

INDUSTRY REPORTS & INSIGHTS

PRODUCTION PRINTING REPORT

InfoSource has recently published its Production Printing Report, providing detailed analysis of the B&W and colour, cut-sheet (CS) and continuous feed (CF) production printer and digital press market in Europe. The report includes discussion and analysis of market development and trends, products, companies and partnerships, as well as reviews of around 30 leading manufacturers in the digital production printing industry and additional observations relating to drupa.

In spite of tough economic conditions continuing to cause issues with funding, reducing market confidence and generally tending to result in the delay of purchase decisions for high-performance systems, research by infoSource indicates overall sales growth for the production printing market of around 5% in first half 2012, compared to the same period in the previous year. This includes a slight increase in B&W CS sales, with ongoing demand for high-volume transaction printing and the development of markets such as short-run book and manual production.

Steady sales growth continued for the colour CS production printer and digital colour press market in first half 2012, boosted by new ranges of toner-based light production devices, and there was a double-digit increase - led by inkjet-based systems - for the colour press CF market, targeted at a wide range of applications, from TransPromo, general commercial print and publishing, to labels and packaging. Full year 2011 marked the point where colour production sales overtook those of B&W production devices, with rapid growth for both CS and CF colour presses compared to the previous year.

As well as its surveys of the production printing market on a quarterly basis in terms of sales and market value, brand, manufacturer and model, infoSource publishes data on the estimated installed base of equipment and on annual print volumes both by category and brand.

In terms both of sales and market value, infoSource's research showed Xerox remaining overall market leader for the production printing market in full year 2011, as well as for

B&W CS production printer and CS colour press sales, with the latter including the Color 1000 Press and iGen 4. Konica Minolta is mounting a strong challenge in 2012, and has moved into first place during the first half of the year in terms of unit sales, with a dominant market share of the colour CS printer market with light production devices such as the bizhub PRO C6000L. Ricoh has moved up to third place in terms of overall sales in first half 2012, making gains in terms of the CS colour press market with its toner-based Pro C651EX. Xerox remains the clear leader in terms of the estimated installed base by brand at end of year 2011. Konica Minolta is starting to close the gap on second-placed Canon, with a steady increase in its installed base in FY2011 as its colour product ranges move further up the performance scale into the production arena. Océ is by some way the market leader in terms of print volumes for the total production printer installed base in Europe, primarily due to its large installed base of high-volume B&W continuous feed printers.

Annual print volumes for digital production printers are continuing to grow steadily; the total estimated installed base in Europe produced just over 250 billion impressions in full year 2011. Print volumes are based on infoSource's best estimates of average monthly print volume (AMPV) by model. Annual print volumes for the installed base of color cut-sheet and continuous feed presses are growing much more rapidly, with new generations of inkjet-based continuous feed presses with AMPVs rated in millions of impressions per month.

