

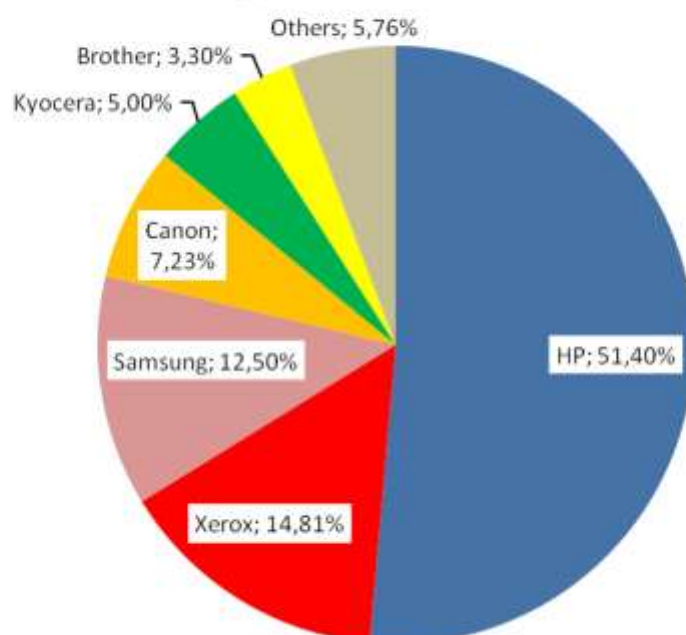
Russian State Structures Laser-Cartridges Rating for the First Half of 2012

Informational agency Business-Inform has prepared **Electronic charts (EC)** developed to collect data about state procurements of printing devices and supplies. In the section of EC attributed to supplies for every closed deal there are seller and buyer, their contacts, the date of deal summation, amount of purchase, it's 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 information about state purchases for the first half of 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 state structures.

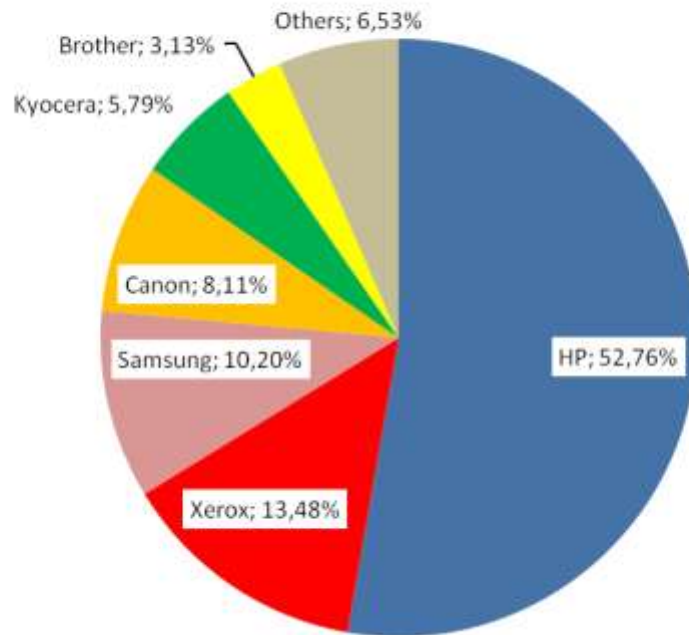
It is notable that the **Electronic charts** register the supplies disregarding their “originality” and origin, because the volumes of purchasing are estimated only by the documentation for every closed deal. Specially developed search procedures allow executing the vast amount of research for State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

One of the tasks solved by EC is the recent evaluation of leading brands shares (HP, Xerox, Samsung, Canon, Kyocera, Brother, Oki, Panasonic) in the total volumes of supplying for Russian state structures. The analysis of the data for monochrome laser printing for the first half of 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 – 51,4% (in 2011 - 52.76%), Xerox – 14.81% (in 2011 - 13.48%), Samsung – 12.5% (in 2011 - 10.2%), Canon – 7.23% (in 2011 - 8.11%), Kyocera – 5.0% (in 2011 - 5.79%), Brother – 3.30% (in 2011 - 3.13%), Oki – 1.61% (in 2011 – 1.81%), Panasonic– 1.75% (in 2011 – 1.34%). So, the six leading brands share more than 94% of supplied cartridges for monochrome printing (in pcs.).

Shares of Cartridges for Monochrome Laser Printing in the First Half 2012

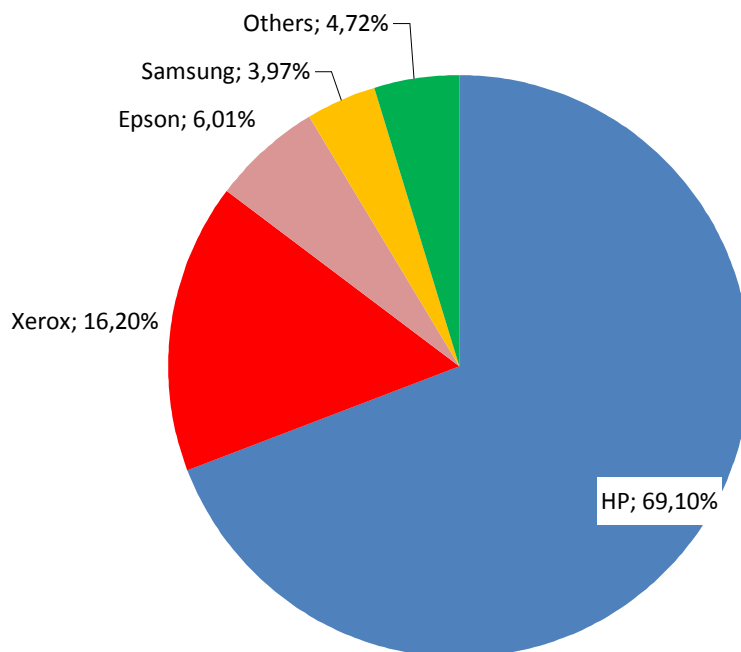


Shares of Cartridges for Monochrome Laser Printing in 2011

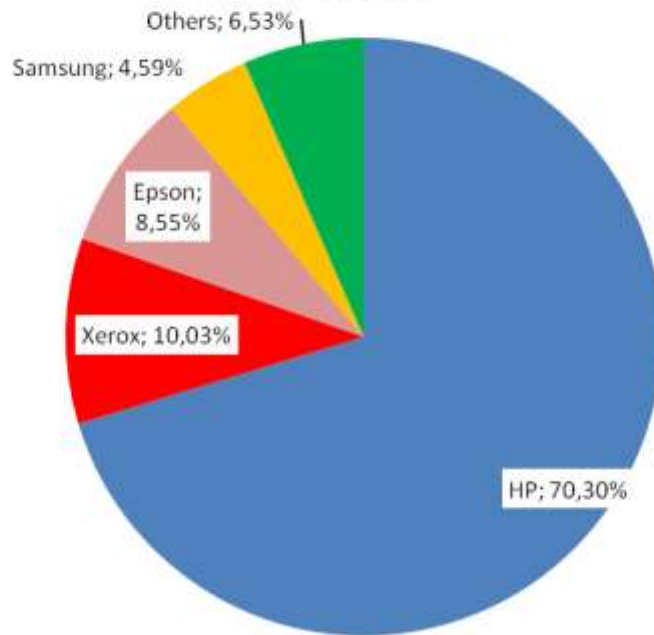


Data analysis for color laser printing for the first half of 2012 that the ratio of the four leading brands remains practically unchanged if compared to the results of 2011 (see the picture below):: HP – 69.1% (in 2011 - 70.33%), Xerox – 16.2% (in 2011 - 10.03%), Samsung – 3.97% (in 2011 - 4.59%), Epson – 6.01% (in 2011 - 8.55%). So, the three leading brands share more than 93% of supplied cartridges for color printing (in pcs.).

Shares of Cartridges for Color Laser Printing in the First Half of 2012



Shares of Cartridges for Color Laser Printing in 2011



It should be noted, however, that during the first half of 2012 the HP cartridge share remained mostly unchanged in comparison with 2011 results, and the Xerox share rose significantly (up to 13.5%, while in 2011 it was 10.03%).

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 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 those which bought the cartridges (rating of corporative popularity). The results are shown in the table below.

№	Cartridge	Consumption Rating	Rating of Corporative Popularity	№	Cartridge	Consumption Rating	Rating of Corporative Popularity
1	HP Q2612A	13.82% (1)	54.5% (1)	14	HP CE278A	1.70% (14)	16.9%
2	HP CB436A	6.09% (2)	37.5% (2)	15	Xerox 106R01159	1.64% (15)	18.4% (12)
3	HP CE505A/X	4.95% (3)	29.6% (4)	16	Brother TN-3170	1.48% (16)	7.7%
4	HP Q7553A/X	4.75% (4)	26.0% (9)	17	Canon E16/E30	1.38% (17)	15.9% (14)
5	HP Q5949A/X	3.99% (5)	28.9% (7)	18	HP Q2613A	1.30% (18)	18.6% (11)
6	Samsung MLT-D205	3.94% (6)	12.4%	19	Canon 703	1.23% (19)	12.5%
7	HP C7115A/X	3.73% (7)	29.5% (5)	20	Xerox 106R01485/87	1.09% (20)	7.4%
8	Xerox 106R01374	3.51% (8)	11.9%		Canon FX-10	0.99%	20.4% (10)

№	Cartridge	Consumption Rating	Rating of Corporative Popularity	№	Cartridge	Consumption Rating	Rating of Corporative Popularity
9	HP CE285A	3.45% (9)	33.7% (3)		Canon EP27	0.91%	18.4% (13)
10	HP CB435A	2.49%(10)	29.0% (6)		Canon EP22	0.69%	15.0% (16)
11	Samsung ML-D3050A	2.47% (11)	6.6%		Panasonic KX-FAT88A	0.85%	14.5% (17)
12	HP C4092A	1.90% (12)	27.0% (8)		Samsung ML-2010D3	0.78%	13.6% (18)
13	Samsung ML-D2850A	1.75% (13)	8.9%	-	Xerox 106R00909	0.84%	13.0% (20)

As can be seen from the data shown in the table, 66.4% of the sales of the 20 most popular cartridges are of monochrome cartridges (in pcs.). The leadership of HP is undisputable. From 20 the most popular (in terms of purchase volumes) cartridges 11 belong to HP brand, the evident leader of Russian market for monochrome laser printing. The presence of Xerox (3) , Canon (2), Samsung (3), Brother (1) cartridges in the rating is also quite natural, because these cartridges occupies places from 2 to 6 in terms of volumes of monochrome laser cartridges purchasing by Russian state structures. From 20 cartridges, leaders in corporate popularity, 10 are of HP brand, 4 are Canon, 2 Samsung, 4 Xerox, 1 is Panasonic. 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 corporative buyers (Russian Pension Fund Organization in the first place).

While comparing ratings it should be noted, that 12 from 26 cartridges fall into both ratings. Those are the most popular models (the list is shown below). It is interesting that only HP (10), Canon (1) и Xerox (1) models fall into those 12. Cartridges that do appear in the first rating but not in the second one are not sold frequently but in large quantities. Those are: Samsung ML-D2850B, Samsung ML-D3050B, Samsung MLT-D205, Canon 703, Brother TN-3170, Xerox 106R01159, Xerox 106R01485/87, HP CE278A. On the opposite, cartridges that do appear in the second but not in the first are sold often but in the small quantities. Those are: Canon EP22, Canon EP27, Canon FX-10, Samsung ML-2010, Brother TN-2075, Panasonic KX-FAT88A.

Something also must be said about models, which made a serious “jump” in the rating compared with 2011 results. The most impressive growth (in terms of purchase volumes) in the first half of 2012 was shown by: HP CE285A , Samsung MLT-D205 , Xerox 106R01374, HP CE278A, Brother TN-3170

12 Most Popular Cartridges for Monochrome Laser Printing in Russian State Structures:

- HP Q2612A • HP C7115A/X • Canon E16/E30 • Xerox106R01374
- HP CE505A/X • HP Q5949A/X • Canon FX-10 • Xerox 106R01159
- HP CB436A • HP Q7553A/X • HP C4092A
- HP CE285A • HP CB435A

The structural analysis of printing supplies purchases for laser printing in 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 • Epson S050226/227/228/229
- HP Q6000/6001/6002/6003 • Epson S050187/188/189/190

- HP CC530/531/532/533
- HP Q5950/5951/5952/5953
- HP CE320/321/322
- HP Q6470/6471/6472/6473
- Xerox 106R01335/1336/1337/1338
- Xerox 106R01481/1482/1483/1484
- Xerox 106R01203/1204/1205/1206
- Samsung CLT-K/C/M/Y-409

More detailed results of marketing research for Russian market of printing supplies for laser printing are shown in the table.