

Multi-Client Study

Research Proposal

[2025 version of Roller and Roller-related Market Forecast]

"Strategies and Outlook for the Components Industry in an Era of Uncertainty and Transformation"

*=Detailed survey of production and shipment trends in rollers, belts, blades,
and other functional parts =*



April 2025
Data Supply Inc.

<Overview>

I. Theme

[2025 version of Roller and Roller-related Market Forecast]

"Strategies and Outlook for the Components Industry in an Era of Uncertainty and Transformation"

=Detailed survey of production and shipment trends in rollers, belts, blades, and other functional parts=

II. Abstract

The market for functional components used in MFPs and laser printers—including rollers, belts, and blades—had already **reached a substantial scale before the COVID-19 pandemic, with over 1.5 billion units shipped annually and a total shipment value of around 200 billion yen.** However, since 2020, the industry has faced a prolonged downturn in demand due to declining print volumes. As of now, total demand has **fallen to approximately 80–85% of the 2019 level, indicating a steady deterioration in the industry's overall foundation.** **The global political and economic landscape is also expected to grow increasingly uncertain,** particularly with the re-election of President Trump. This uncertainty will likely have a direct impact on the MFP and printer industries as well.

While demand across the industry continues to stagnate, rising raw material and energy costs have pushed up production expenses. Nevertheless, many suppliers have been unable to sufficiently pass on these increased costs, **leading to a gradual erosion of the vitality of the roller and belt sector.** Over the past few years, under sustained and intense competitive pressure, several major companies—including Kaneka, Bridgestone, and Hitachi Metals—have exited the office equipment components sector. The situation remains highly volatile, with **the potential for further large-scale structural changes within the components industry.**

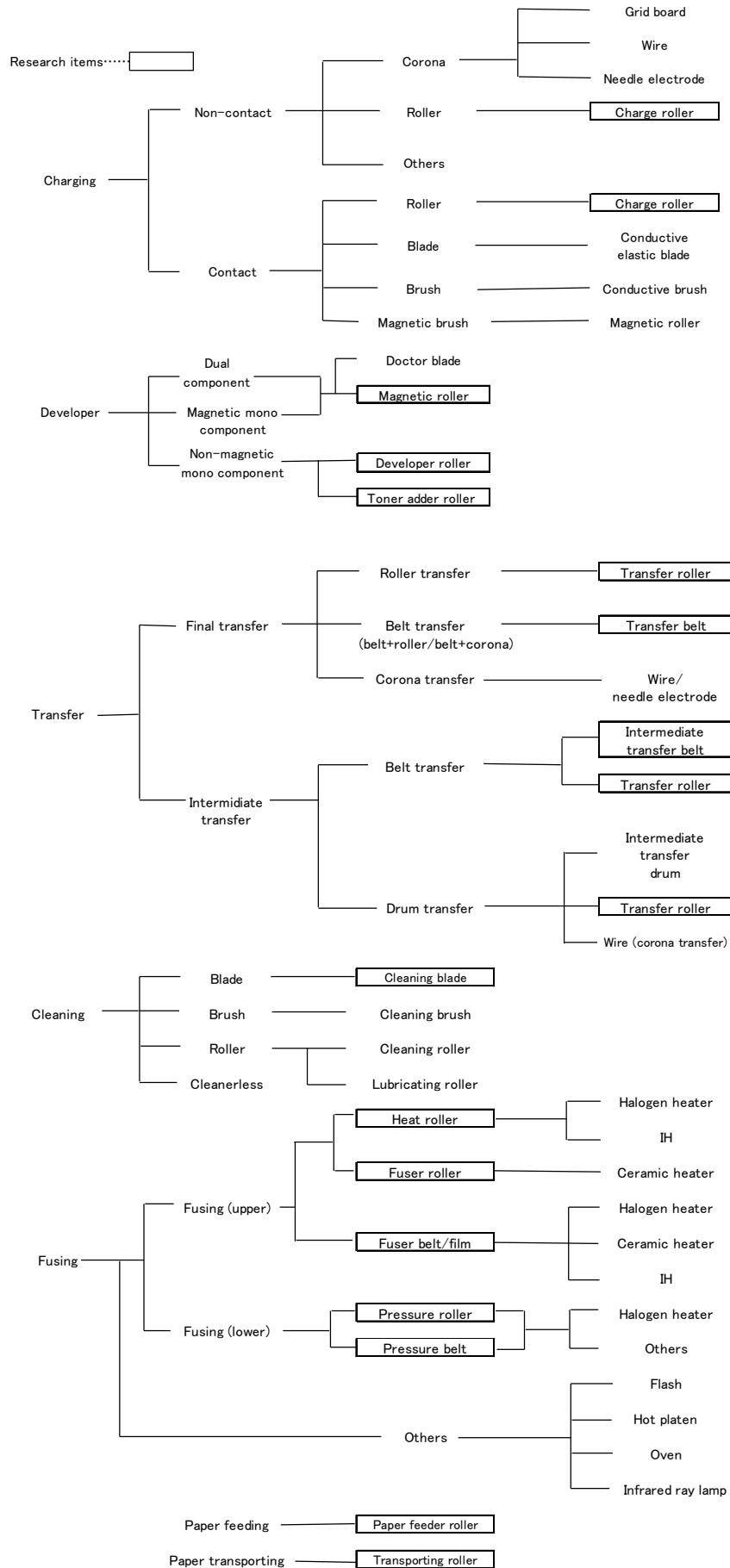
At the same time, MFP and printer manufacturers are accelerating efforts toward industry consolidation. Examples include "ETRIA," a newly formed alliance comprising Ricoh, Toshiba TEC, and OKI; "Global Procurement Partners," a joint procurement initiative by FUJIFILM Business Innovation and Konica Minolta; and, on the international front, Xerox's announcement of its intent to acquire Lexmark. These moves point to a growing trend of industry realignment on a global scale. **For component manufacturers, this consolidation presents both risks and opportunities.** On the one hand, it is expected to reduce the number of product development projects across the industry. On the other hand, as manufacturers restructure their supply chains to support jointly developed engines, new business opportunities may emerge for certain component suppliers.

In this climate of uncertainty and change, what strategies and outlooks are critical for component manufacturers? Beyond pricing flexibility and technological capability—both essential in their own right—**manufacturers must also offer a sense of stability to MFP and printer manufacturers by demonstrating a commitment to remain in the market over the long term.** In an industry no longer characterized by steady growth, survival increasingly depends on a company's overall competence: the ability to balance cost competitiveness and technological expertise with a robust operational foundation. This includes financial health, strengthened risk management, and stable yet adaptable business operations.

This report provides a comprehensive analysis of both dedicated and in-house component manufacturers in Japan and overseas, categorized by functional process—charging, developing, transferring, fusing, cleaning, paper feeding and transporting. **This is the 20th edition of our Roller and Roller-related Market Forecast.** As with previous editions, we aim to go beyond conventional interpretations, offering specialized and objective analysis of industry trends. We hope this report will serve as a valuable resource for industry stakeholders as they formulate future strategies.

III. Items and Makers

1. Items



2. Makers

2-1. Specialized roller makers

Japanese makers **(32)** / South Korean makers **(9)** / Chinese makers **(48)** / Hong-Kong makers **(1)** / Taiwanese makers **(2)** / others **(6)** / In-house makers **(5)** **(103 makers in total)**

2-2. Hardware machine makers **(major 15 makers)**

MFP makers / Printer makers

IV. Scope and Methodology

1. Scope of the research

From 2022 to 2028

2. Research methodology

- 1) Direct interviews (including online interviews) with target makers
- 2) Analysis of publicly available literature, documents, and statistics
- 3) Use of proprietary data accumulated by our company

V. Research Format, Period, and Other Details

1. Research format: Multi-client study

2. Research period: March and April 2025

3. Report publication date: **Available upon request**

4. Report format: PDF

5. Price: **\$5,000-**

6. Researchers

Mr. Yukio YAMAMOTO, Mr. Kosuke YOSHIDA, and Mr. Masafumi HARIU

Phone: +81-3-3831-9201

Fax: +81-3-3831-9204

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

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

7. How to order:

Please contact any of the researchers listed above or Data Supply Inc. at <infods@datasupply.jp>

VI. Survey Items

VI-1. Comprehensive Analysis

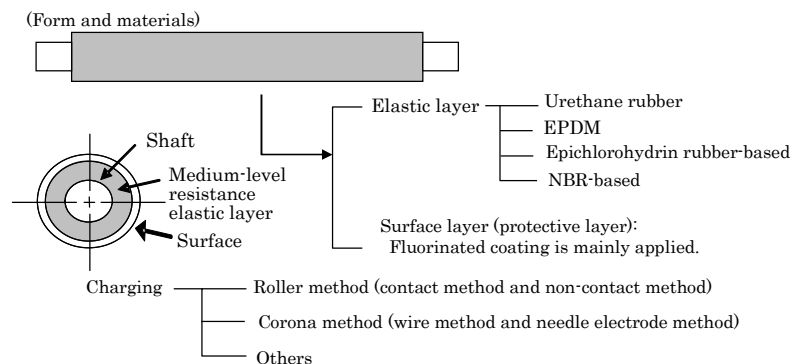
1. Market trends by component
 - 1-1. Shipment volume/shipment value by maker (specialized/in-house) (2022-2028)
 - 1-2. Market trends by application (monochrome PPC/printer and color PPC/printer) and by size (A3/A4) (2024/2028)
 - 1-3. Market trends by material
Shipment volume/shipment value
 - 1-4. Technology and material trends by component
 - 1-5. Production printer and wide-format printer component suppliers
 - 1-6. Price trends/product lifespan
 - 1-7. List of major customers
 - 1-8. Production sites by component and maker
 - 1-9. Revenue breakdown: electrophotographic rollers vs. others (inkjet, ATM, etc.)
 - 1-10. Impact of industry restructuring on the component sector *New section**
2. List of makers entering the rollers and roller-related component market
3. Number of roller components used per system type
4. Latest adoption trends by process and maker (monochrome machine/color machine)
Charging/exposure/development/transfer/fusing/cleaning
5. Shipment volume of hardware machines by maker (2024)
 - 1) Copiers (monochrome/color)
 - (1) Hardware with dual-component development
 - (2) Hardware with magnetic mono-component development
 - 2) Laser/LED printers (monochrome/color)
 - (1) Hardware with dual-component development
 - (2) Hardware with non-magnetic mono-component development
 - (3) Hardware with magnetic mono-component development
 - 3) Production printers (monochrome/color)
 - (1) Hardware with dual-component development
 - (2) Hardware with magnetic mono-component development
 - 4) Fax
 - (1) Hardware with dual-component development
 - (2) Hardware with non-magnetic mono-component development
 - (3) Hardware with magnetic mono-component development
6. Production sites of system makers/component makers in China and Southeast Asia (table)

VI-2. Component Market

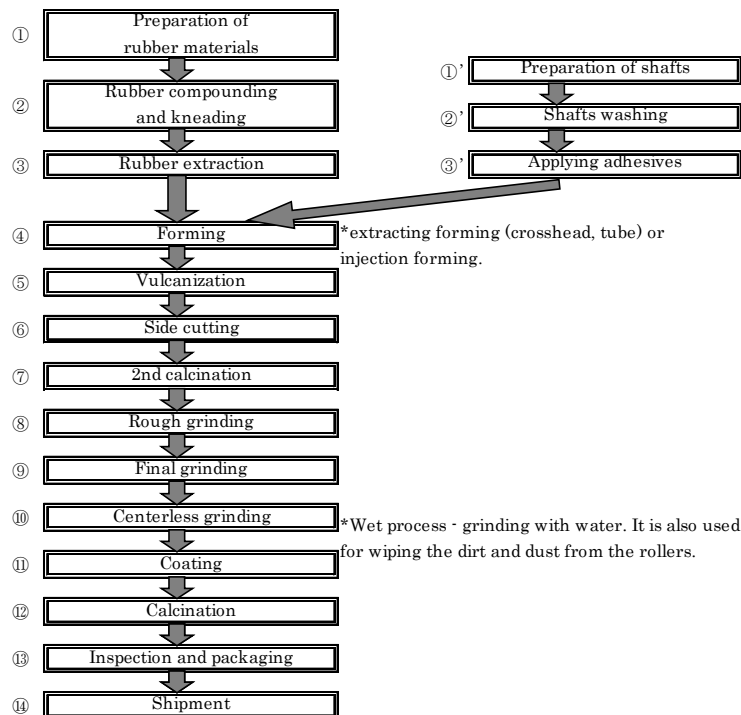
[1] Charge roller market (7 specialized makers, 2 in-house makers, and a dozen others)

- Market overview: **In 2023, shipment volume declined by 8.2% year-on-year to 157.72 million units.**
- Materials: Epichlorohydrin rubber, EPDM, and urethane rubber among others.
- Maintaining chargeability, improving toner release characteristics, and reducing costs.

1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/
4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) EPDM 2) Epichlorohydrin rubber-based 3) Urethane rubber 4) NBR-based/ 7. Technological and material trends of charge rollers 1) Layer structures 2) Methods of controlling electrical resistance 3) Future outlook for materials/ 8. Price trends, lifespan, and manufacturing methods of charge rollers/ 9. Supply destinations for charge rollers (Japan and overseas)/ 10. Production site trends for charge rollers (Japan and overseas)



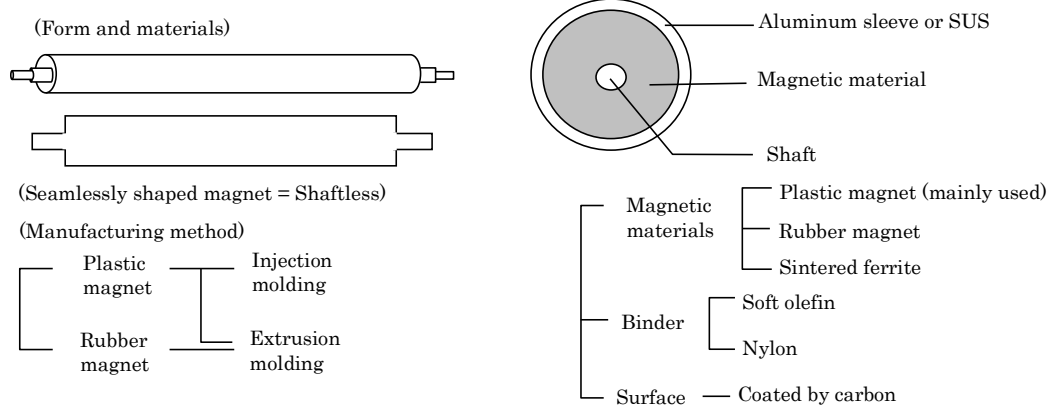
Manufacturing process of the charge roller



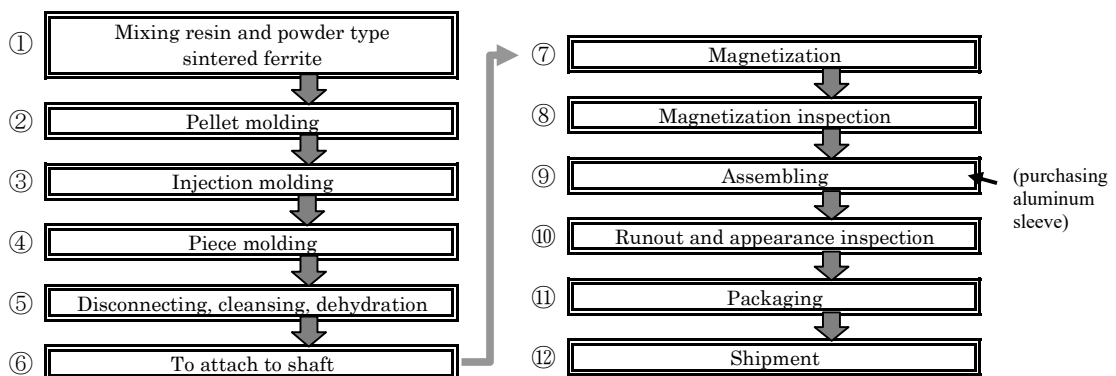
[2] Magnetic roller market (5 specialized makers, 3 in-house makers, and a dozen others)

- Market overview: **In 2023, shipment volume declined by 9.1% year-on-year to 109.34 million units.**
- Materials: Plastic magnets are primarily used; however, a mixture of various materials from both plastic and rubber magnets is also employed.

1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) Plastic magnet 2) Rubber magnet 3) Sintered ferrite 4) Combined types/ 7. Technological and material trends of magnetic rollers 1) Magnetic materials 2) Binders 3) Sleeves 4) Future outlook for materials/ 8. Price trends and manufacturing methods of magnetic rollers/ 9. Supply destinations for magnetic rollers (Japan and overseas)/ 10. Production site trends for magnetic rollers (Japan and overseas)



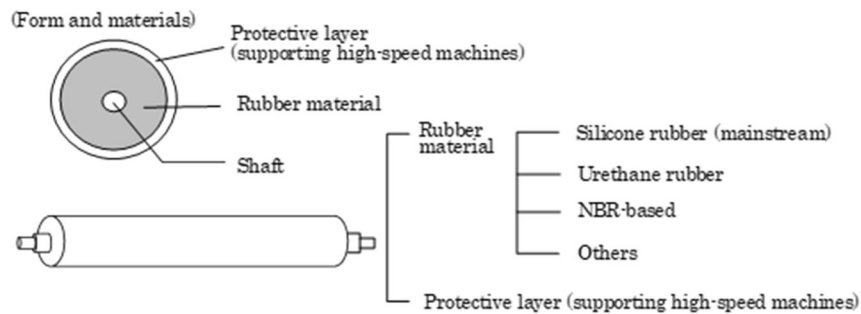
Manufacturing process of the magnetic roller (shaft attaching type)



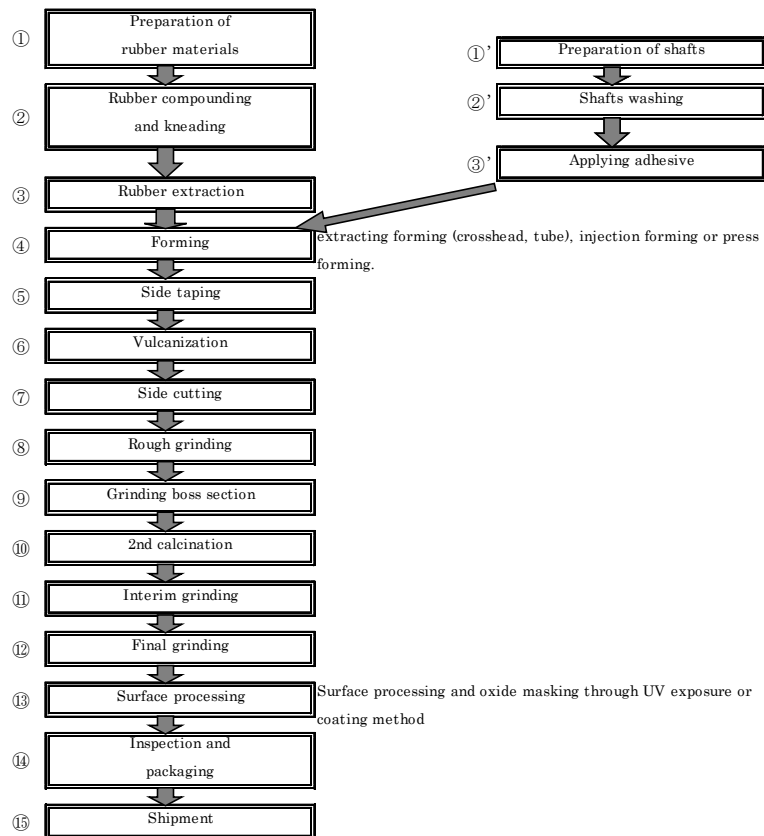
[3] Developer roller market (11 specialized makers, 2 in-house makers, and several others)

- Market overview: **In 2023, shipment volume declined by 9.6% year-on-year to 84.66 million units.**
- Materials: Silicone rubber, urethane rubber, and NBR among others.

1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) Silicone rubber 2) Urethane rubber 3) NBR-based/ 7. Technological and material trends of developer rollers 1) Support for high-speed printing 2) Future outlook for materials/ 8. Price trends, lifespan, and manufacturing methods of developer rollers/ 9. Supply destinations for developer rollers (Japan and overseas)/ 10. Production site trends for developer rollers (Japan and overseas)



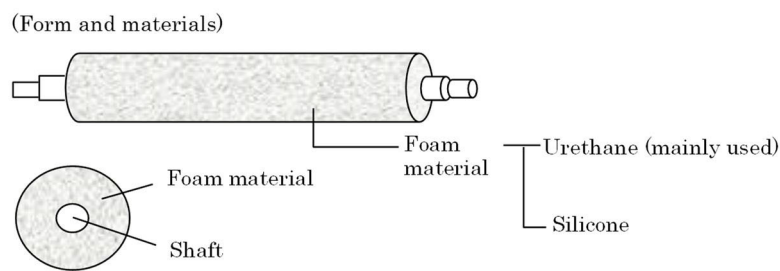
Manufacturing process of the developer roller



[4] Toner adder roller market (8 specialized makers, 1 in-house maker, and more than 10 others)

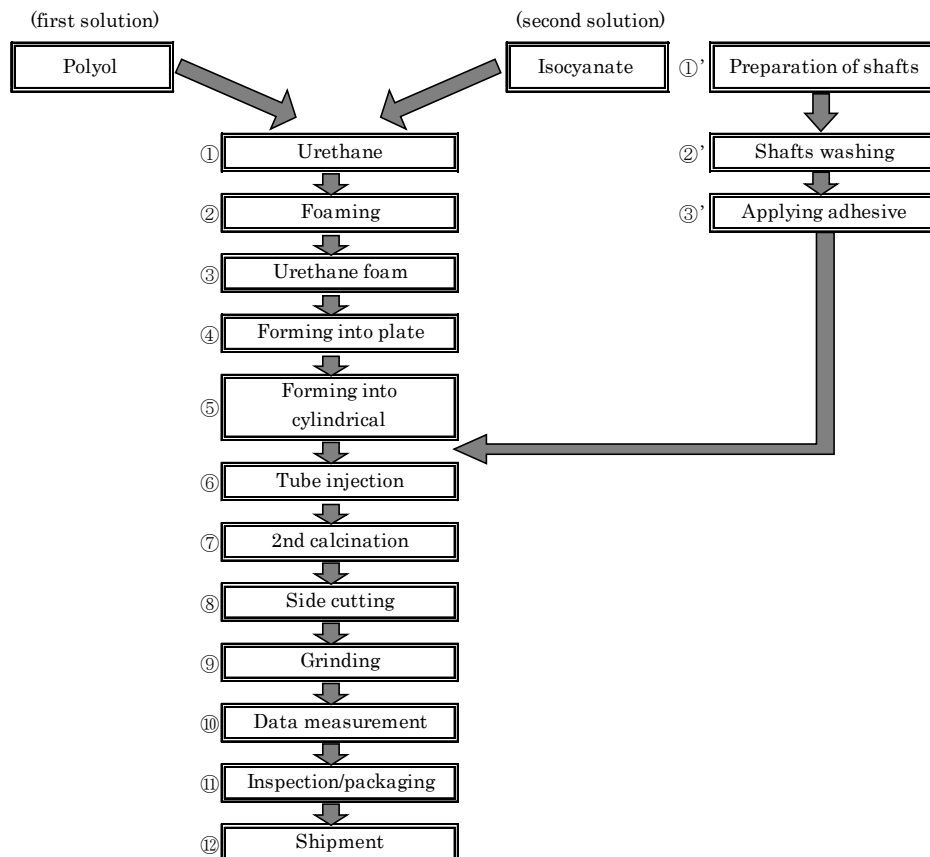
• Market overview: **In 2023, shipment volume declined by 7% year-on-year to 89.47 million units.**
 • Materials: Urethane foam

1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/
4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) Urethane foam 2) Silicone foam/ 7. Technological and material trends of toner adder rollers 1) Support for high-speed printing 2) Future outlook for materials/ 8. Price trends and lifespan of toner adder rollers/ 9. Supply destinations for toner adder rollers (Japan and overseas)/ 10. Production site trends for toner adder rollers (Japan and overseas)



*It is used for printers running a non-magnetic mono-component system.

Manufacturing process of the toner adder roller (urethane foam)

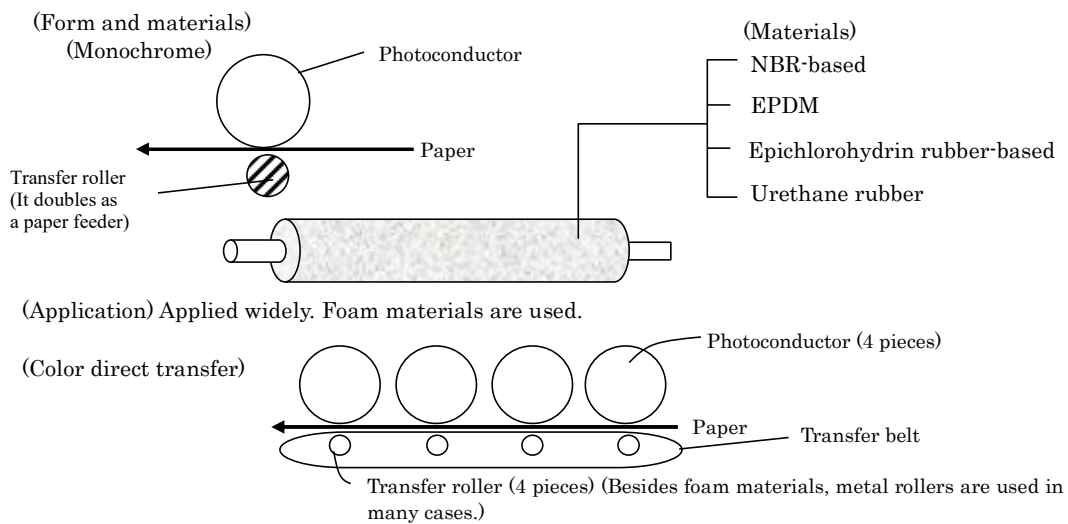


[5] Transfer roller market (10 specialized makers, no in-house makers, and a dozen others)
(including the first and second transfer)

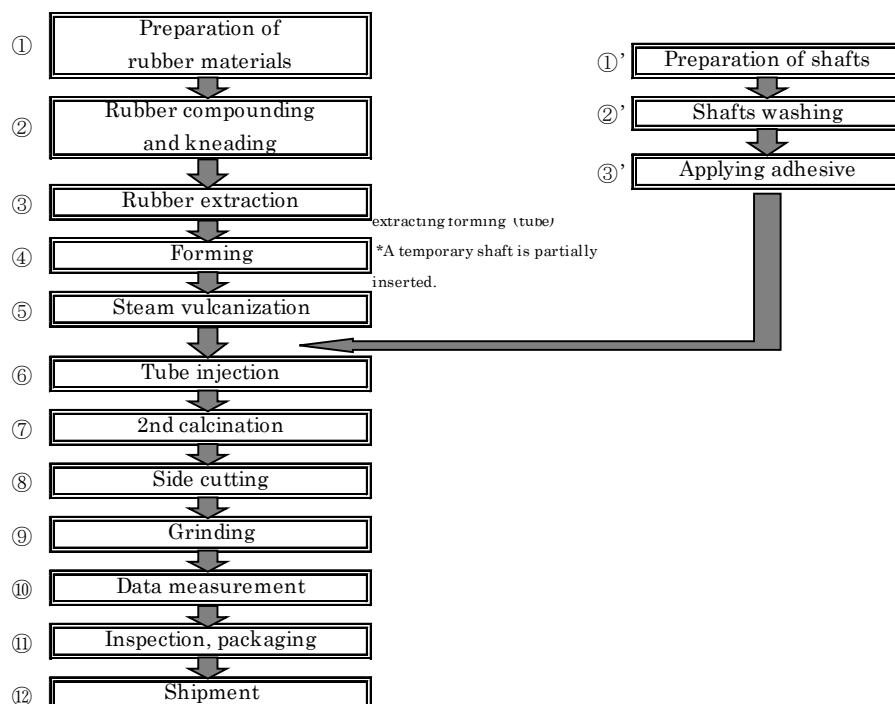
• Market overview: **In 2023, shipment volume declined by 23.1% year-on-year to 38.58 million units.**

• Materials: NBR, epichlorohydrin rubber, urethane rubber, and EPDM.

1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/
4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) NBR-based 2) Epichlorohydrin rubber-based 3) Urethane rubber 4) EPDM/ 7. Technological and material trends of transfer rollers/ 8. Price trends, lifespan, and manufacturing methods of transfer rollers (first transfer/second transfer)/ 9. Supply destinations for transfer rollers (Japan and overseas)/ 10. Production site trends for transfer rollers (Japan and overseas)



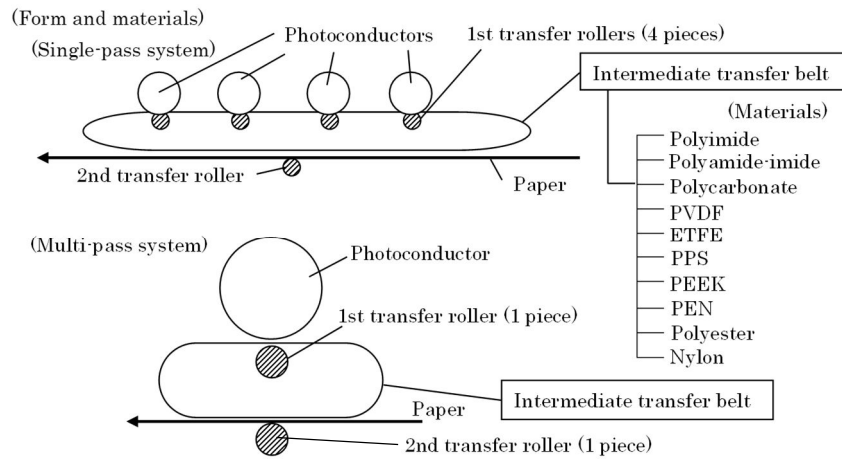
Manufacturing process of the transfer roller



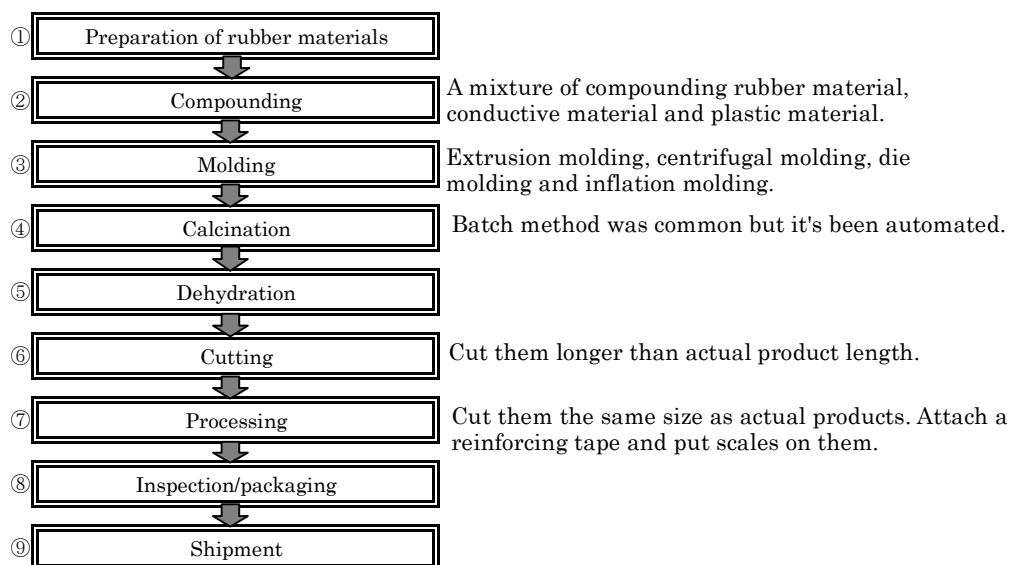
[6] Intermediate transfer belt market (7 specialized makers and 4 in-house makers)

- Market overview: **In 2023, shipment volume declined by 0.2% year-on-year to 9.82 million units.**
- Materials: PI, PAI, PEN, and PET among others.

1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) Polyimide 2) Polyamide-imide 3) Polycarbonate 4) ETFE 5) PPS 6) PVDF 7) PEEK 8) Polyester 9) Others/ 7. Technological and material trends of intermediate transfer belts 1) Base materials 2) Surface materials 3) Future outlook for materials/ 8. Price trends, lifespan, and manufacturing methods of intermediate transfer belts/ 9. Supply destinations for intermediate transfer belts (Japan and overseas)/ 10. Production site trends for intermediate transfer belts (Japan and overseas)



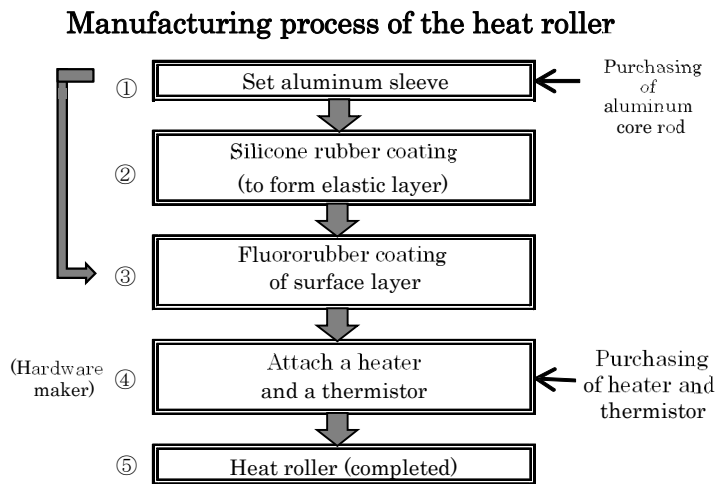
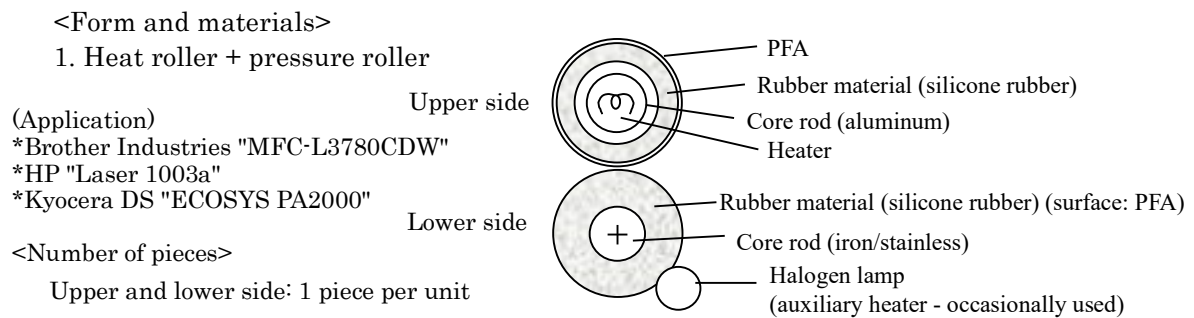
Manufacturing process of the intermediate transfer belt



[7] Heat roller market (7 specialized makers, 1 in-house maker, and more than 20 others)

• Market overview: **In 2023, shipment volume declined by 21.6% year-on-year to 13.86 million units.**
 • Materials: A hard roller with fluorine coating applied to the core rod, and a soft roller with a layer of silicone rubber and fluorine coating over the core rod.

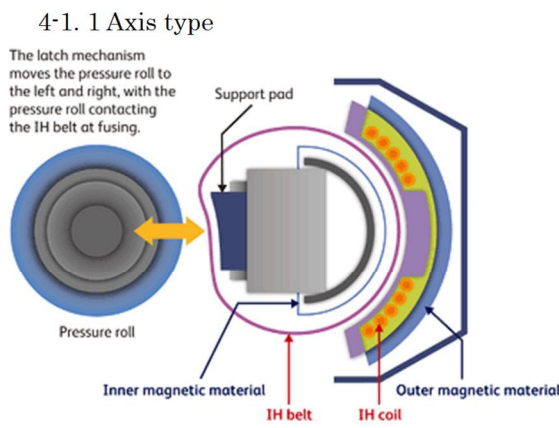
1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/
4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) Hard rollers (PFA/PTFE) 2) Soft rollers (silicone rubber+PFA)/ 7. Technological and material trends of heat rollers 1) Sleeves 2) Surface materials 3) Support for soft rollers used in color machines 4) Support for belt fusing 5) Future outlook for materials/ 8. Price trends and lifespan of heat rollers/ 9. Supply destinations for heat rollers (Japan and overseas)/ 10. Production site trends for heat rollers (Japan and overseas)



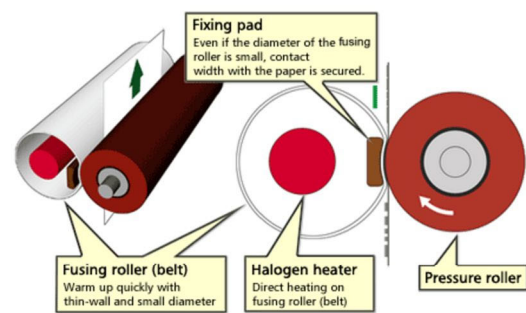
[8] Fuser belt (film) market (8 specialized makers, 3 in-house makers, and a dozen others)

- Market overview: **In 2023, shipment volume declined by 15.1% year-on-year to 18.57 million units.**
- Materials: Polyimide, nickel, and SUS.

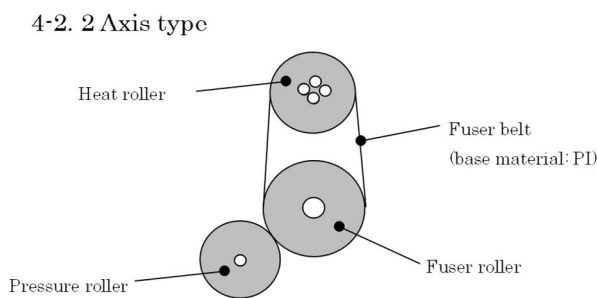
1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) Polyimide 2) Nickel 3) SUS 4) Others/ 7. Technological and material trends 1) Base materials 2) Surface treatment 3) Support for color machines 4) Future outlook for materials/ 8. Price trends and lifespan of fuser belts/ 9. Supply destinations for fuser belts (Japan and overseas)/ 10. Production site trends for fuser belts (Japan and overseas)



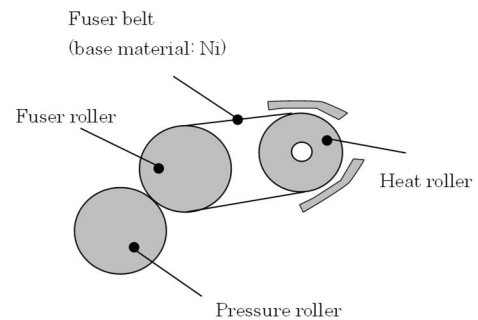
FUJIFILM BI "Apeos C6570"



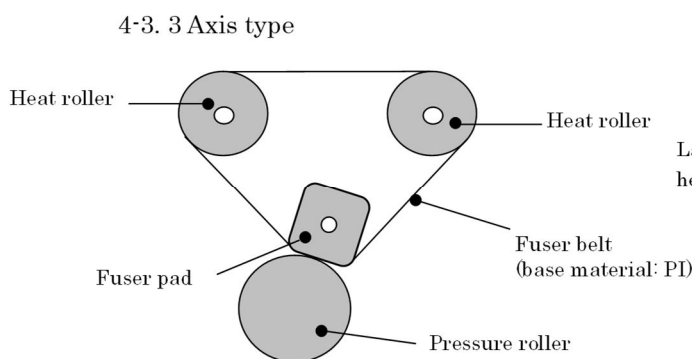
Ricoh "ROCOH IM C6010"



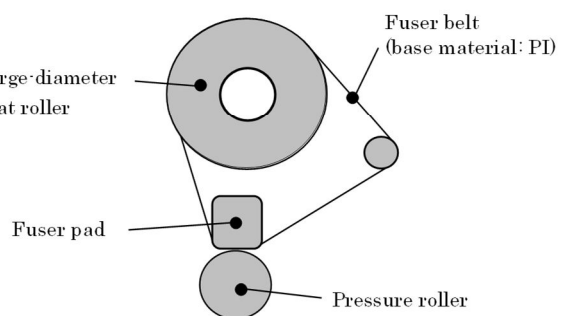
Konica Minolta "AccurioPress C4080"



Ricoh "RICOH Pro C7500"



FUJIFILM BI "Versant 4100"



Canon "imagePRESS V1350"

[9] Pressure roller/belt market (12 specialized makers, no in-house makers, and a dozen others)

- Market overview (pressure roller): **In 2023, shipment volume declined by 21.1% year-on-year to 35.1 million units.**
- Materials: Silicone rubber. The surface layer is fluorine-coated.
- Market overview (pressure belt): **In 2023, shipment volume declined by 22.2% year-on-year to 1.26 million units.**
- Materials: Polyimide and PEEK. The surface layer is fluorine-coated.

1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) Silicone rubber+PFA/ Others (pressure rollers) 2) Polyimide (pressure belts)/ 7. Technological and material trends of pressure rollers 1) Layer structures 2) Support for heater-equipped machines 3) Future outlook for materials/ 8. Technological and material trends of pressure belts 1) Base materials 2) Surface materials 3) Future outlook for materials/ 9. Price trends, lifespan, and manufacturing methods of pressure rollers and belts/ 10. Supply destinations for pressure rollers and belts (Japan and overseas)/ 11. Production site trends for pressure rollers and belts (Japan and overseas)

2. Heat roller + pressure belt

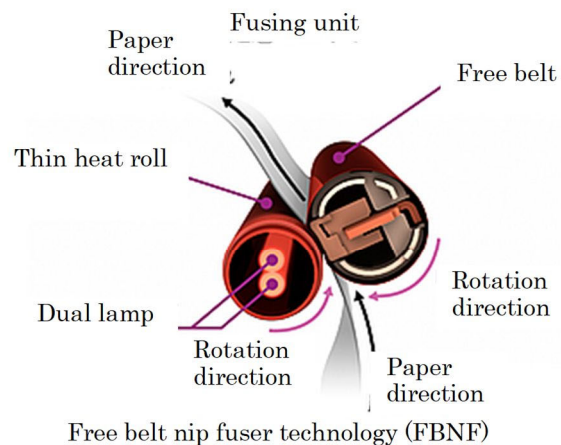
(Application)

*FUJIFILM BI "ApeosPrint C4030"

*Konica Minolta "bizhub 4750i"

<Number of pieces>

Upper and lower side: 1 piece per unit



3. Fuser film + pressure roller

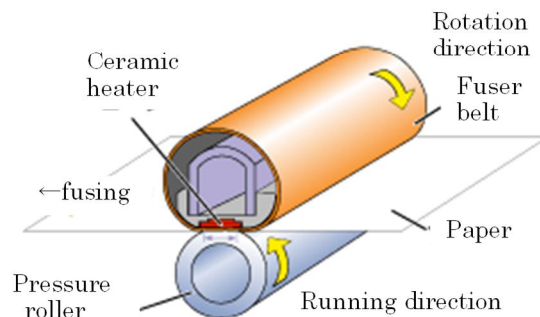
(Application)

*HP "Color LaserJet Pro 4201dn"

*Lexmark "CS531dw"

<Number of pieces>

Upper and lower side: 1 piece per unit

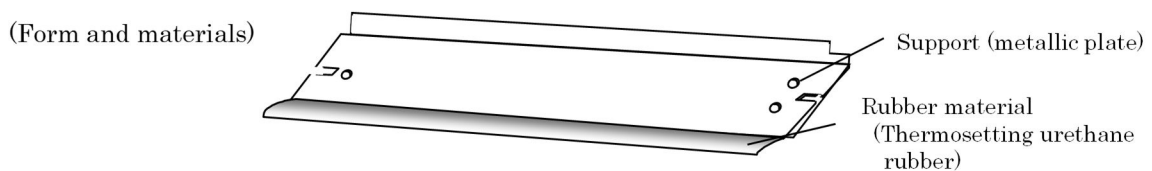


[10] Cleaning blade market (7 specialized makers, 1 in-house maker, and a dozen others)

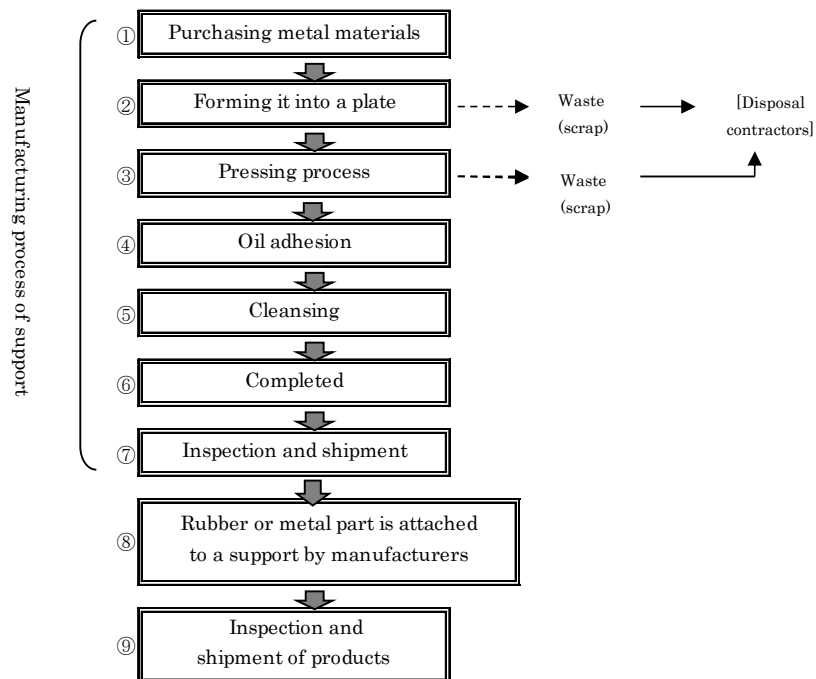
- Market overview: **In 2023, shipment volume declined by 8.3% year-on-year to 156.67 million units.**
- Materials: Polyurethane rubber

1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/
4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) Polyurethane rubber/ 7. Technological and material trends of cleaning blades 1) Metallic plates 2) Blade edge materials 3) Support for chemically prepared toner
- 4) Future outlook for materials/ 8. Price trends, lifespan, and manufacturing methods of cleaning blades/ 9. Supply destinations for cleaning blades (Japan and overseas)/ 10. Production site trends for cleaning blades (Japan and overseas)

This refers to an elastic blade used in the cleaning step of the electrophotographic process. Due to its mechanical strength, urethane rubber is commonly used. Typically, the blade is placed in contact with the photoconductor against the direction of rotation. There is also a type in which rubber is molded only at the tip of a metal blade.



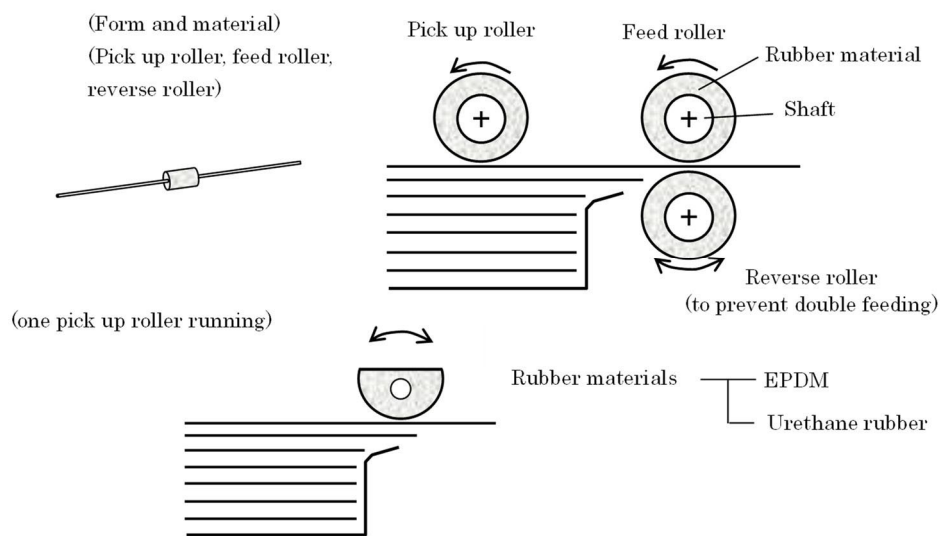
Manufacturing process of the cleaning blade



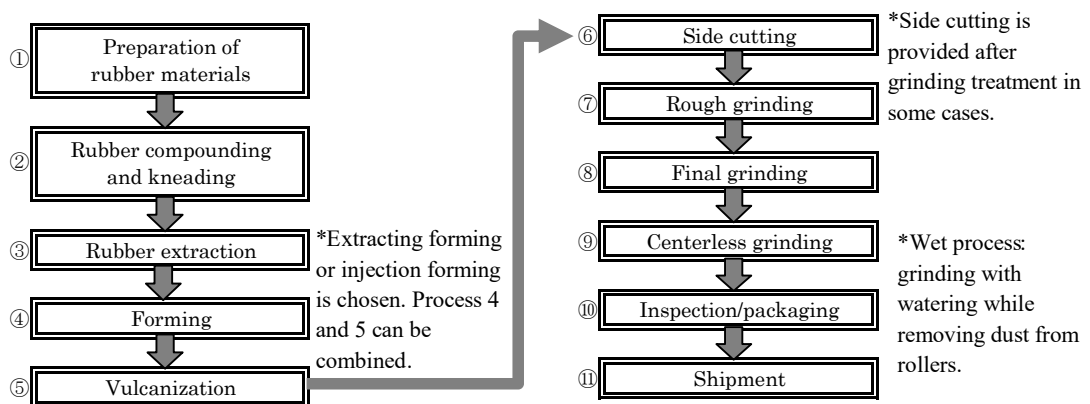
[11] Paper feeder roller market (7 specialized makers and 5 others)

- Market overview: **In 2023, shipment volume declined by 14.9% year-on-year to 155.77 million units.**
- Materials: EPDM and urethane rubber.

1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/
4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) EPDM 2) Urethane rubber/ 7. Technological and material trends of paper feeder rollers 8. Price trends, lifespan, and manufacturing methods of paper feeder rollers/ 9. Supply destinations for paper feeder rollers (Japan and overseas)/ 10. Production site trends for paper feeder rollers (Japan and overseas)



Manufacturing process of the paper feeder roller

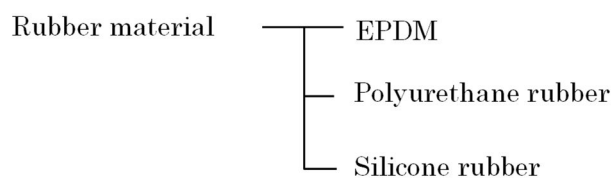
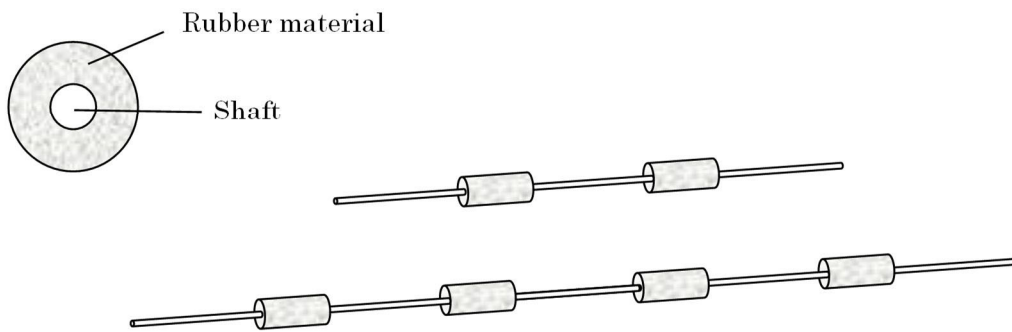


[12] Transporting roller market (10 specialized makers and several others)

- Market overview: **In 2023, shipment volume declined by 14.7% year-on-year to 258.93 million units.**
- Materials: EPDM

1. Component structure diagrams/ 2. Manufacturing process diagrams/ 3. Shipment volume and value trends by maker (2022-2028) 1) Genuine component market 2) Third-party component market/
4. Shipment volume and value trends (2022-2028) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2022-2028) 1) EPDM 2) Silicone rubber 3) Polyurethane rubber/ 7. Technological and material trends of transporting rollers 1) Support for high-speed printing 2) Future outlook for materials/ 8. Price trends, lifespan, and manufacturing methods of transporting rollers/ 9. Supply destinations for transporting rollers (Japan and overseas)/ 10. Production site trends for transporting rollers (Japan and overseas)

(Form and material)



VI-3. Individual Makers (specialized makers/in-house makers)

Main survey targets

(Japanese specialized makers)

Archem (formerly Bridgestone) / I.S.T / Arai Seisakusho / Inoac Corporation / SWCC (formerly Showa Cable Systems) / NOK/Synztec / Kaneka / Kinjo Rubber / Kinyosha / Gunze / Shin-Etsu Polymer / Sumitomo Rubber Industries / Sumitomo Electric Industries / Sumitomo Riko / TDK / Toho Rubber / Nissei Electric / Nitta Chemical Industrial Products / NEOMAX Engineering / Bando Chemical Industries / Fukoku / Proterial (formerly Hitachi Metals) / Meiji Rubber & Chemical / Yamauchi / Others

(In-house makers)

Canon / Ricoh / FUJIFILM Business Innovation / Konica Minolta / Toshiba TEC

(Overseas specialized makers)

Ah-Sung Chemical (South Korea) / Galaxia Device (South Korea) / Jahwa Electronics (South Korea) / Sang-A Frontec (South Korea) / Shenzhen Fancy Creation Industrial (China) / Shenzhen LEPUTAI Technology (China) / Taejin Precision (South Korea) / Teamsung New Materials (China)

1. Market trends by component (2022-2028)
 - (1) Shipment volume (genuine and third-party products) (2) Shipment value
 - ①Charge roller ②Magnetic roller ③Developer roller ④Toner adder roller ⑤Transfer roller ⑥Intermediate transfer belt ⑦Fusing system (heat roller/fuser belt) ⑧Pressure system (pressure roller/pressure belt) ⑨Cleaning blade ⑩Paper feeder roller ⑪Transporting roller ⑫Others
2. Market trends by application and size (2022-2028)
 - (1) Monochrome (A4/A3) (2) Color (A4/A3)
 - ①Charge roller ②Magnetic roller ③Developer roller ④Toner adder roller ⑤Transfer roller ⑥Intermediate transfer belt ⑦Fusing system (heat roller/fuser belt) ⑧Pressure system (pressure roller/pressure belt) ⑨Cleaning blade ⑩Paper feeder roller ⑪Transporting roller
3. Market trends by material (2022-2028)
 - ①Charge roller ②Magnetic roller ③Developer roller ④Toner adder roller ⑤Transfer roller ⑥Intermediate transfer belt ⑦Fusing system (heat roller/fuser belt) ⑧Pressure system (pressure roller/pressure belt) ⑨Cleaning blade ⑩Paper feeder roller ⑪Transporting roller
4. Shipment trends for production printers (volume and value)/Material trends
5. Technological and material trends by component
6. Price trends/lifespan/manufacturing methods
7. Production sites by component

Japan / China / South Korea / Malaysia / Vietnam / Thailand / Philippines
8. Major supply destinations

Canon / ETRIA (Ricoh, Toshiba TEC, OKI) / FUJIFILM Business Innovation / Konica Minolta / Sharp / Kyocera Document Solutions / HP (HP Printing Korea) / Brother Industries / Muratec / Lexmark / Others
9. Revenue breakdown: electrophotographic rollers vs. others (inkjet, ATM, etc.)

Sample Page

*Actual report includes figures and detailed comments.

2. Shipment volume and shipment value by process (2023)

Component	Shipment volume (K)	Ratio (%)	YoY (%)	Shipment value (million yen)	Ratio (%)	YoY (%)
Charge Roller						
Magnetic Roller						
Developer Roller						
Toner-Adder Roller						
Transfer Roller						
Intermediate Transfer Belt						
Cleaning Blade						
Sub total						
Heat Roller						
Fuser Belt						
Pressure Roller						
Pressure Belt						
Sub total						
Paper Feeder Roller						
Transporting Roller						
Sub total						
Others						
Total						

1. Shipment volume (2021-2027)

Maker	Year							Unit: Thousand
	2021	2022	2023	2024 (Estimate)	2025 (Forecast)	2026 (Forecast)	2027 (Forecast)	
	%	%	%	%	%	%	%	
Archem (Former Bridgestone)								
NOK/Syntec								
Shin-Etsu Polymer								
Sumitomo Rubber Industries								
Sumitomo Riko								
Bando Chemical Industries								

10. List of roller and roller-related component makers (2023 results)

*: Makers with individual data available

Maker	Charge Roller	Magnetic Roller	Developer Roller	Toner-Adder Roller	Transfer Roller	Intermediate Transfer Belt	Heat Roller	Fuser Belt	Pressure Roller	Pressure Belt	Cleaning Blade	Paper Feeder Roller	Transporting Roller
* Archem (Former Bridgestone)	○	○	○	○		○							
* I.S.T						○		○					
* Aisi Saitohkubo									○				○
* INMAC				○	○							○	○
* SWCC (Sumitomo Shima Cable Systems)								○	○				
* NOK/Syntec	○		○		○	○	○	○	○		○	○	○
Okura Industrial						○							
Kateca					○						○	○	○
* Canon	○	○	○	○		○		○			○		
* Kingo Rubber												○	○
* Kanyoha					○		○	○					
* Gamao						○			○				
* Kanica Minolta		○				○							
* Shin-Etsu Polymer			○	○				○					
* Sumitomo Rubber Industries	○		○		○							○	○
* Sumitomo Electric							○	○					
* Sumitomo Riko	○		○	○	○						○	○	○
SEIKO	○											○	○
* TDK		○											
* Toshiba TEC							○						
* Toho Rubber									○				
* Nissai Electric							○	○					
* Nitta Chemical Industrial Products											○		
* NEOMAX Engineering		○											
Power Supply Technology		○											
* Bando Chemical Industries	○		○								○		○
* Fukuoka				○				○					
* FUJIFILM Business Innovation	○				○			○		○			
* Meiji Rubber & Chemical					○								
* Yamauchi	○		○		○							○	○
MCC Advanced Moldings						○							
* Bosh		○	○			○		○					
* Ah-Sung Chemical (South Korea)	○		○	○	○						○	○	○
Erhi (U.S.A.)							○	○				○	○
Fujian Ascend (China)	○		○					○					
* Galaxia Deotec (South Korea)	○		○										○
* Juhwa Electronics (South Korea)	○	○	○	○	○								
KB Roller Tech (Germany)					○	○	○	○	○	○			
* Sang-A Frantec (South Korea)					○			○					
* Shenzhen Fancy (China)			○	○	○		○				○	○	○
* Shenzhen Lepotal (China)	○		○	○	○				○		○	○	○
* Tajuin Precision (South Korea)					○		○	○				○	○

volume and value by application and material

component development system is only used in printers. Manufacturers such as Brother, Ricoh, Minolta, HPPK, and PANTUM use the non-magnetic mono-component system in most manufacturers use the non-magnetic mono-component systems in color printers, except for DS, which mainly use the dual-component system.

ing in a significant decrease. Although the figures are expected to improve in 2024, the office printing market is maturing faster and is expected to decline slowly from 2025.

ized manufacturers, Shin-Etsu Polymer has the largest market share (16.9% of the total), followed by NOK/Syntec (10.3%), and Archem (4.7%).

rs Canon and Ricoh produced 12 million units and 120,000 units respectively in 2023.

manufacturers supply HPPK. Their production volume is trending downward.

rs, Fancy supplies genuine products, and LEPUTAI is a third-party product supplier. Huaian Technology (Huaian, Jiangsu, China), a subsidiary of Ninestar, produces a considerable volume of genuine products for Pantum.

Anhui Zhongheng Rubber-Plastic Products (Ningguo, Anhui, China), Anno Technologies (China), Beijing Green Filer International Rubber & Plastic Production (Beijing, China), is in Zhuhai, Guangdong, China), Hubei Donglong (Wuhan, Hubei, China), HLSHIN (Pakery (South Korea) formerly Daegin DMP), Shenzhen Dalong Technology (Shenzhen, Shenzhen Zhaxinlong Science & Technology (Shenzhen, Guangdong, China), Sino Imaging (Guangdong, China), Zhongshan Benma Printmax Imagine (Zhongshan, Guangdong, China), (Zhuhai, Guangdong, China), Zhuhai Hongtu Electronic Technology (Zhuhai, Guangdong, Inter Consumables (Zhuhai, Guangdong, China), and Zhuhai Zhongxinda Technology (China).

*** Back numbers of Roller and Roller-related Market Forecast ***

Published Date	Title	Price	Total pages
2008.4	"Future Trend in Competitiveness of the Market"	\$4,400	679
2012.6	"Outlook of the industry"	\$5,000	655
2015.7	"The Future of the Roller and Roller-Related Component Industry that Requires Intelligence in Marketing Technologies"	\$4,000	683
2016.7	"The Reorganization of Hardware Machine Manufacturers Signals a New Phase for the Roller Component Industry"	\$4,000	687
2017.8	"The Roller-related Parts Industry Converts to Modular Production"	\$4,000	626
2018.8	"Restructuring or Withdrawal? Makers at a Crossroads in the Roller-related Component Industry"	\$4,000	653
2019.8	"The Roller-related Component Industry in Dire Need of Strategic Transformation Plan"	\$4,000	657
2020.11	"The Future of the Component Industry Depending on the Underlying Technology"	\$4,000	651
2021	"The Future of the Roller-related Component Industry: Cost and Quality as the Lifeline" (Available upon request)	\$5,000	630
2022.7	"Comprehensive Analysis of the Component Industry Aiming to Establish a Relationship of Coexistence and Mutual Prosperity"	\$5,000	393
2023	"Comprehensive Analysis of the Parts Industry As It Enters an Era of Rising Prices" (Available upon request)	\$5,000	385
2024.6	"The Latest Trends in the Components Industry Facing Market Maturity"	\$5,000	372