



## **Printing Consumables Market in Central and Eastern Europe, the Middle East, and Africa Volume Declined in 2018 but Value Remained Flat, According to IDC**

**FOR IMMEDIATE RELEASE, Prague** — The printing consumables market in Central Europe, the Middle East, and Africa (CEMA) declined year-on-year in units by 3.2% and remained almost flat in terms of value (0.1% growth) in 2018, according to the *EMEA Bi-Annual Consumables Tracker* published by International Data Corporation (IDC).

Both ink and toner product segments fell in value year on year, particularly ink, which declined by 1.4% while toners recorded very slight growth of 0.5%.

The share of original (OEM) products increased slightly, while both aftermarket segments — compatibles and refilling services — recorded share declines, with refilling services contracting most.

### **Ink Supplies**

Although ink supplies still constitute the majority of CEMA consumable market volume, their share is slowly declining. The development of ink tanks products, using high- or very-high-yield ink containers, along with the overall greater efficiency of ink technology, lead to reduced ink supply shipments.

The above trend, together with growing use of business inkjet devices, drove the increase in OEM market shares. In 2018, original products captured more than 56% unit share and 82% value share on the overall ink supplies market.

### **Toner Supplies**

Conversely, the toner market is affected by the negative development of the laser installed base and the negative impact of digital transformation. It is further very dependent on the current economic situation in given countries, exchange rate fluctuations, and public tender activity. For this reason, the market may vary greatly from country to country in the CEMA region. At the same time, some major trends are shaping the greater printing market, including the size and structure of consumables shipments. These trends include the transition to higher-speed devices, the growing adoption of color printing, and a rapidly developing demand for print services. While these factors support an increase of original toner sales, it is worth remembering that the overall CEMA market is still quite price sensitive, compared to Western Europe and other markets.

In 2018, original toners in CEMA accounted for close to 48% of the overall toner market in terms of units and almost 78% in terms of value.

### **Aftermarket**

The aftermarket in CEMA is clearly dominated by new-build cartridges and toners (clones). In some country markets, like Russia or the Commonwealth of Independent States (CIS), refilling services are also very popular. The prevalence of clones is leading to price erosion in both aftermarket sub-segments. At the same time, the overall share of non-original products remains very high compared to Western Europe (with the exception of some Middle East and African markets). This is due to the fact that mono lasers make up the bulk of the laser peripherals installed base, and the share of entry-level devices in both inkjet and laser segments is very high.

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