Multi-Client Study

Research Proposal

【2026 Version of Roller and Roller-related Market Forecast】

"Survival Strategies in an Era of Structural Contraction and Inevitable Industry Restructuring"

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

March 2026

Data Supply Inc.

<Research Overview>

I. Research Theme

[2026 Version of Roller and Roller-related Market Forecast]

"Survival Strategies in an Era of Structural Contraction and Inevitable Industry Restructuring"

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

II. Research Purpose

1. Market Environment: Persistent Demand Contraction and Declining Profitability

Before the COVID-19 pandemic, the market for functional components used in MFPs and laser printers, such as rollers, belts, and blades, maintained annual shipments exceeding 1.5 billion units, with a total shipment value of approximately 200 billion yen. Since 2020, however, global print volumes have continued to decline, and total demand has fallen to around 80–85% of the 2019 level. In 2025, additional tariffs and the slowdown of the Chinese economy created further uncertainty. At the same time, the ongoing shift toward paperless workflows has made the contraction of print demand structural. The rapid decline of the laser printer market has had a direct impact on demand for roller-related components. In addition to weak demand, rising raw material prices and higher energy costs have placed further pressure on profitability. Because manufacturers have been unable to pass these cost increases on to customers sufficiently, the profitability of component suppliers has deteriorated significantly.

2. Industry Restructuring: Accelerating Structural Reform and Growing Procurement Risk

Industry restructuring has accelerated in the OA roller sector in recent years. In 2025, NOK sold Synztec to SMBC Capital, and in 2026 Sumitomo Riko became a wholly owned subsidiary of Sumitomo Electric Industries. Structural reforms among major companies have been occurring in succession. Restructuring has also progressed among machine manufacturers, accompanied by the reconfiguration of supply chains. Under these conditions, ensuring stable component procurement has become increasingly important for MFP and printer manufacturers. In the past, procurement policies primarily emphasized cost reduction. However, as market contraction and industry restructuring accelerate, procurement policies are shifting toward greater emphasis on supply stability. As a result, suppliers' business continuity is becoming an important criterion in procurement decisions.

3. Technological Trends: Evolution of Fusing Technology and Stagnation in PFAS Regulation Response

While the market is shrinking, development of fusing systems—one of the core technologies in MFPs and printers—continues. In particular, belt-type fusing systems using ceramic heaters offer advantages such as fast startup, low energy consumption, and compact design, and manufacturers are seeking to expand their adoption.

At the same time, responding to increasingly stringent PFAS regulations, particularly in Europe and the United States, has become a major challenge for the industry as a whole. Fluorinated materials used in fuser belts and rollers are difficult to replace because they provide heat resistance, release properties, and durability. As a result, achieving PFAS-free fusing presents significant design challenges. Consequently, there has been little clear progress toward practical implementation at present, and the gap between tightening regulatory schedules and technological development is becoming a potential risk factor.

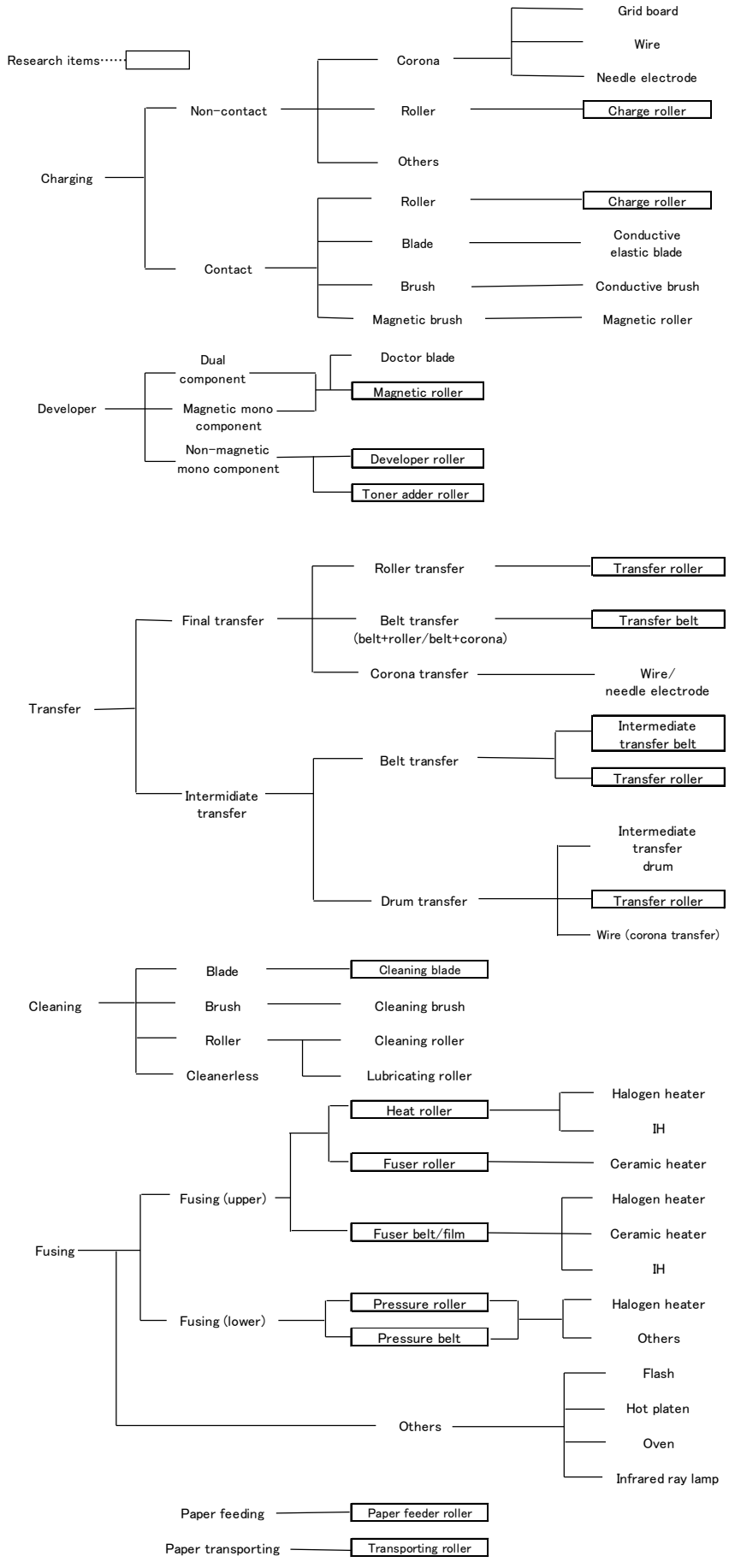
4. Publication of the 2026 Version of Roller and Roller-related Market Forecast

The 2026 Version of Roller and Roller-related Market Forecast marks the 21st publication in this series. This version systematically organizes the current status and strategies of both specialized manufacturers and in-house producers in Japan and overseas, by process categories such as charging, development, transfer, fusing, cleaning, and paper feeding and transport.

The report aims to provide foundational data useful for business operations and procurement strategies of industry stakeholders by objectively analyzing supply–demand trends in this mature market, the business conditions of major manufacturers, and changes in the supply chain as industry restructuring accelerates. It is our hope that this report will continue to serve as a useful reference for decision-making.

III. Survey Items and Survey Targets

1. Survey Items



2. Survey Targets

2-1. Specialized Roller Manufacturers

Japanese manufacturers **(31)** / South Korean manufacturers **(5)** / Chinese manufacturers **(47)** / Hong-Kong manufacturers **(1)** / Taiwanese manufacturers **(3)** / Others **(7)** / In-house manufacturers **(4) (98 manufacturers in total)**

2-2. Hardware Machine Manufacturers **(Major 15 Manufacturers)**

MFP manufacturers / Printer manufacturers

IV. Survey Scope and Methods

1. Survey Coverage Period

From 2023 to 2029

2. Survey Methods

1) Interviews with target manufacturers conducted through direct visits (including web-based surveys)

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: March and April 2026
3. Scheduled Publication Date: **Available upon request**
4. Report Format: PDF
5. Report Price: **$5,000-**
6. Survey Conducted by:

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7. How to order:

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

VI. Survey Categories

A. Comprehensive Analysis

A-1. Overall market trends for functional components
1. Shipment trends by Japanese/overseas manufacturers (2023–2029)
2. Shipment volume and shipment value by process (2025)
3. Shipment value share of roller manufacturers (2025)
4. OEM/third-party ratio by component (2025)
5. Restructuring trends among major component manufacturers

A-2. Market trends by component
1. Shipment volume (2023–2029)
2. Shipment value (2023–2029)
3. Market trends by application (2025/2029)
4. Market trends by size (2025/2029)
5. Market trends by material (2025/2029)
6. Technology and material trends by component
7. Price trends and product lifespan
8. Shipment status of components for production printers and wide-format printers
9. Production sites by component and manufacturer (2025 results)
10. List of manufacturers in the roller-related component market (2025 results)
11. Number of components used by system type
12. Latest trends of manufacturers by process
    12-1. Overview of processes by manufacturer
    12-2. Manufacturer trends by process
    12-3. Latest developments by individual manufacturer
    Canon / ETRIA (Ricoh) / ETRIA (Toshiba TEC) / ETRIA (OKI) / FUJIFILM Business Innovation / Konica Minolta / Sharp / Kyocera Document Solutions / Brother Industries / Muratec / HP Printing Korea / Lexmark / Pantum / Lenovo / Deli

A-3. Hardware shipment trends
1. Shipment units by hardware type (copiers/printers)
2. Shipment units by hardware manufacturer and printing method (2025)
    2-1. Copier shipment units
    2-2. Laser/LED printer shipment units

A-4. Production sites of system manufacturers/component manufacturers in China and Southeast Asia

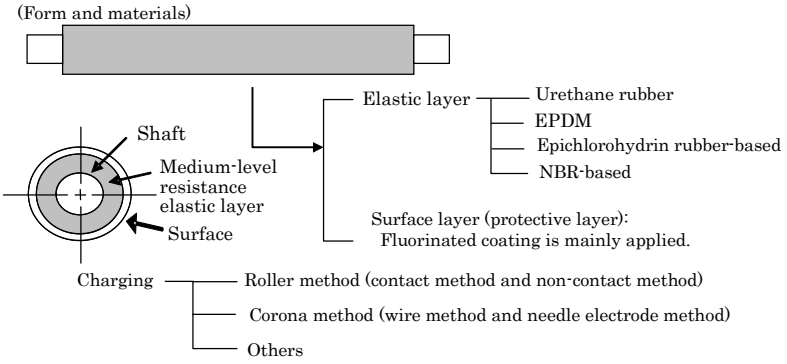
A-5. Supply list by major copier/printer manufacturer and component manufacturer (2025 results)
Canon / ETRIA (Ricoh) / ETRIA (Toshiba TEC) / ETRIA (OKI)/ FUJIFILM Business Innovation / Konica Minolta / Sharp / Kyocera Document Solutions / Brother Industries

B. Component Market

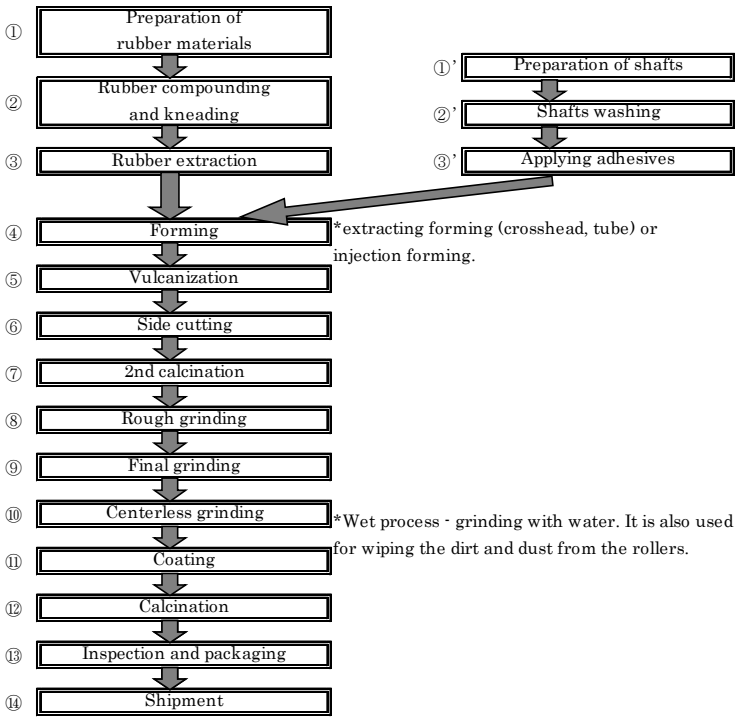
[1] Charge roller

- Market size (2024): Unit shipments were approx. 300 million units; shipment value was approx. 29.8 billion yen.
- Materials: Epichlorohydrin rubber, EPDM, and urethane rubber among others.
- Development themes: maintaining charging performance, improving toner release properties, and cost reduction.

1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) 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 (2023–2029) 1) EPDM 2) Epichlorohydrin rubber-based 3) Urethane rubber 4) NBR-based/ 7. Technology and material trends in charge rollers 1) Layer structure 2) Methods of controlling electrical resistance 3) Future outlook for materials/ 8. Price trends, lifespan, and manufacturing methods for charge rollers/ 9. Supply destinations for charge rollers (Japan and overseas)/ 10. Production site trends for charge rollers (Japan and overseas)



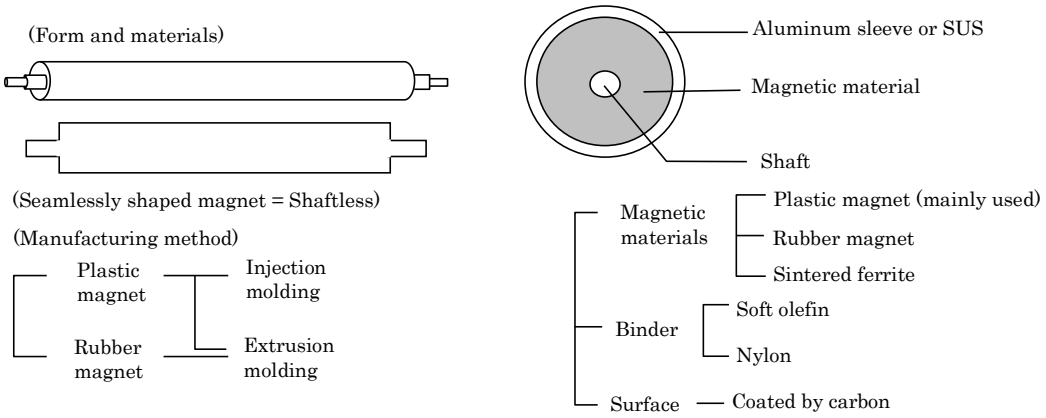
Manufacturing process of the charge roller



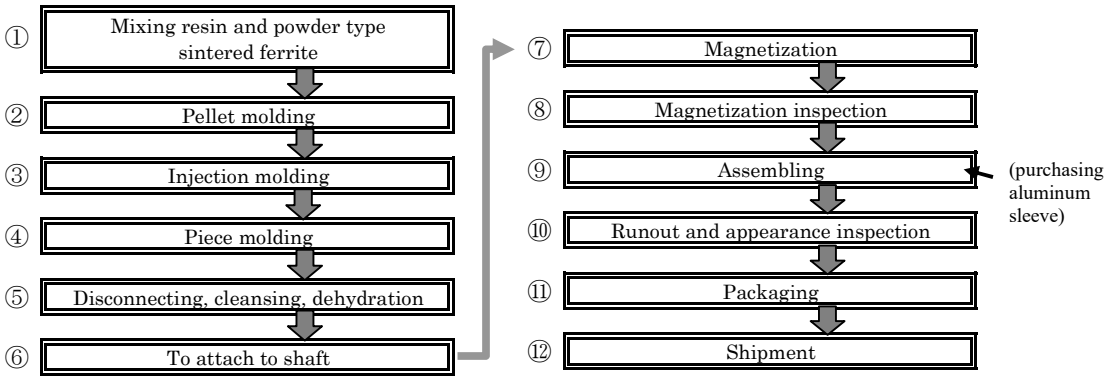
[2] Magnetic roller

・Market size (2024): Unit shipments were approx. 200 million units; shipment value was approx. 31.2 billion yen.
・Materials: Plastic magnets are primarily used; however, a mixture of various materials from both plastic and rubber magnets is also employed.

1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) 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 (2023–2029) 1) Plastic magnet 2) Rubber magnet 3) Sintered ferrite 4) Combined types/ 7. Technology and material trends in 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)



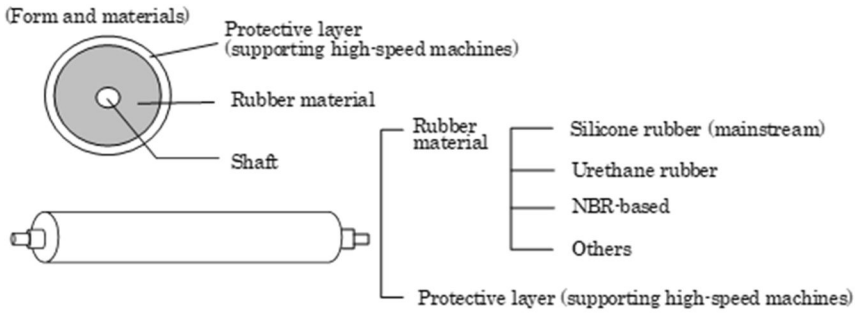
Manufacturing process of the magnetic roller (shaft attaching type)



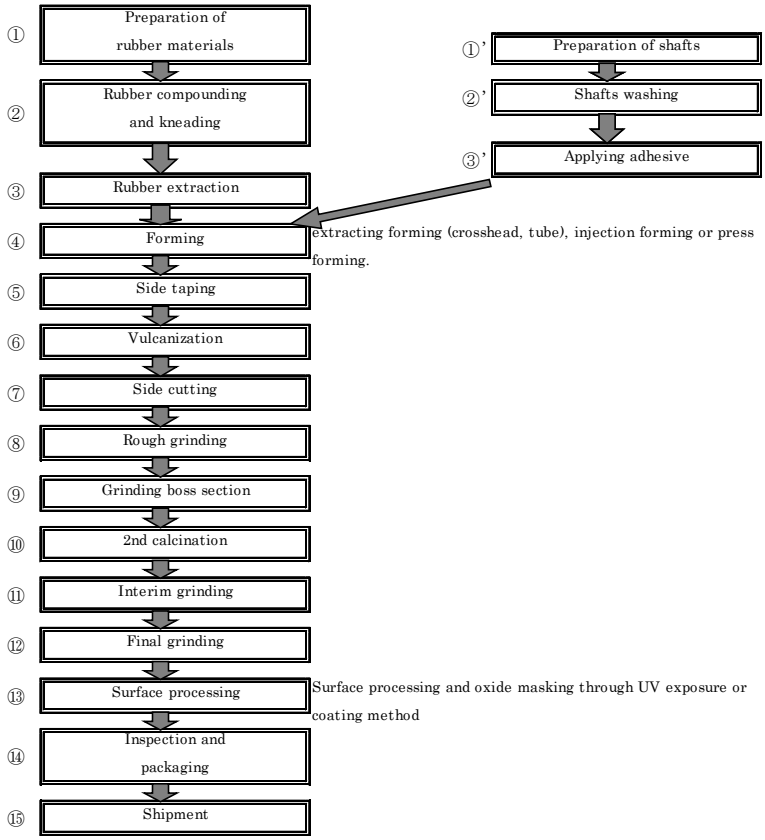
[3] Developer roller

・Market size (2024): Unit shipments were approx. 190 million units; shipment value was approx. 26.1 billion yen.
・Materials: Silicone rubber, urethane rubber, and NBR among others.

1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) 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 (2023–2029) 1) Silicone rubber 2) Urethane rubber 3) NBR-based/ 7. Technology and material trends in 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

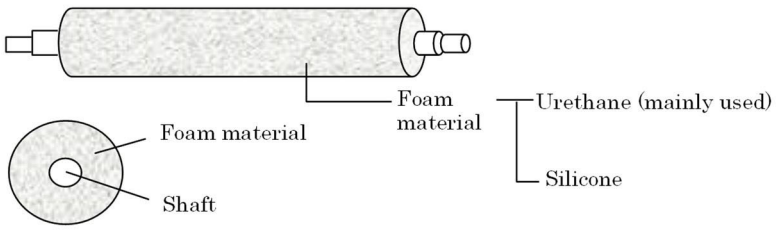


[4] Toner adder roller

- Market size (2024): Unit shipments were approx. 190 million units; shipment value was approx. 11.2 billion yen.
- Materials: Urethane foam

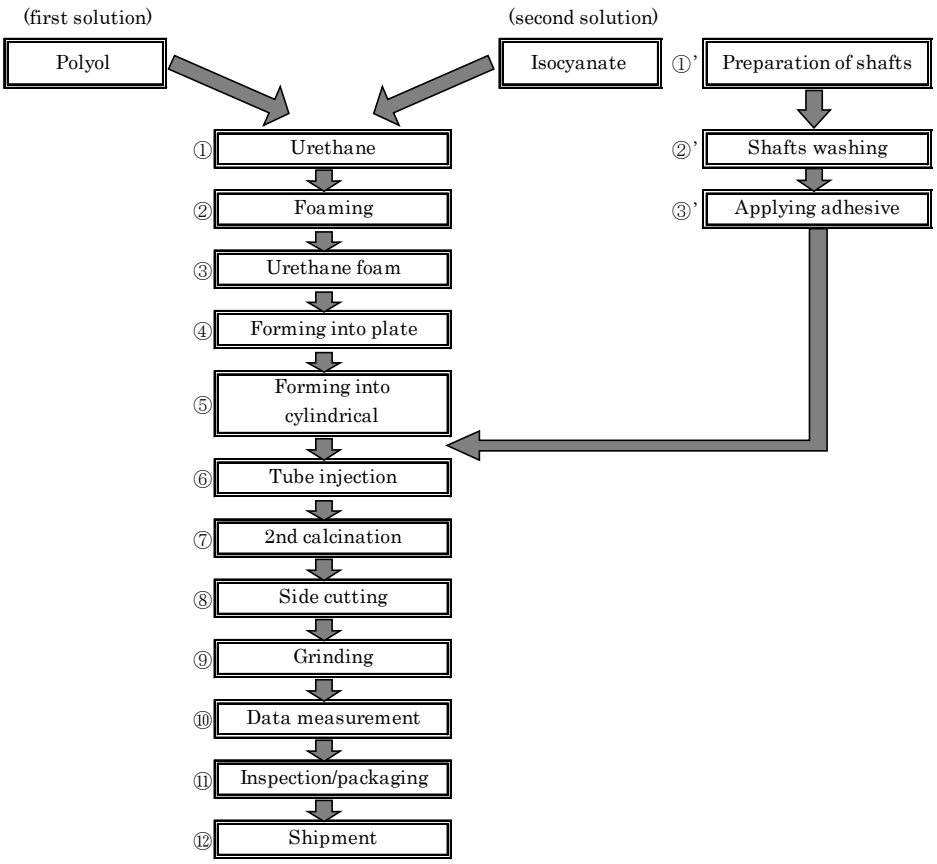
1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2023–2029) 1) Urethane foam 2) Silicone foam/ 7. Technology and material trends in 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)

(Form and materials)



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

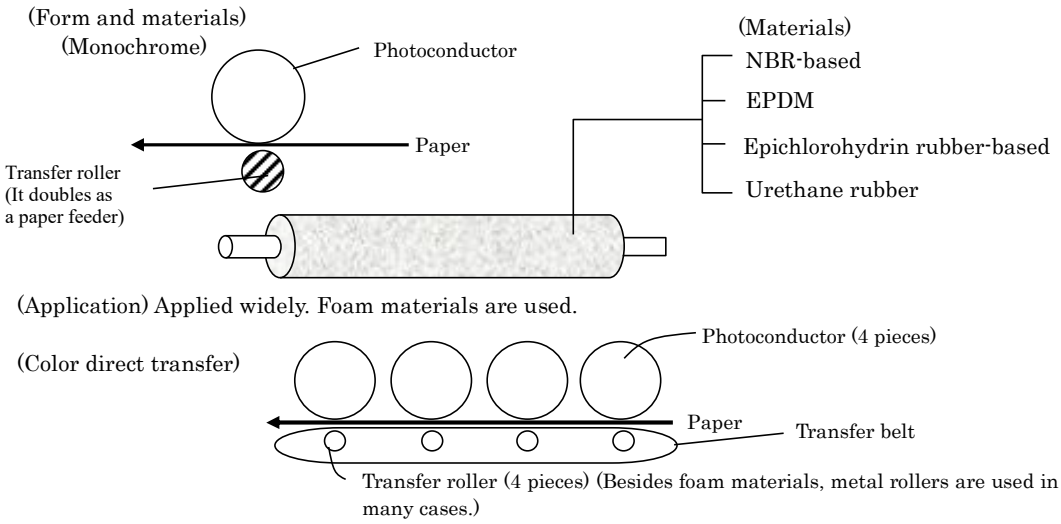
Manufacturing process of the toner adder roller (urethane foam)



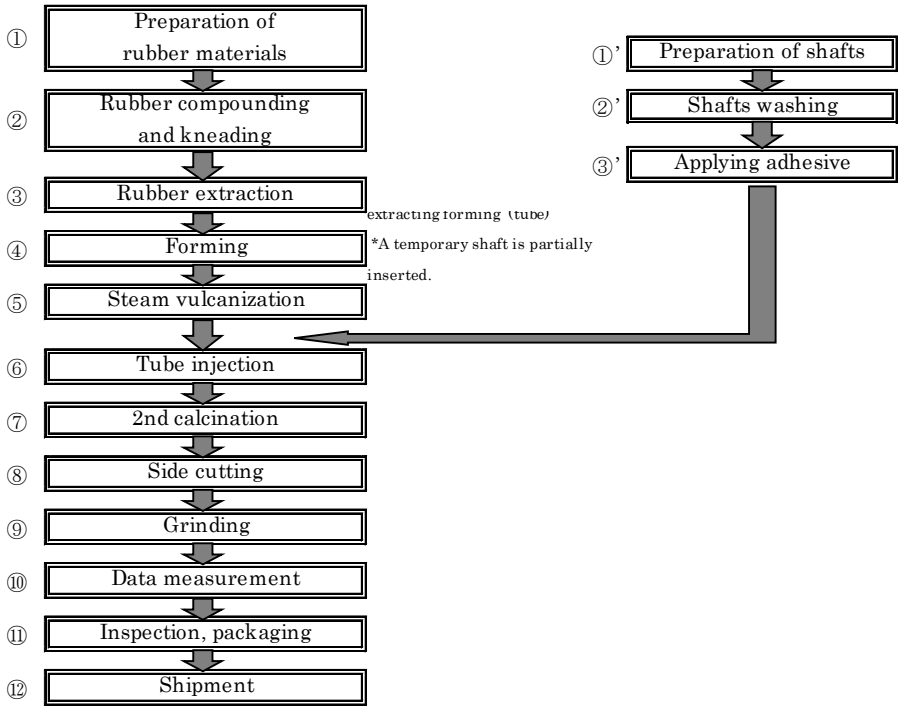
[5] Transfer roller (including the first and second transfer)

- Market size (2024): Unit shipments were approx. 61 million units; shipment value was approx. 8.8 billion yen.
- Materials: NBR, epichlorohydrin rubber, urethane rubber, and EPDM.

1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) 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 (2023–2029) 1) NBR-based 2) Epichlorohydrin rubber-based 3) Urethane rubber 4) EPDM/ 7. Technology and material trends in 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)



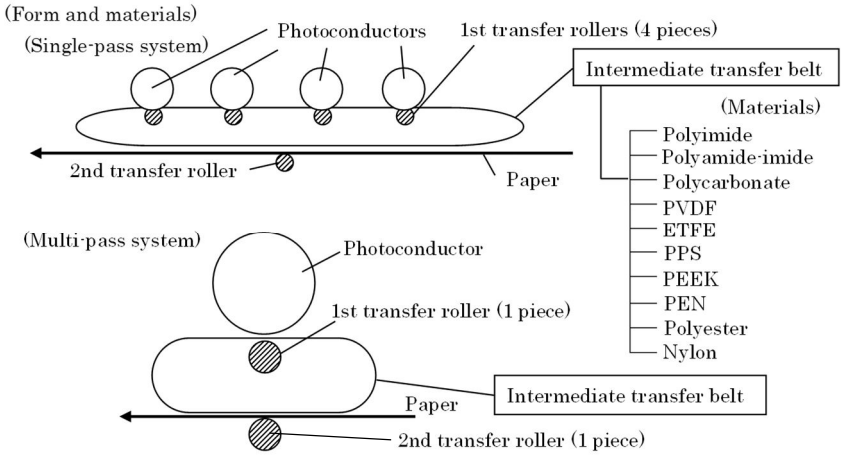
Manufacturing process of the transfer roller



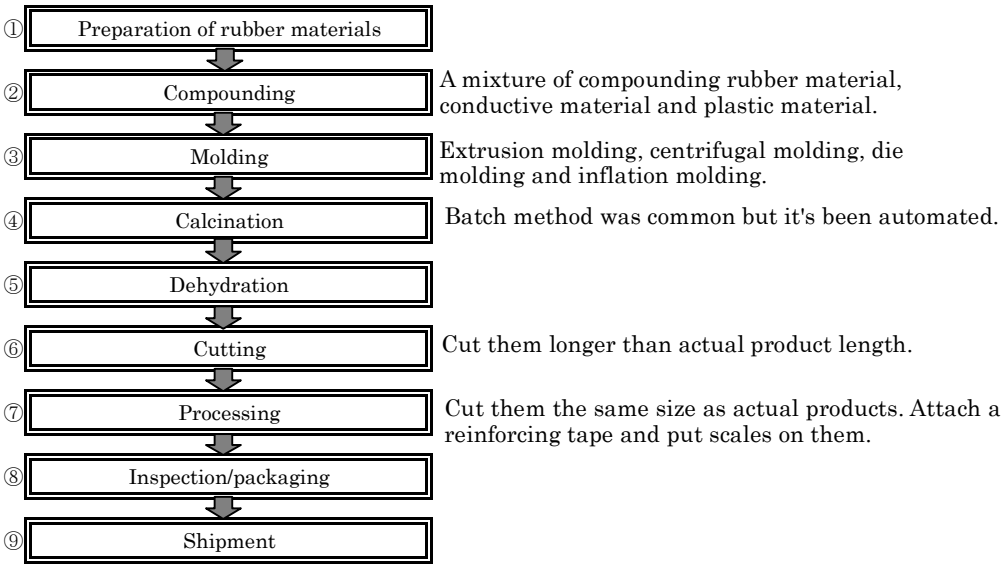
[6] Intermediate transfer belt

- Market size (2024): Unit shipments were approx. 10 million units; shipment value was approx. 12.6 billion yen.
- Materials: PI, PAI, PEN, and PET among others.

1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) 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 (2023–2029) 1) Polyimide 2) Polyamide-imide 3) Polycarbonate 4) ETFE 5) PPS 6) PVDF 7) PEEK 8) Polyester 9) Others/ 7. Technology and material trends in 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

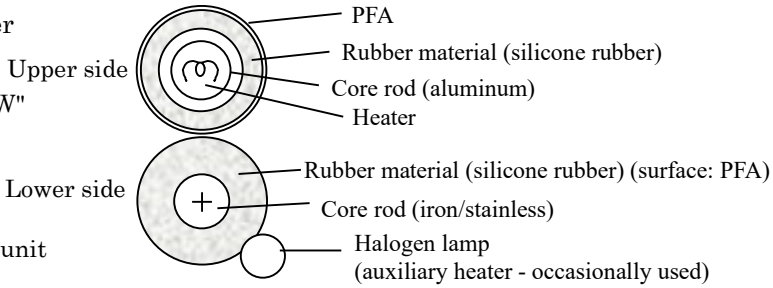
- Market size (2024): Unit shipments were approx. 21 million units; shipment value was approx. 8.7 billion yen.
- Materials: A hard roller with fluorine coating applied to the core rod, and a soft roller with a layer of silicone rubber and fluorine coating over the core rod.

1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) 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 (2023–2029) 1) Hard rollers (PFA/PTFE) 2) Soft rollers (silicone rubber+PFA)/ 7. Technology and material trends in 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)

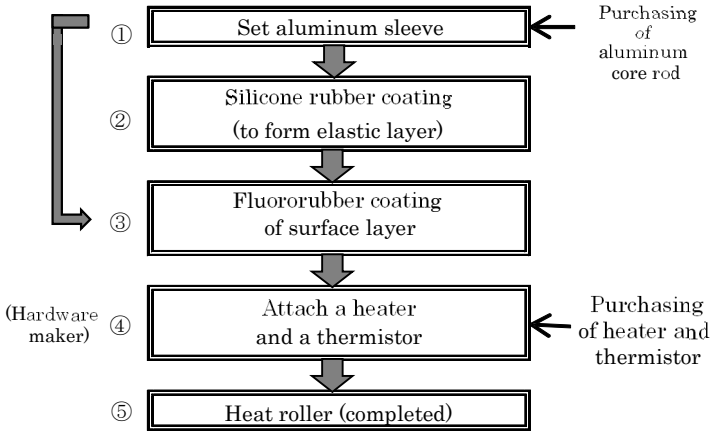
<Form and materials>
1. Heat roller + pressure roller

(Application)
*Brother Industries "MFC-L3780CDW"
*HP "Laser MFP 115w"
*Kyocera DS "ECOSYS PA2600cwx"

<Number of pieces>
Upper and lower side: 1 piece per unit



Manufacturing process of the heat roller

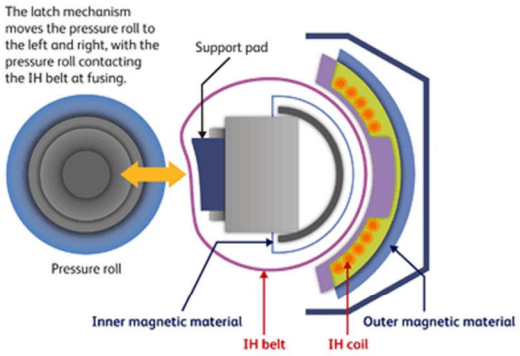


[8] Fuser belt/film

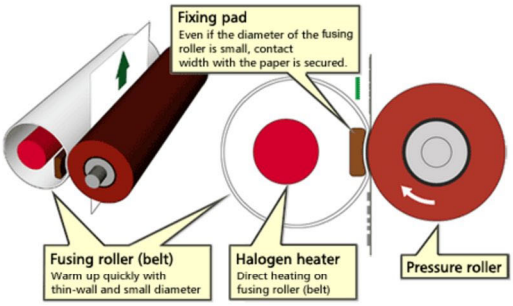
- Market size (2024): Unit shipments were approx. 25 million units; shipment value was approx. 18.8 billion yen.
- Materials: Polyimide, nickel, and SUS.

1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) 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 (2023–2029) 1) Polyimide 2) Nickel 3) SUS 4) Others/ 7. Technology 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)

1. 1 Axis type

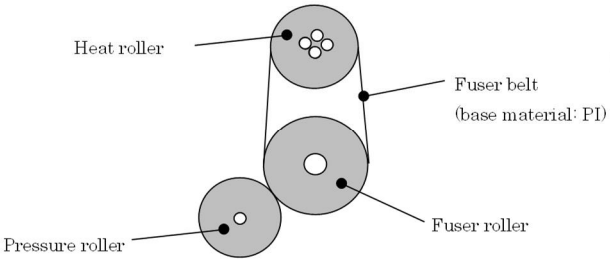


FUJIFILM BI "Apeos C6571"

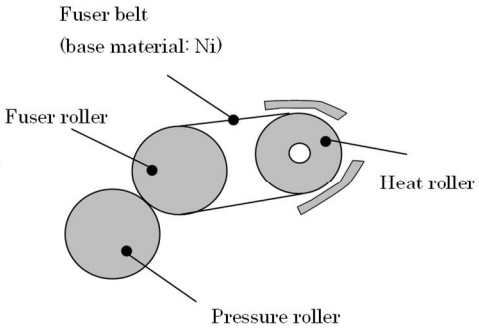


Ricoh "RICOH IM C6010SD"

2. 2 Axis type

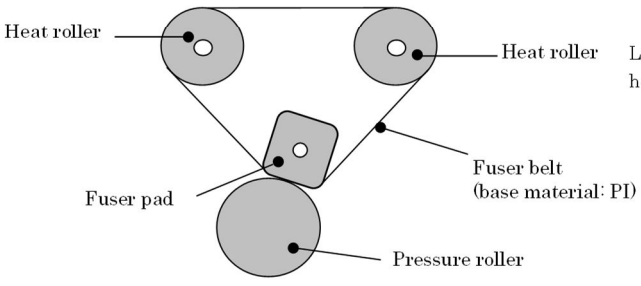


Konica Minolta "AccurioPress C4080"

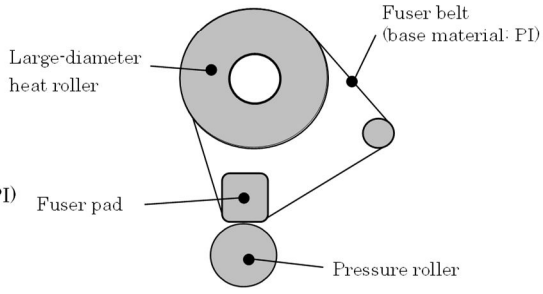


Ricoh "RICOH Pro C7500"

3. 3 Axis type



FUJIFILM BI "Versant 4100"



Canon "imagePRESS V1350"

[9] Pressure roller/belt

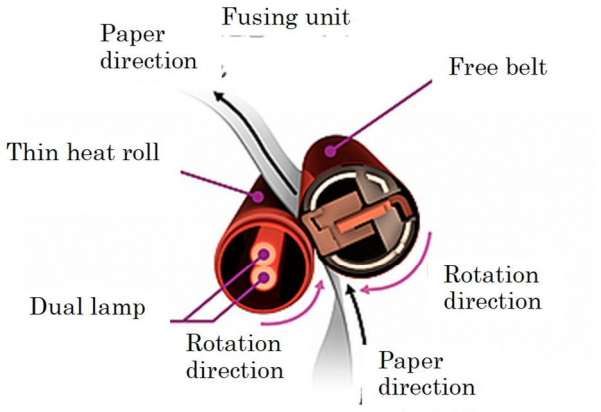
- Pressure roller market size (2024): Unit shipments were approx. 47 million units; shipment value was approx. 24 billion yen.
- Materials: Silicone rubber. The surface layer is fluorine-coated.
- Pressure belt market size (2024): Unit shipments were approx. 0.98 million units; shipment value was approx. 300 million yen.
- Materials: PI and PEEK. The surface layer is fluorine-coated.

1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) 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 (2023–2029) 1) Silicone rubber+PFA/ Others (pressure rollers) 2) Polyimide (pressure belts)/ 7. Technology and material trends in pressure rollers 1) Layer structure 2) SupporLt for heater-equipped machines 3) Future outlook for materials/ 8. Technology and material trends in 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)

Heat roller + pressure belt

(Application)
*FUJIFILM BI "ApeosPrint C4030"
*Konica Minolta "bizhub 4751i"
*Brother Industries “MFC-L9670CDN”

<Number of pieces>
Upper and lower side: 1 piece per unit

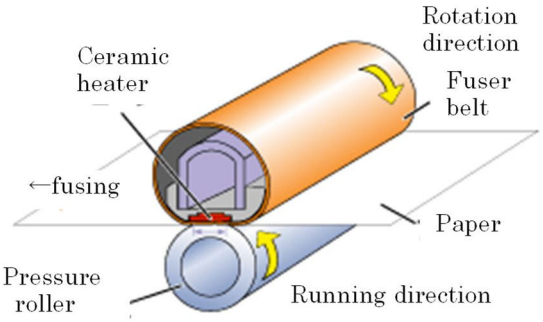


Free belt nip fuser technology (FBNF)

Fuser film + pressure roller

(Application)
*HP "Color LaserJet Pro 3301cdw"
*Lexmark "CX950se"

<Number of pieces>
Upper and lower side: 1 piece per unit



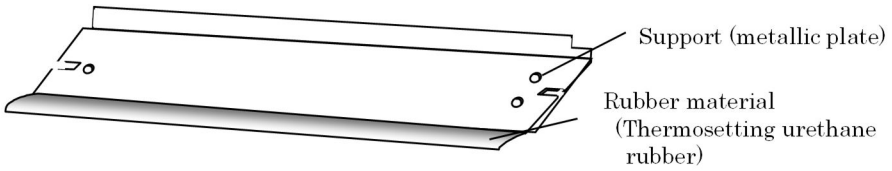
[10] Cleaning blade

- Market size (2024): Unit shipments were approx. 270 million units; shipment value was approx. 17.3 billion yen.
- Materials: Polyurethane rubber

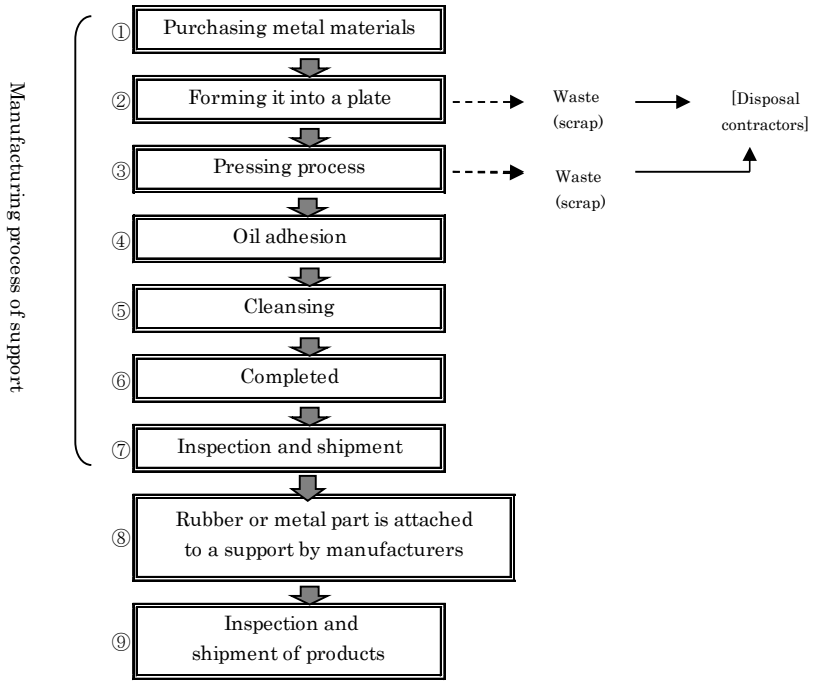
1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) by application (monochrome/color) and by size (A4/A3)/ 5. Shipment trends for production printers (volume and value)/ 6. Shipment volume and value trends by material (2023–2029) 1) Polyurethane rubber/ 7. Technology and material trends in cleaning blades 1) Support plates 2) Contact surface 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.

(Form and materials)



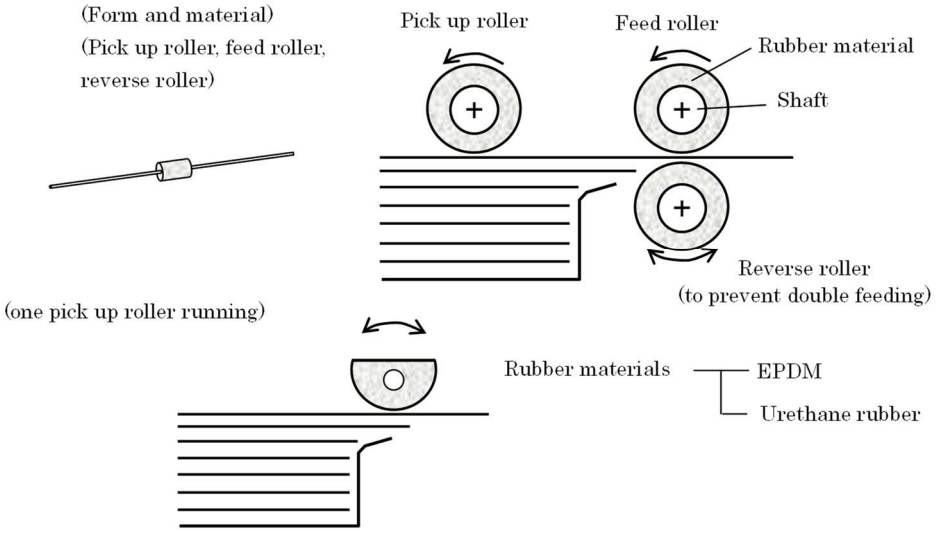
Manufacturing process of the cleaning blade



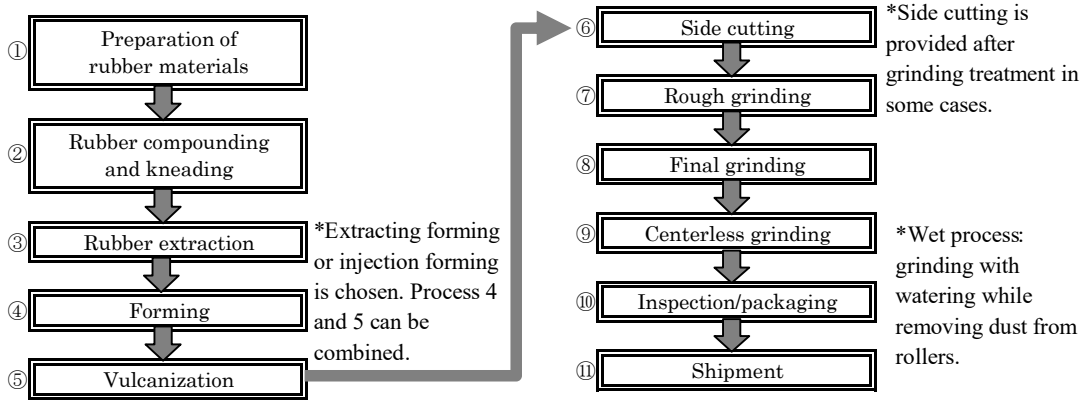
[11] Paper feeder roller

- Market size (2024): Unit shipments were approx. 180 million units; shipment value was approx. 7.4 billion yen.
- Materials: EPDM and urethane rubber.

1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) 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 (2023–2029) 1) EPDM 2) Urethane rubber/ 7. Technology and material trends in 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

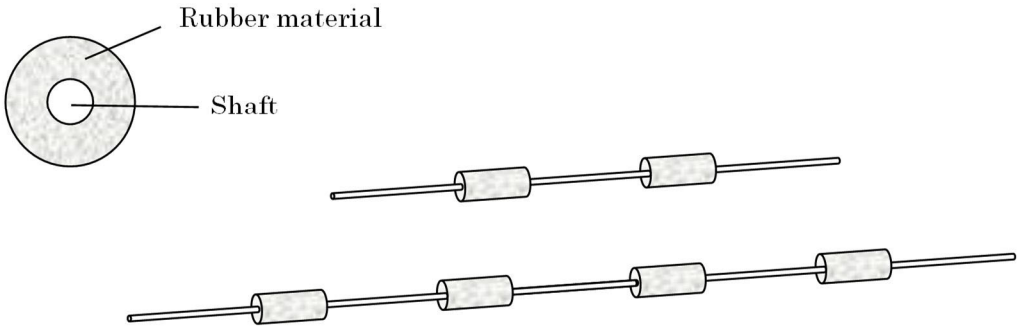


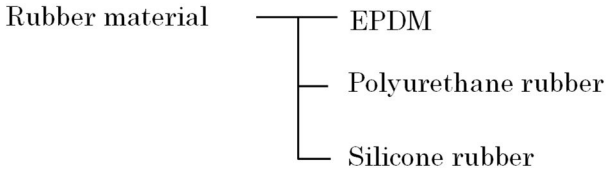
[12] Transporting roller

- Market size (2024): Unit shipments were approx. 270 million units; shipment value was approx. 15.2 billion yen.
- Materials: EPDM

1. Component structure diagram/ 2. Manufacturing process diagram/ 3. Shipment volume and value trends by manufacturer (2023–2029) 1) Genuine component market 2) Third-party component market/ 4. Shipment volume and value trends (2023–2029) 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 (2023–2029) 1) EPDM 2) Silicone rubber 3) Polyurethane rubber/ 7. Technology and material trends in 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 Manufacturers (specialized manufacturers/in-house manufacturers)

Main survey targets

(Japanese specialized manufacturers)

Archem / I.S.T / Arai Seisakusho / Inoac Corporation / SWCC / Synztec / 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 / Meiji Rubber & Chemical / Yamauchi / Others

(In-house manufacturers)

Canon / ETRIA / FUJIFILM Business Innovation / Konica Minolta

(Overseas specialized manufacturers)

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 (2023–2029)
   (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 (2023–2029)
   (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 (2023–2029)
   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. Technology 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.

6. Technological and material trends by component

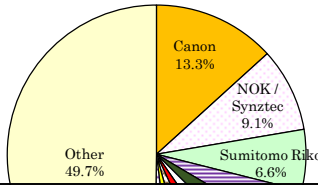
Component	Technological and material trend
Charge Roller	The main structure is multi-layered (double or triple). As for rubber material, EPDM, epichlorohydrin rubber-based, and urethane rubber are used. Each material is required to improve performance such as maintaining of chargeability, stability of resistance, and toner releasability. Technology-wise, this is a field where Japanese manufacturers maintain their technological superiority, which can hardly be replaced by Chinse local makers.
Magnetic Roller	Ferrite magnet is the most used magnetic material. By type, plastic magnet accounts for 74% of the total and rubber magnet 26%. They are combined when used. As for binder, nylon-based products are mainly used for a hard type, and olefin-based products can be used
Developer R	
Toner Adde Roller	
Transfer Ro	
Intermediat Transfer Be	
Heat Roller	
Fuser Belt	
Pressure Ro	
Pressure Be	
Cleaning Bl	
Paper Feed Roller	
Transportin Roller	

3. Market share of shipment value by roller maker (2024)

1) For copier/LBP

Unit: 100 million yen

	2024	%
Canon		
NOK / Synztec		
Sumitomo Riko		
Fancy (China)		
Yamauchi		
Teamsung (China)		
SWCC		
Sumitomo Rubber Indust		
Archem		
Inoac		
Other		
Total		

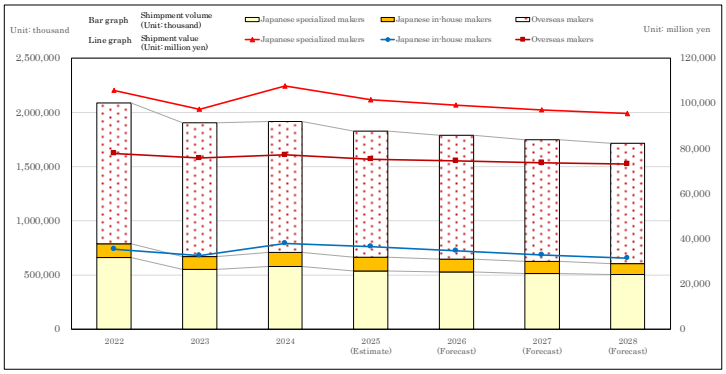


Total shipment valu
in 2024 was approxi
The manufacturer
on year), followed by
and Sumitomo Riko
declines, with Canon
Fancy of China (8.4 b
Rubber Industries (
INOAC (4.1 billion
companies; in the tw
are three companies:

2) For ATM and inkjet
Compared to copier
printers are small in
The value for ATMs
are: NOK/Synztec (8
million yen/year), Ba
million yen/year), an
The market for inkj
Industries (three bil
the market include:
(800 million yen/ye
Systems: 500 millio
Industries (400 milli

A. Comprehensive Analysis
A-1. Overall market trends in functional components
1. Shipment trends by Japanese and overseas makers (2022-2028)

		2022	%	2023	%	2024	%	2025 (Estimate)	%	2026 (Forecast)	%	2027 (Forecast)	%	2028 (Forecast)	%
Shipment volume (Thousand)	Specialized maker														
	%														
	In-house maker														
	%														
	Total of Japanese makers														
	%														
	Total of overseas makers														
	%														
	Total														
	%														
Shipment value (Million yen)	Specialized maker														
	%														
	In-house maker														
	%														
	Total of Japanese makers														
	%														
	Total of overseas makers														
	%														
	Total														
	%														



＊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
2025 (Available upon request)	"Strategies and Outlook for the Components Industry in an Era of Uncertainty and Transformation"	$5,000	388