facility investment and changes in R&D spending/Company profile

[1] Sanyo Chemical Industries [2] Fujikura Kasei [3] Mitsui Chemicals [4] Mitsubishi Chemical [5] DIC [6] Kao [7] Seiko PMC [8] Other makers: 1) Nippon Carbide Industries (Japan) 2) Tianjin Synthetic Material Research Institute (China) 3) Zhangjiagang Weidisen Chemical (China) 4) Hubei Yutian Technology (China) 5) Hubei Yuandong Gaoxin Materials Technology (China) 6) Jadi Imaging Technologies (Malaysia) 7) Wuhan Hanhu Polymer Material (China) 8) Wuxi Jiateng Magnetic Powder (China) 9) Wuxi Meiling Digital Science and Technology (China) 10) Handan City New Toner Resin Limited Company (China) 11) Samyang Corporation (South Korea) 12) Shiva Performance Materials (India)

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* Back numbers of the Toner Market Forecast Report *

*The toner report (English version) has been available since 1989.

1. September, 2007
"Future Aspects of Toner for High-speed Printers and POD, and Related Materials"
2. September, 2008
"Structure Analysis of Toner Market Transformed by Newly Introduced Chemically Prepared Toner"
3. September, 2009
"Structure Analysis of Toner And Related Market Facing an Emergence of Major CPT Manufacturers"
4. September, 2010
"Amid Dwindling Specialized Toner Manufacturers: Comprehensive Breakdown of Toner and Related Markets"
5. March, 2011
"Recovery from 3.11 on the Toner Industry Long Time Forecast for Toner and Related Market"
6. September, 2012
"Strategy of the Toner Industry in a Slow-growth Market"
7. September, 2013
"Forecast of the Toner Industry that Counts on Newly Emerging Countries"
8. September, 2014
"Forecast of the Toner Industry Lead by Ultrafine Particle Toner"
9. September, 2015
"Toner Industry Revitalizes the Market through the Provision of Value-added Toners"
10. October, 2016
"Outlook for the Toner Industry that Will Continue to Strive for Excellence in High-quality Toner Products"
11. October, 2017
"Future Prospects of the Toner Industry: A Call for Cost Competitiveness to Recreate the Market"
12. October, 2018
"The Future of the Toner Industry Challenged by Environmental Issues"
13. October, 2019
"The Future of the Toner Industry: The Safe and Sound Operation Required"
14. October, 2020
"Toner Business Outlook: Toner as the Heart of the Office Equipment"
15. August, 2021
"Latest Trend of the Changing Toner Market in Association with Diversifying Workstyles"
16. August, 2022
"Comprehensive Analysis of the Toner Market in the Hybrid Work Era"