

## Market Report

\* 2024 version [Toner Market Forecast] \*

**“A Comprehensive Analysis  
of the Toner Industry  
Moving Toward Industry  
Restructuring”**

= The latest trends in toner, resin, and other materials =



Ricoh establishes ETRIA, a joint venture with Toshiba TEC (Image: Ricoh Numazu Plant: South Plant)



FUJIFILM Business Innovation and Konica Minolta begin talks on toner business partnership  
(Left image: Toyama Center of FUJIFILM Manufacturing; Right image: Tatsuno Factory of Konica Minolta Supplies)

\*Image courtesy of Google



Data Supply Inc.  
August 2024

<Overview>

## I. Theme

### \* 2024 version [Toner Market Forecast] \*

“A Comprehensive Analysis of the Toner Industry Moving Toward Industry Restructuring”

= *The latest trends in toner, resin, and other materials* =

## II. Abstract

Since 2020, the office print volume (PV) of major companies' devices in developed countries has remained at 80 to 85% of the level before COVID-19, and it will no longer be possible to see it rise to the levels before the pandemic. In fact, the advancement of paperless trends and DX is likely to accelerate the decline of PV, **forcing toner manufacturers to adopt business strategies based on the assumption that low growth will continue in both the genuine and third-party product markets.**

As the overall market matures, industry restructuring is also becoming apparent. Ricoh and Toshiba TEC will launch a new company, ETRIA, in July 2024 to integrate their development and production functions of office MFPs. In addition, FUJIFILM Business Innovation and Konica Minolta have begun talks to form a business alliance in the MFP, office printer, and production printer businesses. They are also expected to integrate their raw materials and parts procurement functions and form a business alliance in toner development and production. **Behind the reorganization among Japanese manufacturers is the shared sense of crisis that they may lose the market to Chinese manufacturers if they keep competing among themselves.** From a managerial perspective, it could be a risk for manufacturers with small production scales to continue development and production on their own as demand tapers off. In fact, **it is becoming a heavy burden for toner manufacturers to deal with a range of issues, such as environmental and safety concerns while their toner productions are declining.** As a result, momentum among manufacturers to form alliances has never been greater in order to **address supply chain risks.**

The report presents **our thorough analysis of the latest trends in the toner industry now set to restructure itself.** As in the previous reports, our detailed research and analysis covers toner raw materials including resin, carrier, magnetic materials, colorants, external additives, carbon black, and wax. We hope that our latest report will be of help to those in the industry in planning future strategies.

## 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) Carrier 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 (66 companies in Japan and abroad) / Toner resin makers (18) / Carrier makers (4) / Magnetic oxide makers (5) / CCA makers (8) / Colorant makers (8) / External additives makers (14) / Carbon black makers (3) / Wax makers (8)

#### 2) Other related makers

## IV. Research Period and Methodology

### 1. Research Period: From 2022 to 2028

### 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, 2024

### 3. Publication Date (PDF format): August 16, 2024 (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](mailto:infods@datasupply.jp)

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

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# SAMPLE

## Excerpt from "Comprehensive Analysis"

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

3) Changes in production volume by application and component (2022-2028)

Application / Toner Type		2022	2023	2024 (estimate)	2025 (forecast)	2026 (forecast)	2027 (forecast)	2028 (forecast)	Unit: ton	
		%	%	%	%	%	%	%		%
Monochrome	PP	Dual component								
		Non-magnetic mono component								
		Magnetic mono component								
		Total								
		%								
	MFP	Dual component								
		Non-magnetic mono component								
		Magnetic mono component								
		Total								
		%								
	Printer	Dual component								
	/FAX	Non-magnetic mono component								
	Magnetic mono component									
	Total									
	%									
	Dual component									
	%									
	Non-magnetic mono component									
	%									
	Magnetic mono component									
	%									
Total										

4) Changes in production volume by manufacturing method and type (2022-2028)

Year			2022	2023	2024 (estimate)	2025 (forecast)	2026 (forecast)	2027 (forecast)	2028 (forecast)	Unit: ton	
			%	%	%	%	%	%	%		%
Pulverized toner	Dual component	Monochrome									
		Color									
		Total									
	Non-magnetic mono component	Monochrome									
		Color									
		Total									
	Magnetic mono component	Monochrome									
		Color									
		Total									
	Total	Monochrome									
		Color									
		%									
Chemically prepared toner	Dual component	Monochrome									
		Color									
		Total									
	Non-magnetic mono component	Monochrome									
		Color									
		Total									
	Magnetic mono component	Monochrome									
		Color									
		Total									
	Total	Monochrome									
		Color									
		%									
Total	Dual component	Monochrome									
		Color									
		Total									
	Non-magnetic mono component	Monochrome									
		Color									
		Total									
	Magnetic mono component	Monochrome									
		Color									
		Total									
	Total	Monochrome									
		Color									
		%									

2023

Manufacturing Method	Volume (ton)	Percentage
Pulverized toner	109,133	69.0%
Chemically prepared toner	49,040	31.0%

2028 (forecast)

Manufacturing Method	Volume (ton)	Percentage
Pulverized toner	106,795	68.1%
Chemically prepared toner	50,080	31.9%

\*Black toner for color includes black toner). The shipment ratio by The shipment ratio by 31.5%.

# SAMPLE

## Excerpt from "Comprehensive Analysis" and "Toner market"

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

### 5) Changes in overall production volume by maker (2022-2028)

	Unit: ton						
	2022	2023	2024 (estimate)	2025 (forecast)	2026 (forecast)	2027 (forecast)	2028 (forecast)
Canon	%	%	%	%	%	%	%
Ricoh	%	%	%	%	%	%	%
FUJIFILM Business Innovation	%	%	%	%	%	%	%
Konica Minolta	%	%	%	%	%	%	%
Kyocera Document Solutions	%	%	%	%	%	%	%
Sharp	%	%	%	%	%	%	%
Toshiba TEC	%	%	%	%	%	%	%
Tomoegawa Corporation	%	%	%	%	%	%	%
Mitsubishi Chemical	%	%	%	%	%	%	%
Kao	%	%	%	%	%	%	%
FDK	%	%	%	%	%	%	%
Sakata Inx	%	%	%	%	%	%	%
Imex	%	%	%	%	%	%	%
Zeon	%	%	%	%	%	%	%
Mikasa Sangyo	%	%	%	%	%	%	%
Total	%	%	%	%	%	%	%

In 2023, 11 out of 15 Japanese inventory buildup over the genuine product makers.

### (2) Production volume by application and by OEM/third party (2022-2024)

		Unit: ton		
		2022	2023	2024 (estimate)
Monochrome PP toner	OEM			
	Third party			
	Total			
	Third party ratio			
Monochrome MFP toner	OEM			
	Third party			
	Total			
	Third party ratio			
Monochrome printer toner	OEM			
	Third party			
	Total			
	Third party ratio			
Total of toner for monochrome use	OEM			
	Third party			
	Total			
	Third party ratio			
Color PP toner	OEM			
	Third party			
	Total			
	Third party ratio			
Color MFP toner	OEM			
	Third party			
	Total			
	Third party ratio			
Color printer toner	OEM			
	Third party			
	Total			
	Third party ratio			
Total of toner for color use	OEM			
	Third party			
	Total			
	Third party ratio			
Total	OEM			
	Third party			
	Total			
	Third party ratio			

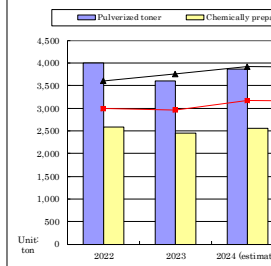
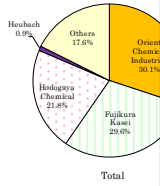
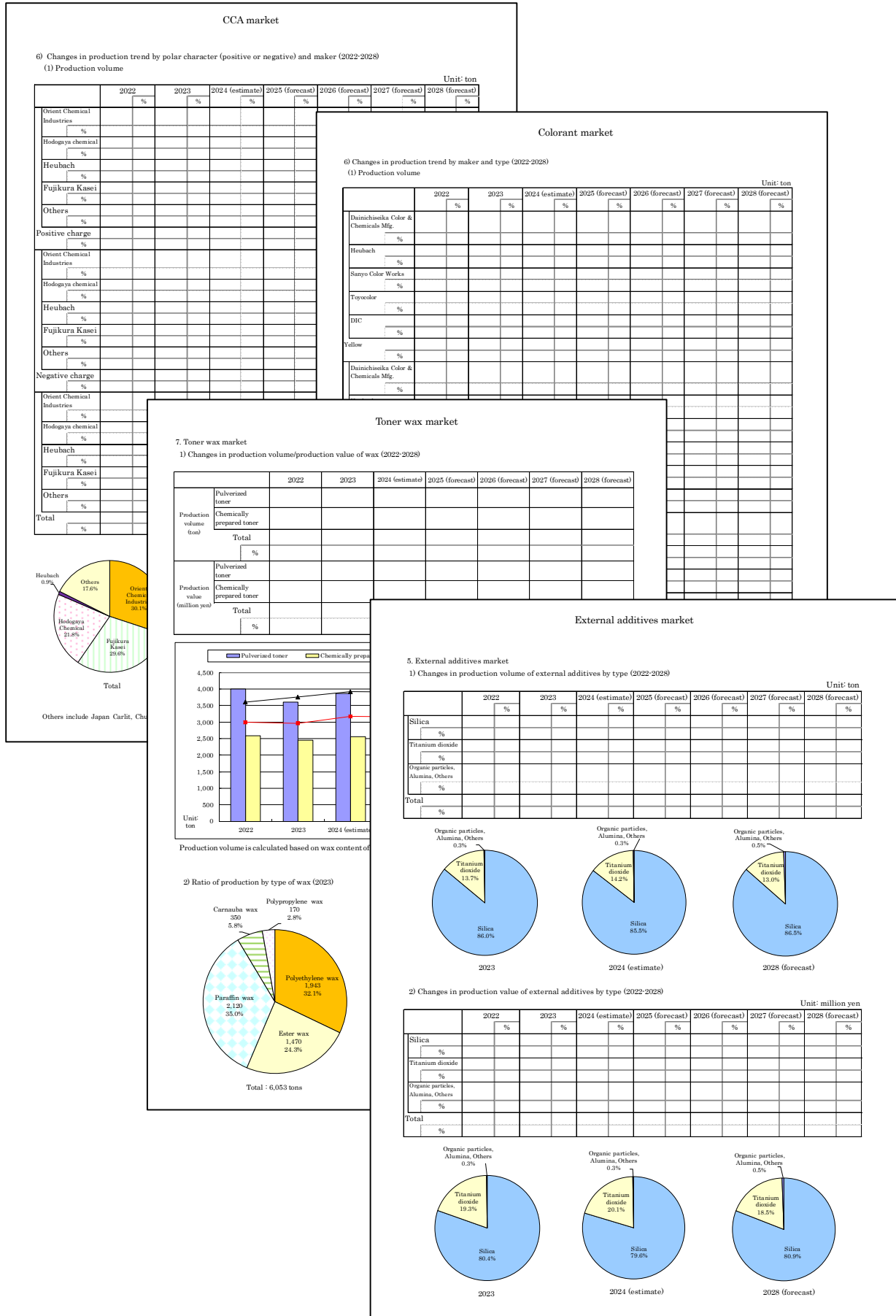
\*Color toner in the table includes black toner for color machines, in addition to Y/M/C toners. The definition of the color toner on page two and others are Y/M/C toners only.

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 .....  
 .....  
 .....  
 .....

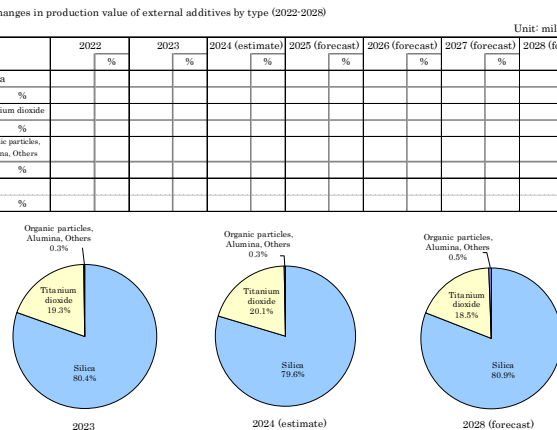
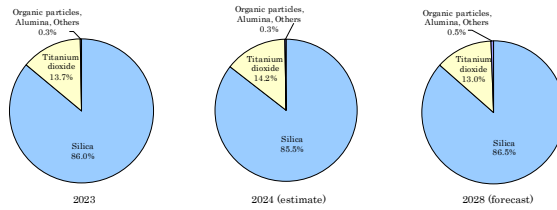
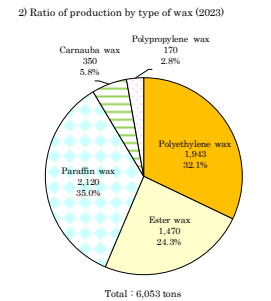


## Excerpt from "CCA market", "Colorant market", "External additives market", and "Toner wax market"

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



Production volume is calculated based on wax content of



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《Items common among makers》

Changes in production volume by application and component (production volume in Japan/production volume overseas)/Breakdown of production by plant/Breakdown of overseas production by region/Production volume by manufacturing method and type/Production volume and production value of toner/R&D trend in toner (Chemically prepared toner/Pulverized toner/Environmentally friendly products (remanufactured resin, biomass materials, low-temperature fusing, response to PFAS, etc.)/Development trend in value-added toners (gold, silver, white, clear, fluorescent)/Production volume by component and type, and purchase volume of resin by type/Production volume by color and particle size/Breakdown of production volume and production value by office and professional use/Changes in production volume by user (2022-2024/Breakdown of production volume by OEM and third party)/Trend in production and development bases/Facility investment and changes in R&D spending/Company profile

[1] Canon [2] Ricoh [3] FUJIFILM Business Innovation [4] Konica Minolta [5] Kyocera Document Solutions [6] Sharp [7] Toshiba TEC [8] Tomoegawa Corporation (formerly Tomoegawa Paper) [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》

Changes in production volume by application and component/Production volume by manufacturing method and type/Breakdown of production volume and production value by office and professional use/Production volume for OEM and third party/Company profile

[1] CET Group (China) [2] Cosmo AM & T (South Korea) [3] Excellent Color Technology (HuBei) (China) [4] Handan Hanguang OA Toner (China) [5] Hubei Dinglong (China) [6] Indian Toners & Developers Ltd (India) [7] Jadi Imaging Technologies Sdn Bhd (Malaysia) [8] Kodak (U.S.A.) [9] Lexmark International (U.S.A.) [10] Lotte Fine Chemical (South Korea) [11] Nanjing Teshine Imaging Technologies (China) [12] Tianjin Synthetic Material Research Institute (China) [13] Trend Tone Imaging (Taiwan) [14] Xeikon (Belgium) [15] Xerox Corporation (U.S.A.) [16] Other makers: 1) Cangzhou ASC Toner Production (China) 2) Cangzhou HuiBao Toner Production (China) 3) Fujian Meihong Technology (China) 4) Ganzhou Ninevalley Technology (China) 5) Guangdong VIVID Print Material (China) 6) Guangzhou Auking Digital Technology Enterprise (China) 7) Guangzhou Cetron Office Equipment (China) 8) Guangzhou Shuangyi Sci-technology (China) 9) Guizhou Brothers Union Technology (China) 10) Hubei East Toner New Materials (China) 11) Hubei Sincore Toner Digital Technology (China) 12) Huinon Toner Industrial (China) 13) Hunt Imaging (U.S.A.) 14) HYB TONER (China) 15) ICMI China (China) 16) Integral (Germany) 17) IPM (Imaging Products Manufacturing) (Turkey) 18) Naghsh Ayandegan Abyaneh (Iran) 19) Pure Toners & Developers (India) 20) Raven Industries (U.S.A.) 21) Real Color Corporation (China) 22) Royal Precision Technology (Taiwan) 23) Tianjin Zhonghuan TCOA Electronics (China) 24) Tinbinh (Vietnam) 25) Troy Group Inc. (U.S.A.) 26) Union Chemical (South Korea) 27) Wuhan Zongxiang Imaging (China) 28) Wuxi Jiateng Magnetic Powder (China) 29) Wuxi Meiling Digital Science and Technology (China) 30) Xinyin Kaier New Material (China) 31) Yvian Technology (Zhuhai) (China) 32) Zhongshan Rainmiu Office Technology (China) 33) Zhuhai Guocai Technology (China) 34) 湖北亿隆新材料科技有限公司 (China) *English name is not available.	
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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) Tianjin Synthetic Material Research Institute (China) 2) Zhangjiagang Weidisen Chemical (China) 3) Hubei Yutian Technology (China) 4) Hubei Yuandong Gaoxin Materials Technology (China) 5) Jadi Imaging Technologies (Malaysia) 6) Wuhan Hanhu Polymer Material (China) 7) Wuxi Jiateng Magnetic Powder (China) 8) Wuxi Meiling Digital Science and Technology (China) 9) Handan City New Toner Resin Limited Company (China) 10) Samyang Corporation (South Korea) 11) 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  
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