

## **RATING OF LASER CARTRIDGES IN RUSSIAN STATE ORGANIZATIONS IN 2012**

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Information Agency «BUSINESS-INFORM» has finished making and filling of Electronic Tables (ET)\* developed to collect data about state procurements of printing devices and supplies in 2012. In the supplies section of ET for every closed deal there are seller and buyer registered, their contacts, the date of deal summation, sum of purchase, its basic components (the number of supplied cartridges from the list of 200 items for monochrome printing and the same from the list of 50 sets for laser-printing). Filling the tables with the ET information about state purchases for in 2012 allowed not only to evaluate the corresponding segment of Russian supplies market for laser-printing, but also to receive the evaluation of demand for each of 200 listed cartridges for monochrome printing and each of 50 cartridge sets for color printing from the point of view of the state structures.

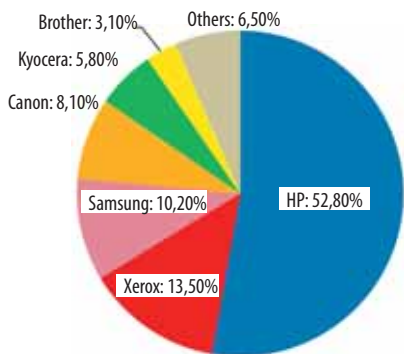


It is notable that the Electronic Tables register the procurements of the supplies disregarding the “originality” and origin of the latter, because the volumes of purchasing are estimated only by the documentation for every closed deal. Specially developed search procedures allow executing the vast amount of research for State Sector in the segment of the Russian market of supplies for laser printing. For instance, they allow specialists to evaluate the shares of the world leading brands (HP, Xerox, Samsung, Canon, Kyocera, Brother, Oki, Panasonic) inside total volume of sales, to evaluate Russian leading suppliers in terms of volumes, to see the regional and sectorial buyers preferences, to detect “unchangeable” seller-buyer chains, to discover seasonal specifics of purchases, etc.

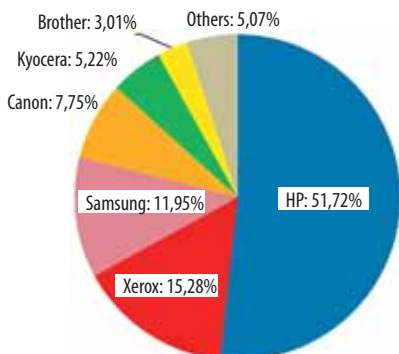
One of the tasks being solved by ET is the recent evaluation of the leading brands shares (HP, Xerox, Samsung, Canon, Kyocera, Brother, Oki, Panasonic) in the total volumes of supplying for the Russian state organizations. The analysis of the data for monochrome laser printing for 2012 shows that the ratio of the eight leading brands remains practically unchanged if compared to the results of 2011 (see the picture below): HP – 51.72% (in 2011 – 52.80%), Xerox – 15.28% (in 2011 – 13.50%), Samsung – 11.95% (in 2011 – 10.2%), Canon – 7.75% (in 2011 – 8.10%), Kyocera – 5.22% (in 2011 – 5.80%), Brother – 3.01% (in 2011 – 3.10%), Oki – 1.31% (in 2011 – 1.81%), Panasonic – 1.58% (in 2011 – 1.34%). So, the six leading brands share more than 95% of supplied cartridges for monochrome printing (in pcs.). The comparing with 2011 results showed the considerable growth in cartridge procurements for Xerox and Samsung.

\* A detailed description of the Electronic Tables about state procurements of printing devices and supplies is demonstrated at the web-address <http://www.sforp.ru/docs/products/catalog/list/index.htm>

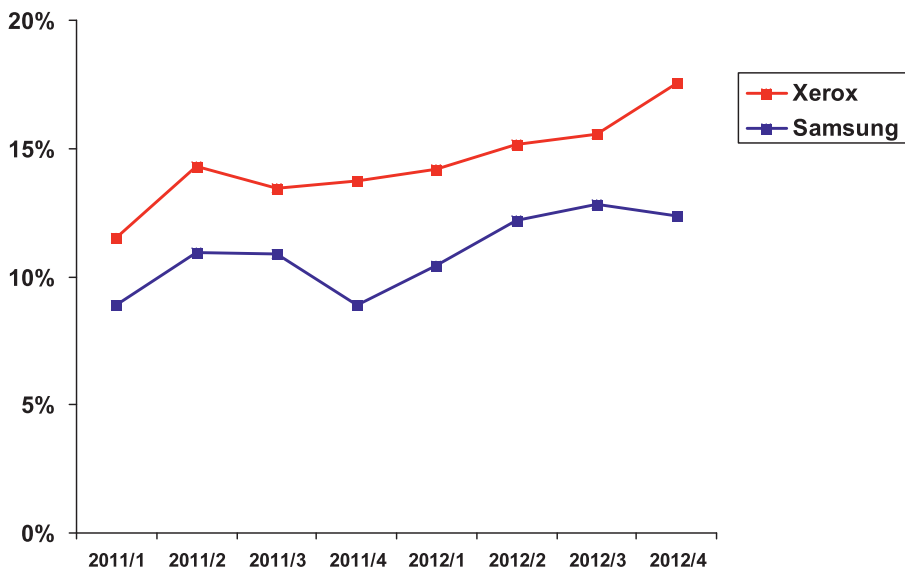
**Shares of Cartridges for Monochrome Laser Printing in 2011**



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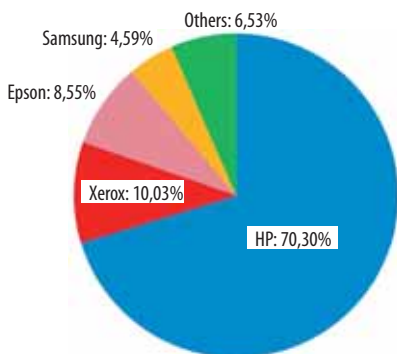


**Quarterly Shares of Xerox and Samsung Cartridges in 2011-2012**

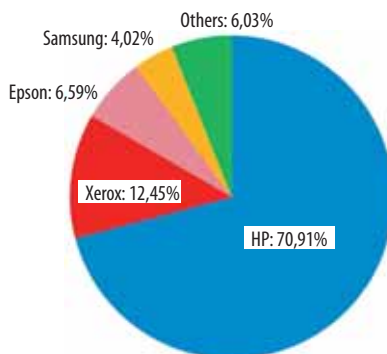


Data analysis for color laser printing for 2012 shows that the ratio of the four leading brands remains practically unchanged if compared to the results of 2011 (see the picture below): HP – 70.91% (in 2011 – 70.30%), Xerox – 12.45% (in 2011 – 10.03%), Samsung – 4.02% (in 2011 – 4.59%), Epson – 6.59% (in 2011 – 8.55%). So, the four leading brands share 94% of supplied cartridges for color printing (in pcs.). The comparing with 2011 results showed the considerable growth in cartridge procurements for Xerox and considerable decline for Epson.

### Shares of Cartridges for Color Laser Printing in 2011



### Shares of Cartridges for Color Laser Printing in 2012



Another task performed by ET is a recent evaluation of cartridge ratings for monochrome and color laser printing in Russian state structures based on purchase volumes data (in pcs.). During evaluation of monochrome laser cartridges popularity for the state structures two ratings were made. The first one in accordance with cartridge purchase shares in terms of pieces (consumption rating), the second one in accordance with the share of establishments, which bought the cartridges (rating of corporative popularity). The results are shown in the table below.

Nº	Cartridge	Consumption Rating	Rating of Corporative Popularity	Nº	Cartridge	Consumption Rating	Rating of Corporative Popularity
1	HP Q2612A	13.41% (1)	55.6% ( 1 )	15	Xerox 106R01159	1.56% (15)	19.4% (13)
2	HP CE505A/X	5.88% (2)	46.3% (2)	16	Xerox 106R01485/87	1.53% (16)	13.3% (20)
3	HP CB436A	5.23% (3)	35.0% (6)	17	Canon FX-10	1.45% (17)	20.3% (12)
4	HP Q7553A/X	4.71% (4)	41.3% ( 5 )	18	Brother TN-3170	1.24% (18)	7.0%
5	HP Q5949A/X	4.20% (5)	43.2% ( 4 )	19	Canon 703	1.21% (19)	12.2%
6	Xerox 106R01374	4.06% (6)	14.1% (18)	20	Canon E16/E30	1.21% (20)	28.7% (8)
7	HP CE285A	3.88% (7)	33.7% (7)	21	HP Q2613A/X	1.18%	25.6% (11)
8	Samsung MLT-D205	3.81% (8)	14.3% (17)	22	Xerox 108R00909	1.17%	13.7% (19)
9	HP C7115A/X	3.64% (9)	43.9% ( 3 )	23	Canon EP27	0.94%	19.3% (14)
10	Samsung ML-D3050B	2.42%(10)	6.4%	24	Canon EP22	0.78%	15.5% (16)
11	HP CB 435A	2.33% (11)	28.1% (9)	25	Panasonic KX-FAT88A	0.83%	13.0
12	HP CE278A	2.03% (12)	18.7% (15)	26	Samsung ML-2010D3	0.68%	12.8
13	HP C4092A	1.63% (13)	26.0% (10)	27	Xerox 106R01379	0.51%	12.5
14	Samsung ML-D2850B	1.56% (14)	8.1%	28	Xerox 006R01179	0.41%	11.4

As can be seen from the data shown in the table, 67.0% of the sales of the 20 most popular cartridges belong to monochrome cartridges (in pcs.). The leadership of HP is undisputable. From the 20 most popular (in terms of purchase volumes) cartridges 10 belong to HP brand, the evident leader of the Russian market for monochrome laser printing. The presence of Xerox (3), Canon (3), Samsung (3), Brother (1) cartridges in the rating is also quite natural, because these cartridges occupy places from 2 to 6 in terms of monochrome laser cartridges volumes purchased by the Russian state structures. From the 20 cartridges, leaders in corporate popularity, 11 are of HP brand, 4 are Canon, 1 – Samsung, 4 – Xerox. This rating lacks Kyocera cartridges, and that is not surprising since the high consumption rating (the 5th place of the brand in terms of sales to state structures) is for the most part determined by the big sales to the limited circle of corporate buyers (Russian Pension Fund Organization in the first place).

While comparing ratings it should be noted, that 16 from 24 cartridges fall into both ratings. Those are the most popular models (the list is shown below). It is interesting that only HP (10), Xerox (3), Canon (2), and Samsung (1) models fall into those 16. Cartridges that do appear in the first rating but not in the second one are not sold frequently, but they are sold in large quantities. These are: Samsung ML-D2850B/ D3050B, Canon 703, Brother TN-3170. On the opposite, cartridges that do appear in the second but not in the first are sold often but in the small quantities. These are: Canon EP22, Canon EP27, Xerox 108R00909.

### 16 Most Popular Cartridges for Monochrome Laser Printing in the Russian State Structures:

- |               |               |                 |                      |
|---------------|---------------|-----------------|----------------------|
| • HP Q2612A   | • HP C4092A   | • HP CB435A     | • Samsung ML-D205    |
| • HP CE505A/X | • HP C7115A/X | • HP CE278A     | • Xerox 106R01159    |
| • HP CB436A   | • HP Q5949A/X | • Canon E16/E30 | • Xerox 106R01374    |
| • HP CE285A   | • HP Q7553A/X | • Canon FX-10   | • Xerox 106R01485/87 |

Something also must be said about the models, which made a serious “jump” in the rating compared with 2011 results. The most impressive growth (in terms of purchase volumes) in 2012 was shown by: HP CE285A, HP CE278A, Samsung MLT-D205, Xerox 106R01374.

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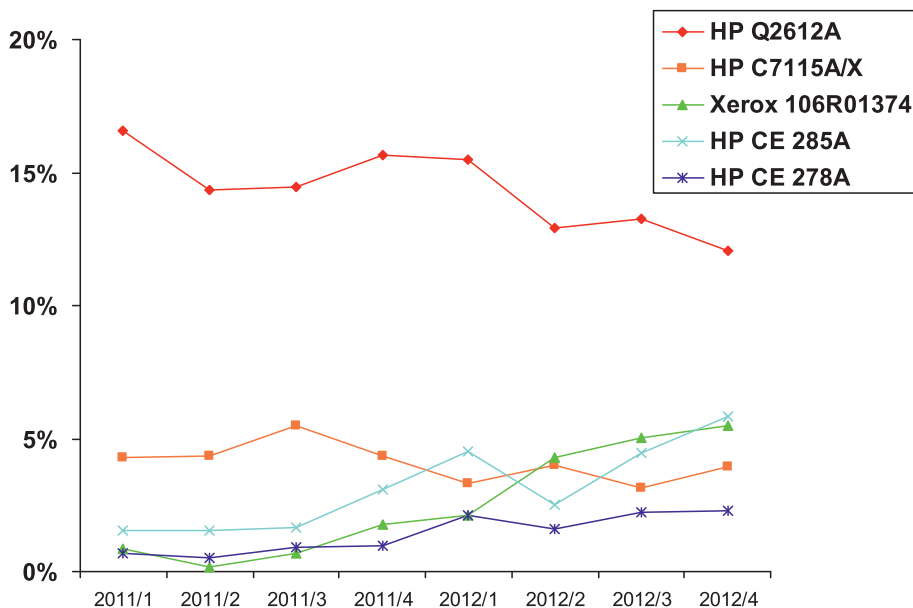


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### Quarterly Shares of Popular Cartridge Models in 2011-2012



The structural analysis of printing supplies purchases for laser printing in the Russian state organizations showed that the share of color laser cartridges constitutes only 5.6% from the whole volume (in pcs.). The most popular color laser cartridges (in accordance with purchase share in terms of pieces) are:

- HP CB540/541/542/543
- HP Q6000/6001/6002/6003
- HP CC530/531/532/533
- HP Q5950/5951/5952/5953
- HP CE320/321/322
- HP Q6470/6471/6472/6473
- Epson S050226/227/228/229
- Epson S050187/188/189/190
- Xerox 106R01335/1336/1337/1338
- Xerox 106R01481/1482/1483/1484
- Xerox 106R01203/1204/1205/1206
- Samsung CLT-K/C/M/Y409

More detailed results of marketing research for the Russian market of laser printing supplies will be shown at the international office equipment and supplies exhibition BUSINESS-INFORM 2013 (21-23 of May 2013, Moscow, All-Russia Exhibition Center, pavilion #20).