

The Office Printing Market Today...and Tomorrow

Office Printing: A Market in Transition

Market Summary

- Industry consolidation between the printer and copier industries has created an ultra competitive environment
- While the enterprise hardware market is peaking with limited new printer placements, the small and medium business (SMB) market is a prime target for growth with new placements for color printers

Category Summary

- As the office printing market has matured, advancements in ink and laser printing, workflow solutions and business models have continued
- Inkjet technology has evolved and will cause some market disruption by offering affordable color printing for SMBs and small workgroups

Product Consolidation

- Letter/Legal (A4) and Tabloid (A3) copiers and printers are converging with Managed Print Services (MPS)
- Inkjets and lasers are increasingly co-existing in the office, with solutions differentiated by various software

Business Model Evolution

- Vendors and resellers are marketing to SMB with many options to purchase printers, including leasing, click-charge and MPS solutions
- With new printer acquisition contract options, IT and business managers jointly affect the product purchase decision



How **Inkjet Technology** Will Disrupt the Laser Printer Market.



Costs

- Inkjet printers have lower costs for supplies, printing and service than comparable laser printers

Imaging

- In an inkjet printer, paper (media) does not touch the ink delivery system (print mechanism)
- Inkjet printers support a broader range of paper types

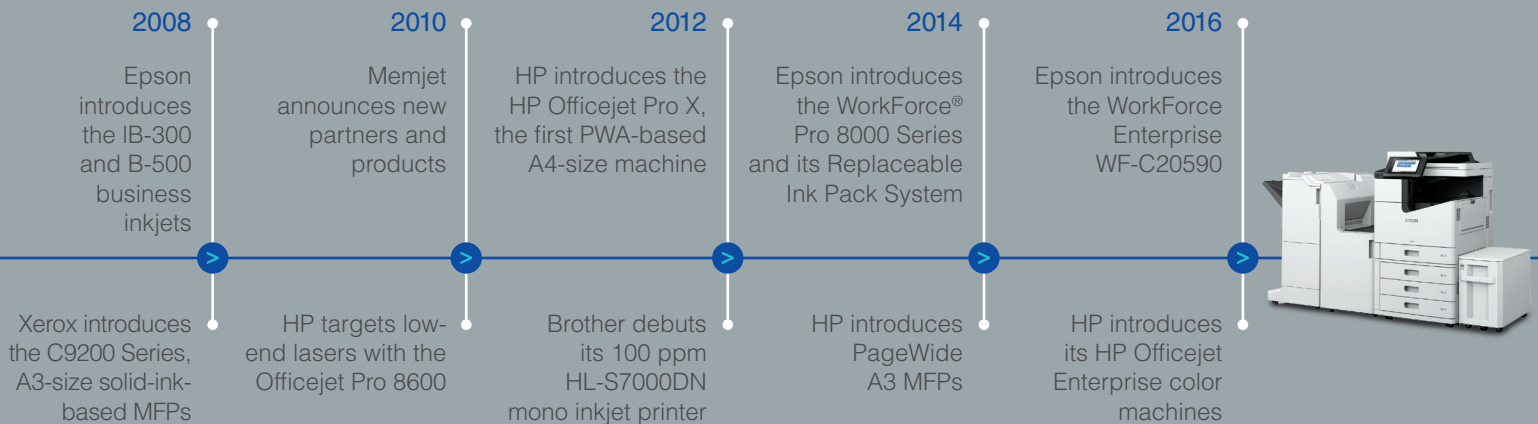
Serviceability

- Inkjet printers are less complex, with fewer break points and serviceable parts
- Inkjet printers are reliable and designed for business applications

Sustainability

- Inkjet printers offer lower energy consumption because they don't need heat to melt toner at high print speeds
- Inkjet printers produce less waste than comparable laser printers because there are fewer imaging components to replace

Source: IDC, 2017*

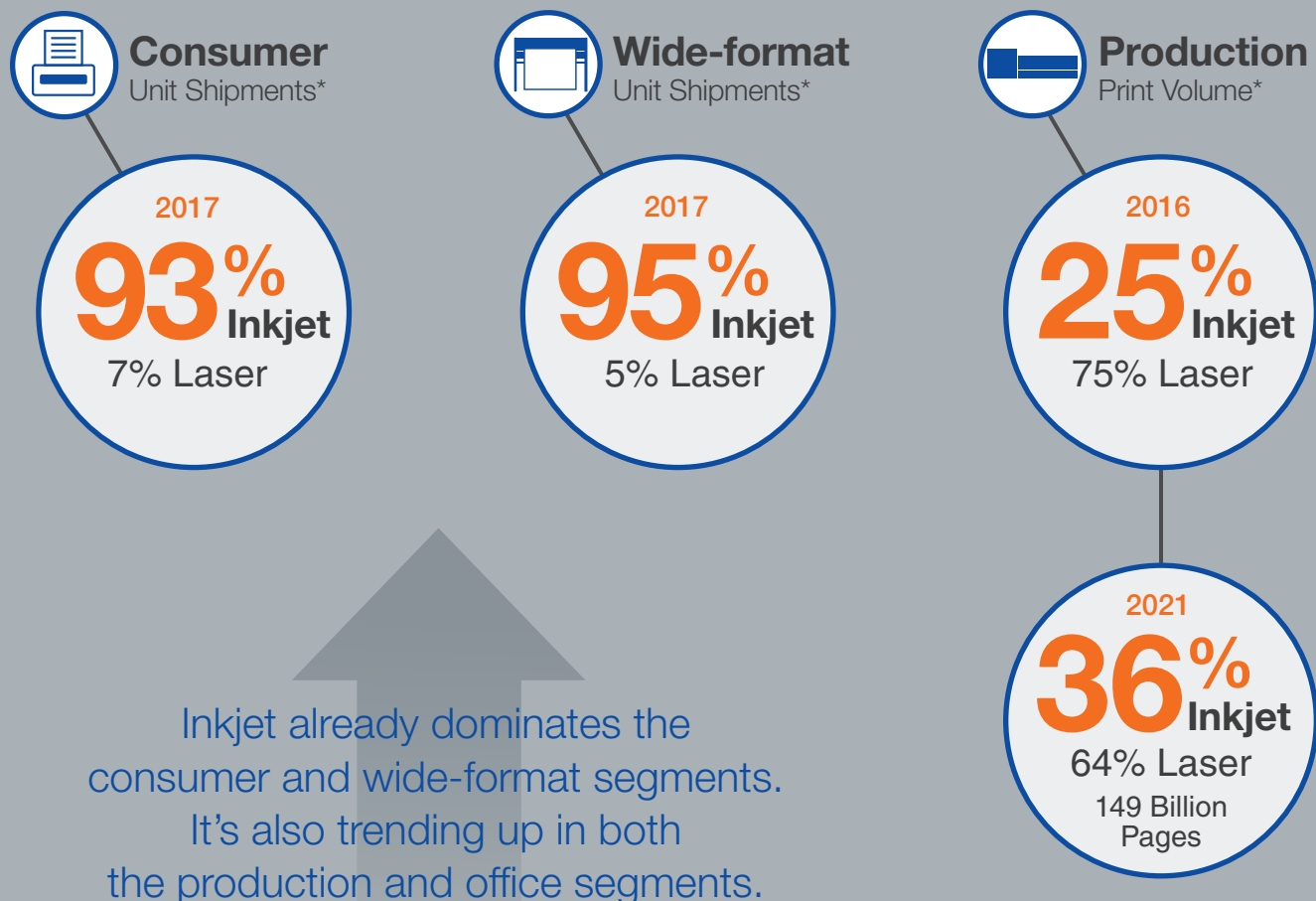


Inkjet Technology is Gaining vs. Laser in All Markets

Inkjet: Penetration by Market Segment

Inkjet Wins Once Established in a Market*

- Inkjet is the market standard in consumer and wide-format shipments
- Inkjet is doubling in production print volume — from 25% to 36% by 2021

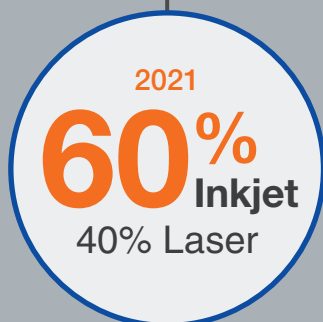
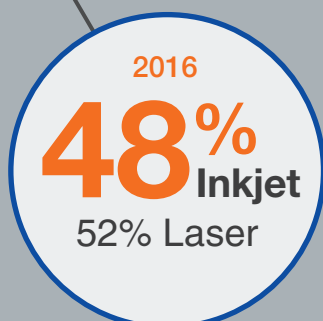


Conclusion:

Why Inkjet, Why Now?

Inkjet Will Win in the Office

- Inkjet is already 48% of office printer shipments, including Small Office
- By 2021, Inkjet will grow to over 60% of office shipments, with the growth coming from workgroups and SMB



Growth expected from
workgroup color printers/MFPs.

Market Forces Create the Perfect Environment for Office Inkjets

- Disruptive technology
- Solutions-enabled
- Disruptive business models
- Affordable, everyday color printing

Need more information on how Epson can help you get the most out of business inkjet printing solutions? Call **1-866-374-5822**, or visit [Epson.com/WorkforcePrinters](https://www.epson.com/WorkforcePrinters).

* Source IDC, 2017 (Based on extrapolation from IDC Inkjet Forecast data, includes SOHO and SMB Market) — Consumer Unit Shipments: IDC Worldwide Single-Function Printer Forecast, 2017-2021, IDC Worldwide Multifunction Peripheral Forecast, 2017-2021; Wide-Format Unit Shipments: IDC North America Large-Format Printer Market Shares, 2017-2021; Production Print Volume: IDC U.S. Production Page Volume Forecast 2017-2021; Office Unit Shipments: IDC Worldwide Single-Function Printer Forecast, 2017-2021, IDC Worldwide Multifunction Peripheral Forecast, 2017-2021



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