Multi-client Study

Research Proposal

[2026 version of Photoconductor Market Forecast]

“Comprehensive Analysis of the Photoconductor Market: Assessing the Future Trajectory of a Mature Sector”

＝Detailed analysis of market trends in photoconductors, substrates, and coating materials＝

January 2026

Data Supply Inc.

〈Overview〉

I. Theme

[2026 version of Photoconductor Market Forecast]

"Comprehensive Analysis of the Photoconductor Market: Assessing the Future Trajectory of a Mature Sector"

＝Detailed analysis of market trends in photoconductors, substrates, and coating materials＝

II. Abstract

1. Market Environment: Structural Contraction and Sustained Decline in Demand

The MFP and printer industry in 2025 faced an unstable year, impacted by external factors such as additional tariffs and the slowdown of the Chinese economy. Furthermore, the ongoing shift toward paperless offices and operational efficiency has led to a structural decline in print volumes. The photoconductor market, which supplies a core component in electrophotographic processes, has been significantly affected by these trends, with unit shipments continuing to decline in recent years. Alongside the sharp contraction of the laser printer segment, which accounts for the majority of photoconductor demand, the extended lifespan of photoconductors used in MFPs has further reduced replacement demand. This trend has now extended into the MFP sector, making the overall market contraction even more pronounced. A recovery in demand remains unlikely, and the market outlook for 2026 continues to be uncertain.

2. Industry Restructuring Trends: Structural Shifts Amid Relative Stability

In the MFP and printer industry, consolidation has made some progress, including the participation of OKI in ETRIA, a joint venture between Ricoh and Toshiba TEC, in 2025. These developments are also affecting component manufacturers, prompting asset sales and business integrations that are reshaping the entire supply chain. However, the direct impact on the photoconductor market remains limited at this stage, and the current supply framework is expected to continue in the short term. While manufacturers producing in-house currently plan to maintain their production volumes, discussions may emerge in the medium to long term around external procurement or expanding sales to third parties. In the third-party market, Chinese manufacturers continue to play a significant role; however, as the genuine product market contracts, further market consolidation may occur.

3. Technology and Environmental Compliance: Impact of Longer Lifespans and Regulation

In response to increasingly stringent environmental regulations, efforts to extend photoconductor lifespan and reduce environmental impact are ongoing. While the longer lifespan benefits end users, it also further reduces the demand for replacements. In addition, the growing adoption of generative AI has led to the automatic generation of business documents and expanded cloud sharing, thereby reducing the need for printed output. These developments may ultimately impact photoconductor demand through a further decline in print volumes.

4. About the Publication of the 2026 Version of Photoconductor Market Forecast

The 2026 version of Photoconductor Market Overview marks the 36th edition of this series. This year's report follows the established research format and continues to systematically organize data on supply and demand trends in a mature market, the business status of major manufacturers, and changes in the supply chain. Its aim is to provide foundational data to support the business operations and procurement strategies of relevant stakeholders. We hope this report continues to serve as a valuable reference for your decision-making.

III. Survey Items and Survey Targets

1. Survey Items
 1) Photoconductor

 - OPC drum
 - a-Si drum

 2) Aluminum substrate for photoconductors
 3) Coating materials

2. Survey Targets

1) Photoconductor manufacturers	(9 in Japan, 22 overseas)
2) Substrate manufacturers (extrusion, drawing, burnishing)	(10 in Japan, 9 overseas)
3) Coating material manufacturers (CTL/CGL/UCL/OCL)	(15 in Japan, 4 overseas)
4) Hardware manufacturers (MFP/LBP/PP)	(10 in Japan, 10+ overseas)

IV. Survey Scope and Methods

1. Survey Coverage Period
 Actual results from 2023 to 2025; estimates for 2026, and forecasts through 2029
2. Geographical Scope: Japan, North America, Europe, South Korea, China, and other regions.
3. Survey Methods
 1) Interviews with targeted manufacturers (including online meetings)
 2) Analysis and investigation of publicly available literature, documents, statistical data, and other sources.
 3) Utilization of data accumulated by our company

V. Survey Format, Period, and Others

1. Survey Format: This survey is conducted as a multi-client study.
2. Survey Period: January and February 2026
3. Scheduled Publication Date: The English version will be provided upon order and delivered approximately two months after receipt of the order.
4. Report Format: PDF
5. Report Price: USD 5,500.
6. Survey Conducted by:
 Yukio Yamamoto: yamamoto@datasupply.jp
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 Homepage: http://www.datasupply.jp/index(english).html
7. How to place an order
 Please send an email including your name, company, department, and phone number to Data Supply Inc. at infods@datasupply.jp or any staff shown above.

VI. Survey Categories

A. Comprehensive Analysis

1. Worldwide production volume of photoconductors (2023-2029 forecasts)
   Japan / North America / Europe / China / Others
2. Production volume of photoconductors by type (2023-2029 forecasts) OPC / a-Si
3. Production volume of photoconductors by application (2023-2029 forecasts)
   MFP / PP and Printers / Fax
4. Production volume by shipment application (for hardware units / for supplies)
   (2023-2029 forecasts)
5. Comparison of worldwide production volume of genuine and third-party photoconductors
   (2024-2026 estimates)
   OEM and third-party ratios by manufacturer
6. Changes in the global top 10 producers by production volume (2024-2026 estimates)
   Overall share / OEM share / Third-party share
7. Worldwide production volume by region, manufacturer, and type (2023-2029 forecasts)
   Japan / North America / Europe / China / Others
8. Worldwide production volume by region, manufacturer, and application (2023-2029 forecasts)
   Japan / North America / Europe / China / Others
9. Production volume of OEM and third-party photoconductors (2025)
   Worldwide / By region
10. Strategies to expand outsourcing and external sales
11. Comparison of trends in photoconductor production volume in Japan and China
12. Production trends of photoconductor substrates
    Japanese manufacturers / Overseas manufacturers
13. Status of coating material usage by Japanese manufacturers
    CTL / CGL / UCL / OCL
14. Japanese and overseas production sites for photoconductors
    Japanese manufacturers / Overseas manufacturers

B. Photoconductor Market

1. Trends among Japanese manufacturers
   1-1. Aggregated analysis
   1) Production volume by type and application (MFP / PP and Printers / Fax) (2023-2029 forecasts)
      Production in Japan / Overseas production
   2) Production volume by type, region, and manufacturer (2023-2029 forecasts)
      Production in Japan / Overseas production
   3) Production volume by diameter, application (MFP / PP and Printers / Fax) and type (2025)
   4) Production volume and value by diameter and manufacturer (2025) 20 ϕ –260 ϕ
   5) Production volume and value by length (A4, A3, A2, A1, A0) and manufacturer (2025)
   6) Production volume and value by diameter, length, and type (2025)
   7) Development trends in long-life A3 photoconductors by manufacturer
   8) Production volume by positive- and negative-charging types (2025)
   9) Production plans for negative-charging a-Si photoconductors
   10) Production status of Japanese manufacturers by application, type, and region (2024-2026)
   11) Supply relationships and volumes between hardware manufacturers and photoconductor manufacturers (2025)

1-2. Individual manufacturer trends (2023-2029 forecasts)

■Common survey items■
- Overall production volume and production value (2023-2029 forecasts)
- Current status and future outlook of production volume by region, site, type, and application (Japan and overseas) (2023-2029 forecasts)
- Trends in production sites (capital investment, increases and decreases in manufacturing lines, and future sites) ・Production volume by diameter and application
- Production volume, value, and unit price by diameter and length (2025 results)
- Product lineup by diameter and length ・Production volume by positive and negative charging type (2025 results) ・Development of long-life photoconductors and future outlook
- Strategies to expand outsourcing and external sales
- Status of diameter downsizing and upsizing
- Current status, development, and procurement of coating layers and materials (UCL, CGL, CTL, OCL) ・Coating methods
- Countermeasures by genuine product manufacturers against third-party photoconductors
- Production ratio of genuine (OEM) and third-party products
- Delivery volume by destination (2024-2026 estimates)
- List of worldwide production sites

1) Canon 2) Ricoh (ETRIA) 3) FUJIFILM Business Innovation 4) Konica Minolta 5) Kyocera Group (1: Kyocera, 2: Kyocera Document Solutions 6) Sharp 7) Mitsubishi Chemical 8) Fuji Electric

2. Trends among overseas manufacturers

2-1. Aggregated analysis

1) Production volume by type and application (2023-2029 forecasts)
2) Production volume by type, region, manufacturer, and application (2023-2029 forecasts) North America / Europe / China / Others

2-2. Individual manufacturer trends (2023-2029 forecasts)

■Common survey items■
- Current status and future outlook of production volume by region, site, type, and application (2023-2029 forecasts)
- Production volume of genuine (OEM) and third-party products (2024-2026 estimates)
- Latest shipment trends

Production Region	Country	Company Name
N. America	USA (1)	Lexmark International
Europe	Netherlands (1)	Xerox Manufacturing (Nederland) B.V. *Withdrawn in 2024
Asia	China (16)	APS Photoconductor (Shanghai), Green Rich (Guangzhou) Optoelectronic Technology, Guangzhou A&G Optoelectronics Technology, HG Technologies, Hangzhou Ouya Optoelectronic Technology, Huaian Gantech Opto Electronics, Hubei HanMei Photoelectricity Science and Technology, Hubei Zhuoheng Optoelectronics Technology, Hunan Zhijian Copier Remanufacturing (COPITEK), Suzhou Goldengreen Technologies, Xin Printing Technology, Xinhua Caire Image Technology, Zeloq (Hunan) Technology, Zhuhai AlphaChem Technology (A&G Group), Zhuhai Hengjie Technology (COPITEK Group), Zhuhai TianYing Technology
	S. Korea (2)	JID Tech, KR OPC
	India (1)	OPC Technology Japan Pvt.
	Bangladesh (1)	Neo Bangla

C. Drum Substrate Market

1. Overall aggregated analysis
   1) Entry trends in the photoconductor industry (substrate / drawing / processing / coating)
   2) Business relationships between substrate manufacturers and processing makers
   3) Diagram of business relationships between substrate manufacturers and photoconductor manufacturers
   4) Growing adoption of Chinese products and future outlook
   5) Production volume by manufacturer (2023-2029 forecasts)
   6) Production volume by diameter and length (2025) 20φ–260φ, A4-A0
   7) Worldwide supply volumes to Japanese photoconductor manufacturers by supplier and production site
2. Individual manufacturer trends (2023-2029 forecasts)

■ Common survey items■

・Production volume by region (by site) (Japan and overseas)
・Production volume by type, diameter (20φ–260φ), application, and length (A4-A0)
・Production volume of turned and unturned tubes
・List of delivery volumes by production site for photoconductor manufacturers (worldwide)
・Measures for color photoconductors (runout, roundness, and surface roughness, etc.)
・Relationships with processing and drawing manufacturers
・Trends in production technology (turned and unturned tubes)
・Price trends and profitability ・Current status and future outlook of production sites

   1) Resonac 2) UACJ 3) Nikkeikin Act 4) Fuji Aluminum Tube Manufacturing
   5) Others (Hoshion, Xinma, Dongguan Handin Precision Aluminum, Jiangyin Chaojingda Aluminum & Plastic, Guangdong GoldEx Light Alloy, Ningbo Keno Aluminium, Chang Zhou Yi Fei, Vina Washin Aluminum)
   6) Drawing and processing manufacturers
   Nihon Shinkan, Hanamura Industries, Sohwa, Naito Manufacturing, Nakatani Shoko, Well Sure, Kyowa Precision Products, and others

D. Coating Material Market

1. Overview
2. CTL (charge transport layer) market (2023-2027)
   1) Production volume of binder resins by manufacturer (Japan / South Korea)
   2) Characteristics and production volume by material
   3) Price trends and profitability
   4) Major supply relationships for binder resins (Japan / South Korea / China / Taiwan)
   5) Individual manufacturer trends
   Mitsubishi Gas Chemical / Teijin / Idemitsu Kosan / Mitsubishi Chemical / Unitika / Others
3. CTM (charge transport material) market (2025)
   1) Worldwide market / Shipment volume of in-house manufacturers and CTM manufacturers (Japan / South Korea)
   2) Production volume of CTMs by type and material
   3) Price trends and profitability
   4) Trends among in-house manufacturers and specialized manufacturers
   In-house manufacturers / Takasago International Corporation / Nisshoku Techno Fine Chemical / Hodogaya Chemical / South Korean and Taiwanese manufacturers
   5) Major supply relationships
4. CGL / CGM (charge generation material) market (2025)
   1) Materials, pricing, and profitability of binder resins
   2) CGM materials and manufacturers (in-house manufacturers and specialized manufacturers)
5. UCL (undercoat layer) / OCL (overcoat layer) materials (2025)
   1) Adopting manufacturers 2) Materials 3) Challenges (profitability)

◆Overview of the contents of the Photoconductor Market Forecast (from the 2025 edition)◆

<Comprehensive Analysis> Sample

*Actual figures are included in the published report.

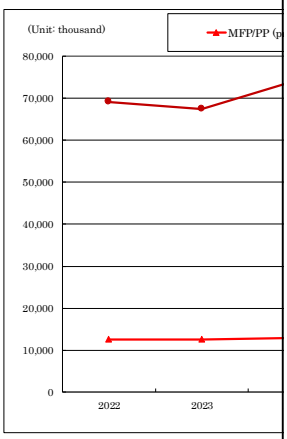
B-1-2. Japanese individual photoconductor makers

[1] Canon

1. Overall

1) Changes in production volume/production value (2022-2028)

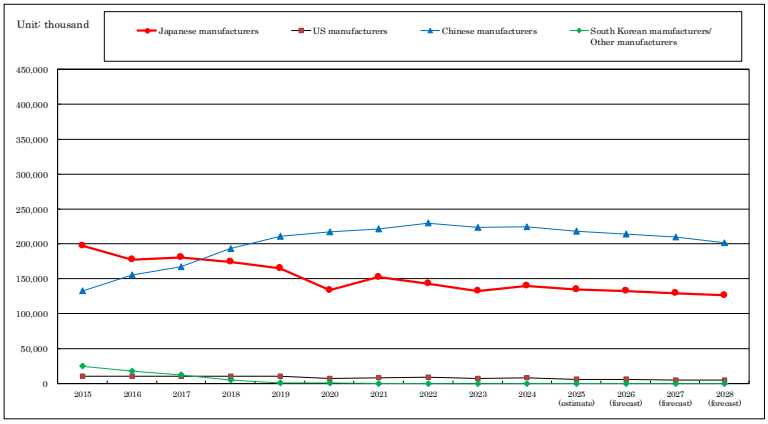
Application		Year	2022	%	2023	%	2024	%	2025 (estimate)	%	2026 (forecast)	%	2027 (forecast)	%	2028 (forecast)	%
Production volume (Unit: thousand)	MFP/PP															
		%														
	Printer/FAX															
		%														
	Total															
		%														
Production value (Unit: million yen)	MFP/PP															
		%														
	Printer/FAX															
		%														
	Total															
		%														



① Production volume/Production value
In 2024, Canon's production volume of phot
level, while the production value totaled 15.
the printer/fax segment, driving overall proc
customer HP, as well as a rebound in cartri
From 2025 onward, however, production is
lifespan of photoconductors has resulted in l
Additionally, the printer/fax segment contin
intensifying competition, suggesting that th
Regarding the production value in 2024, it
an increase in unit product prices.

② Production ratio by application
In terms of production volume, MFP/PP ap
up 94.7%. On a value basis, their shares we
by major customer HP, remains unchanged.

2. Changes in makers' production volume by country (2015-2028)



Unit: thousand

	Year	2015	%	2016	%	2017	%	2018	%	2019	%	2020	%	2021	%
Japanese manufacturers															
	%														
Overseas manufacturers	US														
	%														
	China														
	%														
	South Korea/ Others														
	%														
	total														
	%														
Total															
	%														

	Year	2022	%	2023	%	2024	%	2025 (estimate)	%	2026 (forecast)	%	2027 (forecast)	%	2028 (forecast)	%
Japanese manufacturers															
	%														
Overseas manufacturers	US														
	%														
	China														
	%														
	South Korea/ Others														
	%														
	total														
	%														
Total															
	%														

Over the ten-year period from 2015 to 2024, competition between Japanese and Chinese manufacturers has intensified in the photoconductor market. In 2018, Chinese manufacturers surpassed their Japanese counterparts in production volume, securing the largest market share by country. Since then, they have continued to account for more than half of the total global photoconductor production.
While Japanese manufacturers primarily serve the OEM market, and Chinese manufacturers focus on the third-party market. Originally, third-party products were only expected to fulfill small demand left by OEMs. However, in recent years, third-party products have significantly outpaced OEM products, reversing the conventional market structure. That said, the consolidation of Chinese manufacturers is gradually progressing, and this market imbalance is expected to ease over time.
Outside of Japan and China, U.S. manufacturers, namely Xerox and Lexmark, produce only a small volume of photoconductors. South Korean manufacturers, once a major force in the industry, have now been reduced to small-scale production by a few minor players. Similarly, India and other regions contribute only a minimal share to global production.

<Comprehensive Analysis> <Photoconductor Market> Sample

*Actual figures are included in the published report.

7. Production trends by maker

1) Worldwide production trends by maker

(1) Production volume

Unit: thousand

		2022	%	2023	%	2024	%	2025 (estimate)	%	2026 (forecast)	%	2027 (forecast)	%	2028 (forecast)	%
Japan	Canon														
	%														
	Yamanashi Electronics (ETRIA)														
	%														
	FUJIFILM Business Innovation														
	%														
	Konica Minolta														
	%														
	Kyocera Group (Kyocera/Kyocera DS)														
	%														
	Mitsubishi Chemical														
	%														
	Fuji Electric														
	%														
	Sharp														
	%														
Japan total															
	%														
Overseas	HG Technologies														
	%														
	Huaian Gantech Opto-Electronics														
	%														
	Suzhou Goldengreen Technologies														
	%														
	Guangzhou A&G Optoelectronics Technology														
	%														
	APS Photoconductor (Shanghai)														
	%														
	Xerox Group														
	%														
	Lexmark International														
	%														
	Others														
	%														
Overseas total															
	%														
Total															
	%														

In 2024, the global market share of
Apart from Canon, Chinese manufa

A-2. Production bases of photoconductors

1. Japanese makers' production bases by region

1) Overall

Maker \ Region	Japan	North America	Others
Canon	Toride Plant [OPC] Nagahama Canon [OPC, Cartridge, a-Si] Canon Precision [OPC, Cartridge] Oita Canon Materials [OPC, Cartridge]	(USA) Canon Virginia [OPC, Cartridge]	(China) Canon Dalian Business Machines [OPC, Cartridge]
Yamanashi Electronics (ETRIA)	Yamanashi Electronics Numazu Plant [OPC]		(Thailand) Yamanashi Electronics (Thailand) [OPC]
FUJIFILM Business Innovation	Fuji Xerox Manufacturing Takematsu Center [OPC]		
Konica Minolta	Konica Minolta Supplies Headquarters Plant [OPC]		
Kyocera	Shiga Plant [a-Si]		
Kyocera Document Solutions			(China) Kyocera Document Technology (Shilong Plant) [OPC]
Mitsubishi Chemical	Mitsubishi Chemical High-Technica Odawara Techno Center [OPC]		(Vietnam) Vina MC Infonics [OPC]
Fuji Electric			(China) Fuji Electric (Shenzhen) [OPC]
Sharp	Nara Plant [OPC] Outsourced to Fukui [OPC]		

<Drum Substrate Market> <Coating Material Market> Sample

*Actual figures are included in the published report.

D. Coating Material Market

1. Overall summary

OPC coating materials can be broadly classified into three layers: the photoconductive layer the undercoat layer (UCL), and the overcoat layer (OCL). The photoconductive layer itself consists of a charge transport layer (CTL) and a charge generation layer (CGL). OPC materials are generally divided into negatively charged multilayer types and positively charged single-layer or multilayer types. Among these, negatively charged multilayer structures are the most widely used. While positively charged types have traditionally been single-layer, development of multilayer positive-charge types has been advancing in recent years.

<Coating materials of OPC>

Layer		Material	
Photoconductive layer	Charge Transport Layer (CTL)	Binder resin	Polycarbonate, polyarylate, etc.
	Charge Generation Layer (CGL)		
Undercoat Layer (UCL)	Thermoplastic	or a mixture o	
Overcoat Layer (OCL)	Acrylic resin,	and organic r	boron nitride.

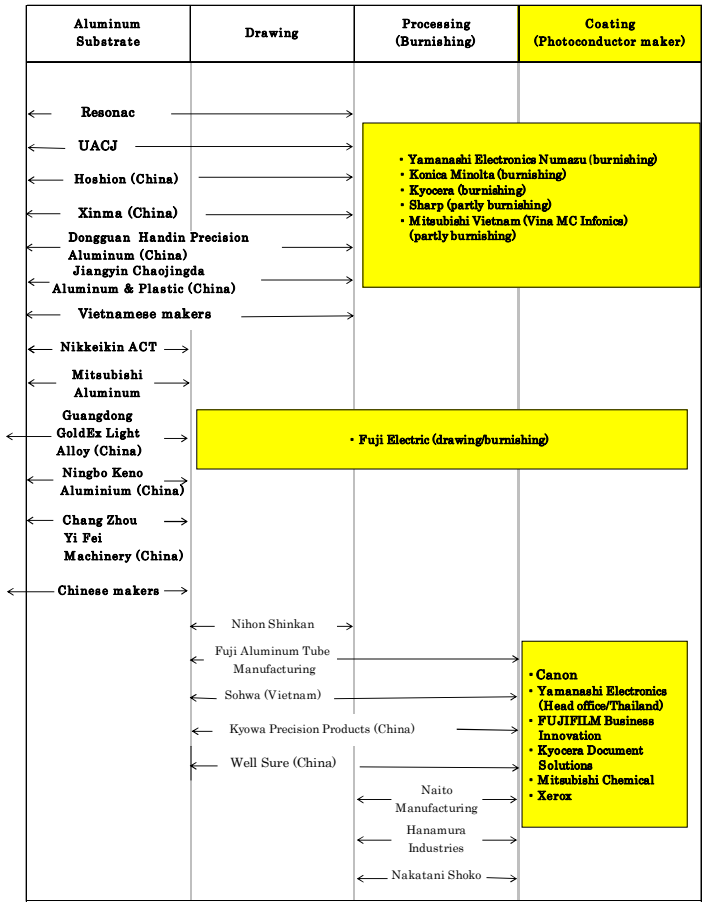
For negatively charged multila
(UCL) applied directly onto the a
top of that, and (3) a charge tr
composed of a charge generation
consists of a charge transport m
The CTL, in particular, plays a
key functional layer. Since it re
including the binder resin—drur
with coating material suppliers.
dispersed fluororesin (PTFE). H
substances, alternative material
As for positively charged single
undercoat layer (UCL), and (2)
CGM, CTM, and electron transp
multilayer types generally cons
charge generation layer.
Additionally, to improve the du
negatively and positively charge
(OCL) applied above the photoco

C. Drum Substrate Market

I. Overall trends

1. Summary of makers in the photoconductor industry (drum substrate, drawing, processing, and coating)

1) Makers by production process



＊Previously published editions of the Photoconductor Market Forecast＊

Published Date	Title
2008.3	The Comprehensive Analysis of Photoconductor Market -Current and Future Views-
2009.3	The Comprehensive Analysis of Photoconductor Market -Reviewing the Market for Photoconductor-
2010.3	The Comprehensive Analysis of Photoconductor Market -Reviewing the Market for Photoconductor-
2011.3	The Comprehensive Analysis of Photoconductor Market headed for a v-shaped recovery
2012.3	The Comprehensive Analysis of Photoconductor Market that is Multinationalizing
2013.3	The Comprehensive Analysis of Photoconductor Market Facing a Cost Cutting
2014.3	The Comprehensive Analysis of Photoconductor Market that Needs a Long-term Strategy
2015.4	The Comprehensive Analysis of Photoconductor Market that Seeks for Developing Profitability
2016.3	In Urgent Need of Review: Photoconductor Market in the Face of Reorganization of Office Equipment Industry
2017.4	Vital to Electrophotography: Photoconductor and its Transforming Market
2018.4	Future Prospects of the Photoconductor Market Moving toward Choosing Long-life Product
2019.4	China Overtakes Japan as Number One: What's Really Happening in the Photoconductor Industry
2020.4	The Future of the Photoconductor Industry: Seeking the New Chinese Market Strategy
2021.4	A Strategic Shift Is Required in the Struggling Photoconductor Industry
2022.4	The Outlook For The Photoconductor Market: An Integral Component That Maintains Its Important Role
2023.4	The Comprehensive Analysis of the Photoconductor Market: Its True Value Is Tested in Times of Change
2024.4	Comprehensive Analysis of the Photoconductor Market Facing the Industry Transformation and Restructuring
2025.4	<Standard Edition> Comprehensive Analysis of the Photoconductor Market Amid a Strategic Transition <Special Edition> (standard edition plus with a long-term forecast report)

*Back issues and partial copies of the report are also available. Please contact us for details.