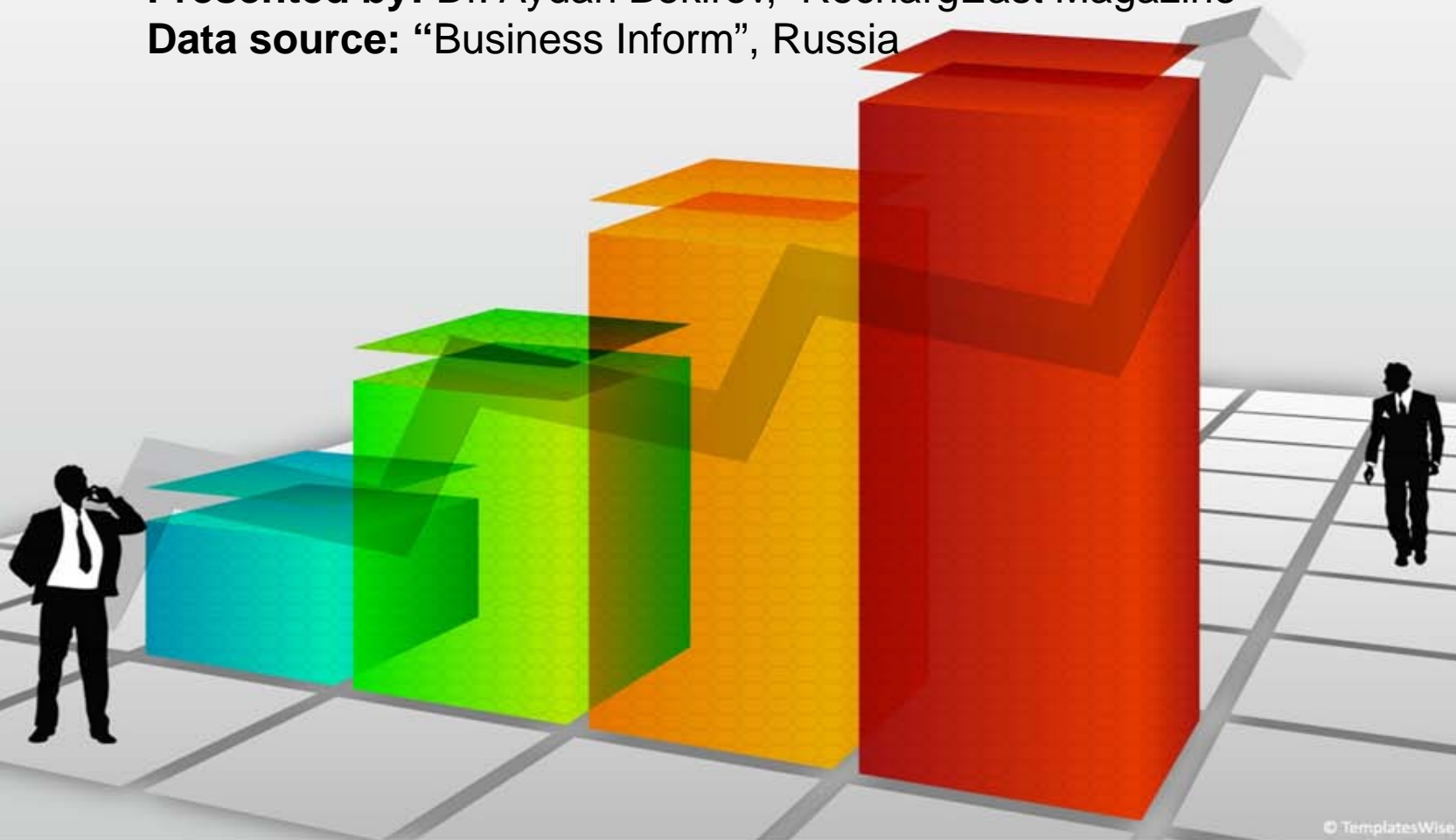
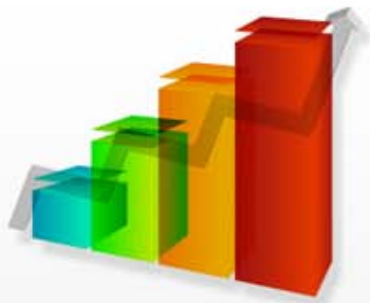


Current Status of the Russian Aftermarket Industry

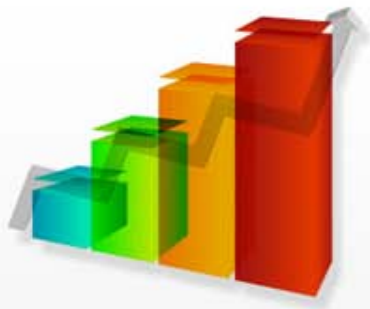
Presented by: Dr. Aydan Bekirov, RechargEast Magazine
Data source: "Business Inform", Russia





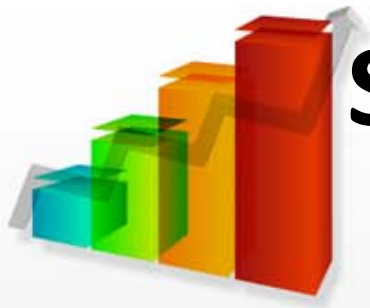
Content

- Segments of the Russian laser printing industry
- Industry leaders
- Sales and growth of laser printers and MFU 2000-2008
 - Total sales
 - Sales by sectors
 - History and trends among industry leaders
- Russian laser printers consumable market status
 - OEM consumables
 - Compatibles
 - Remanufactured consumables
 - Gray market status
- “Business Inform” background and products
- RechargEast and RechargRussia Magazines



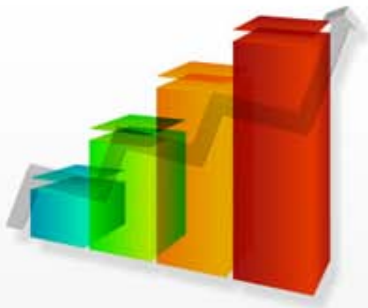
Segments of the Russian laser printing industry

- Data collection background
 - 16, 000 Russian companies
 - 35 regions
 - Financial data is based on the final product price, including VAT
 - Market research data include laser printers and MFU sold in Russia



Segments of the Russian laser printing industry

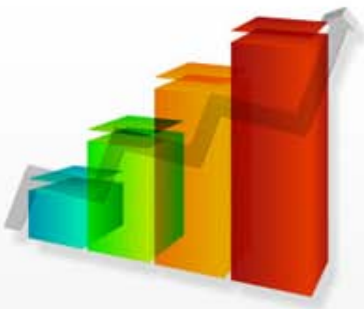
- **Segment 1** – B/W laser printers up to 20 pages/min; A4
- **Segment 2** – B/W laser printers 21-44 pages/min; A4
- **Segment 3** – B/W laser printers over 45 pages/min; A4
- **Segment 4** – Color laser printers < 45 pages/min; A4



Industry leaders

- **HP** – 52-46% for 2003-2008
- **Samsung** – 16-20% for 2003-2008
- **Xerox** – 13-16% for 2003-2008

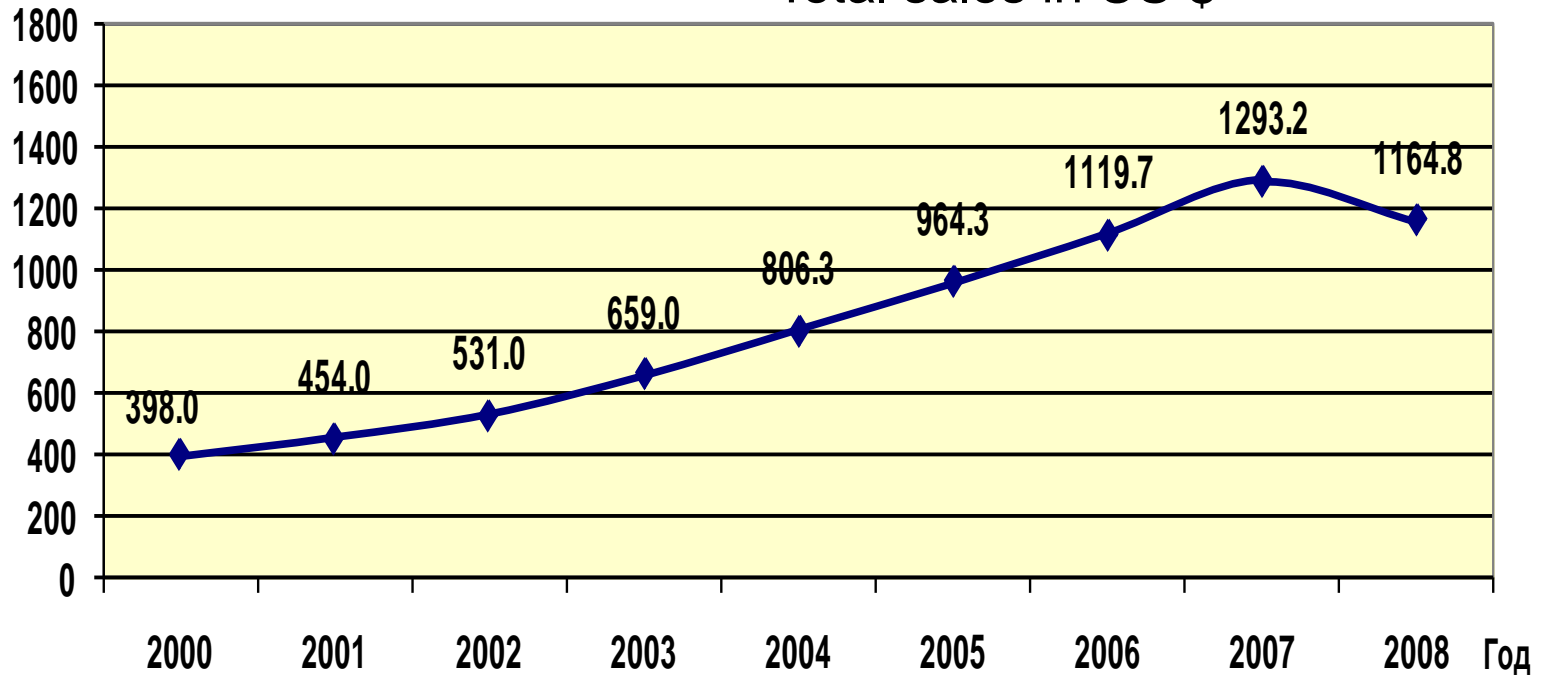
- **TOTAL market share: 80-82% for 2003-2008**

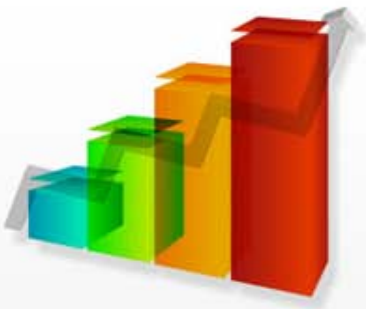


Sales and growth of laser printers and MFU 2000-2008

Sales volume, Millions of \$

Total sales in US \$



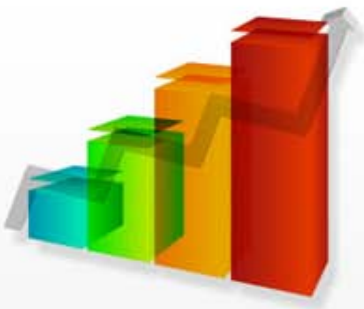


Sales and growth of laser printers and MFU 2000-2008

- Growth for 2000-2007 was 16-20% and 2008 was – 9.9%

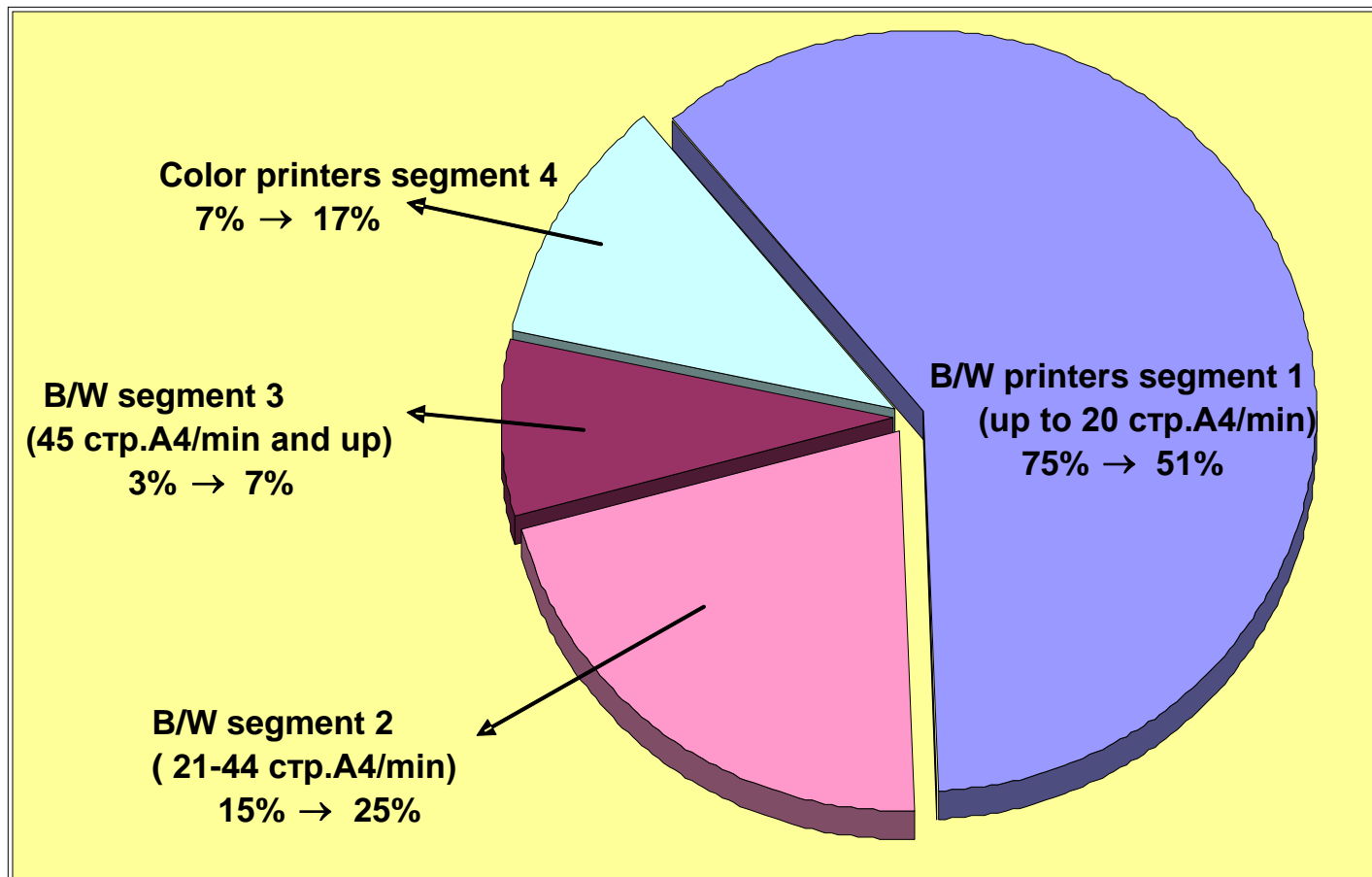
Expectations for 2009: \$700-\$760 Millions, or -35% - 40%

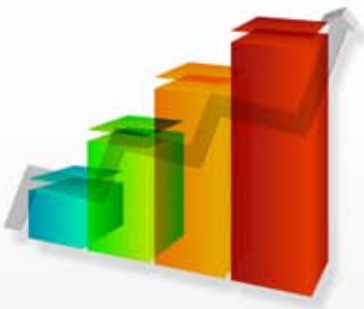
- Sales of segment 1 is going down, while the sales of segment 2 is growing
- Sales of color laser printers is growing, while the sales of the segment 1 printers went down from 75% (2000) to 52% (2008)



Sales and growth of laser printers and MFU 2000-2008

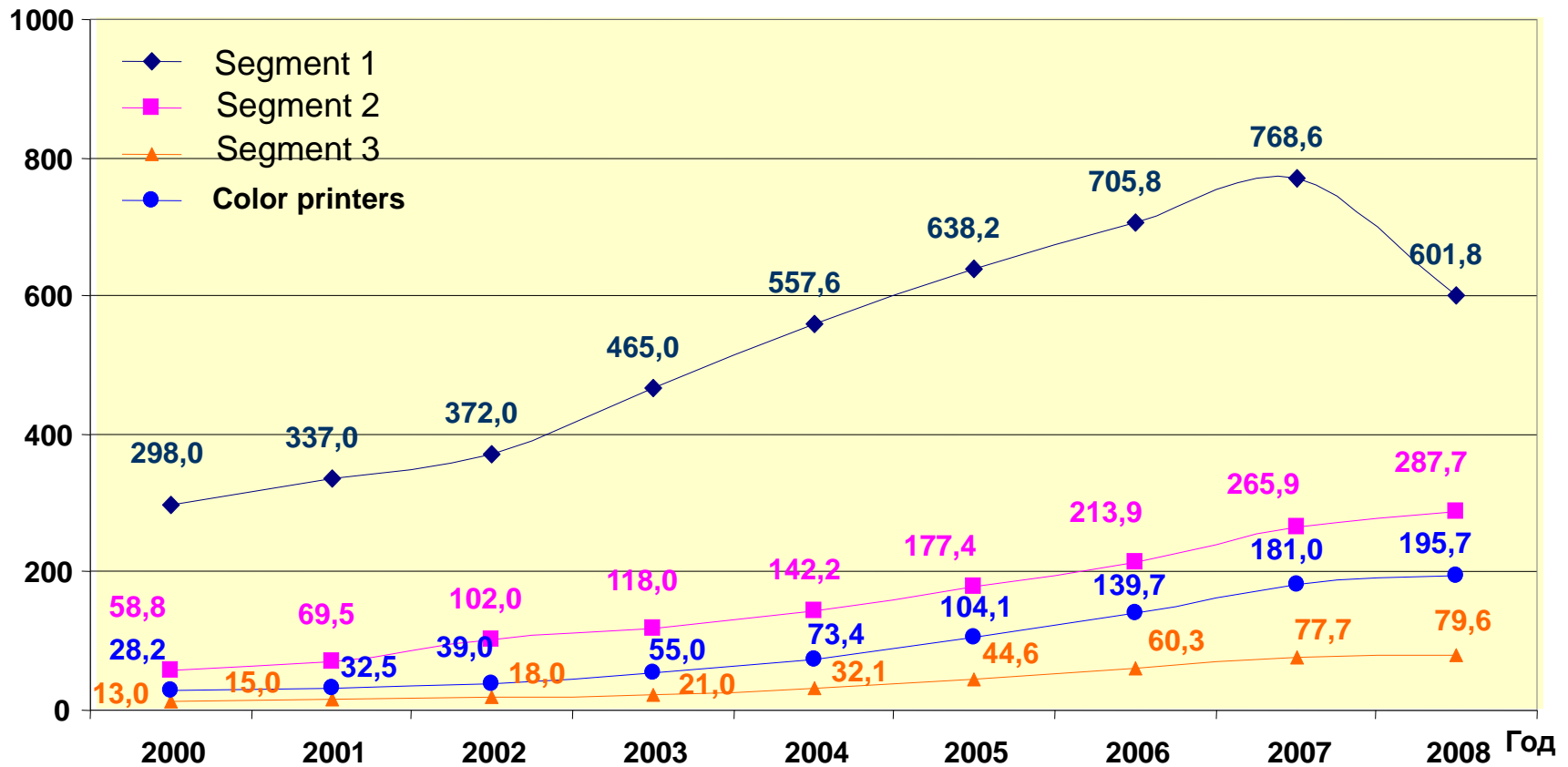
Total sales by segments in %

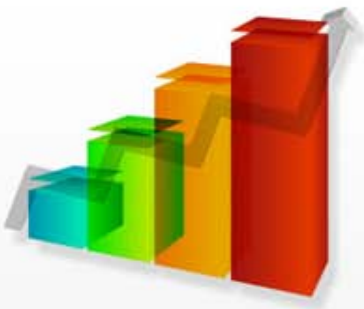




Sales and growth of laser printers and MFU 2000-2008

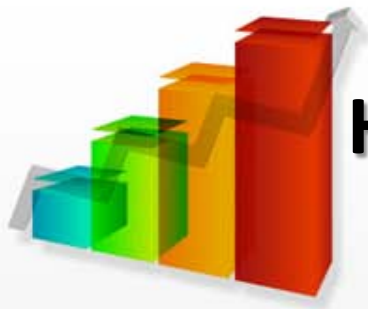
Sales volume, Millions \$





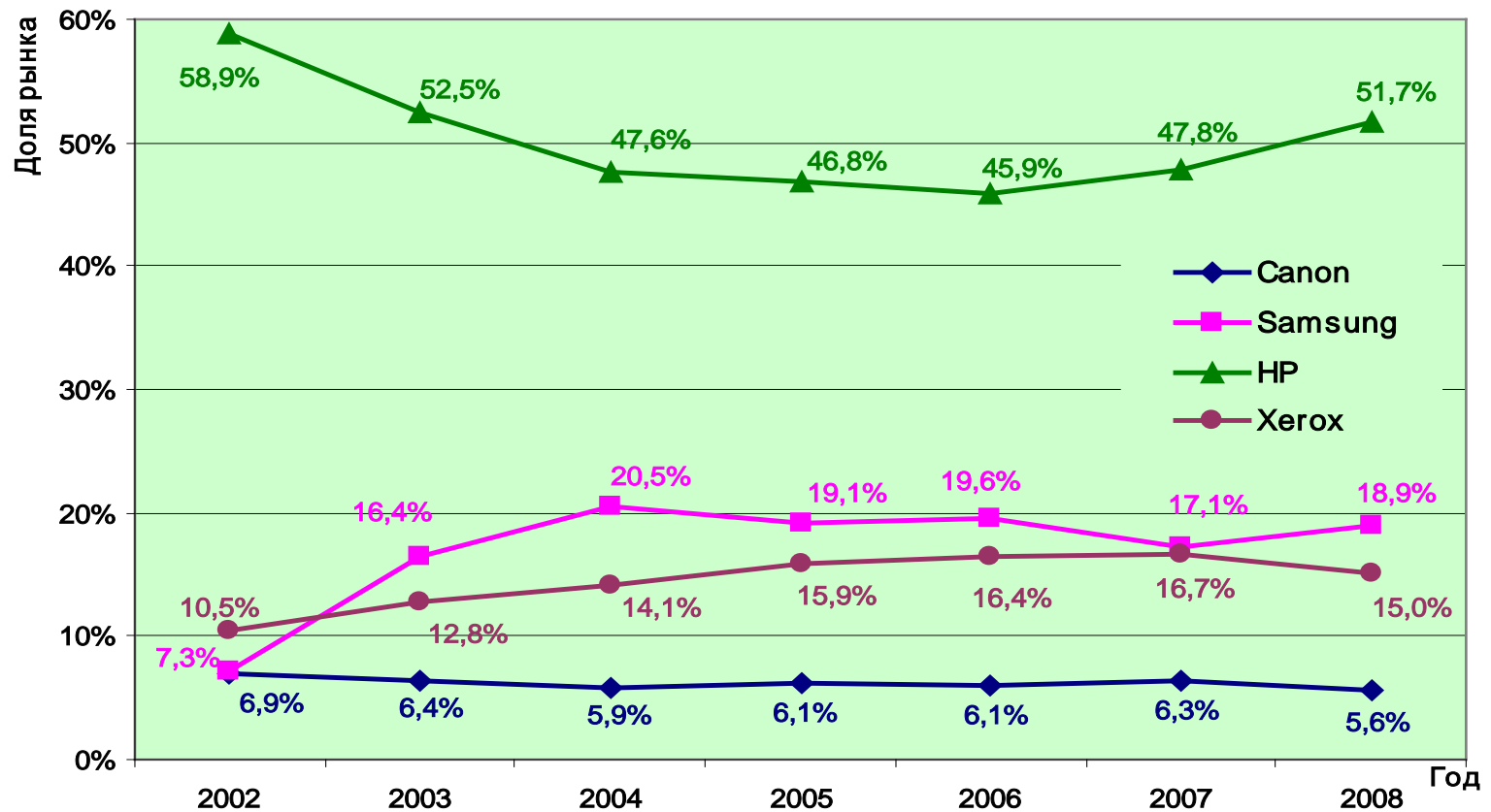
Sales and growth of laser printers and MFU 2000-2008

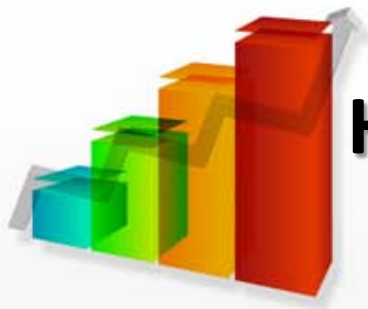
- Main reasons for the sales volume drop in 2008 for “Sector 1” are:
 - Prices in segment 2 are now close to segment 1
 - Reduction in the sold printer types; in 2008 Russia had 53 models in segment 2 and only 14 new models in segment 1
 - Some printer manufacturers are no longer offering printers from segment 1 (Ricoh, Kyocera)
- Main suppliers of Segment 1 printers:
 - Hewlett Packard, Xerox, Samsung, Canon, Kyocera, Ricoh (вкл NRG), Lexmark, Epson, Oki, Konica Minolta, Brother,



History and trends among industry leaders

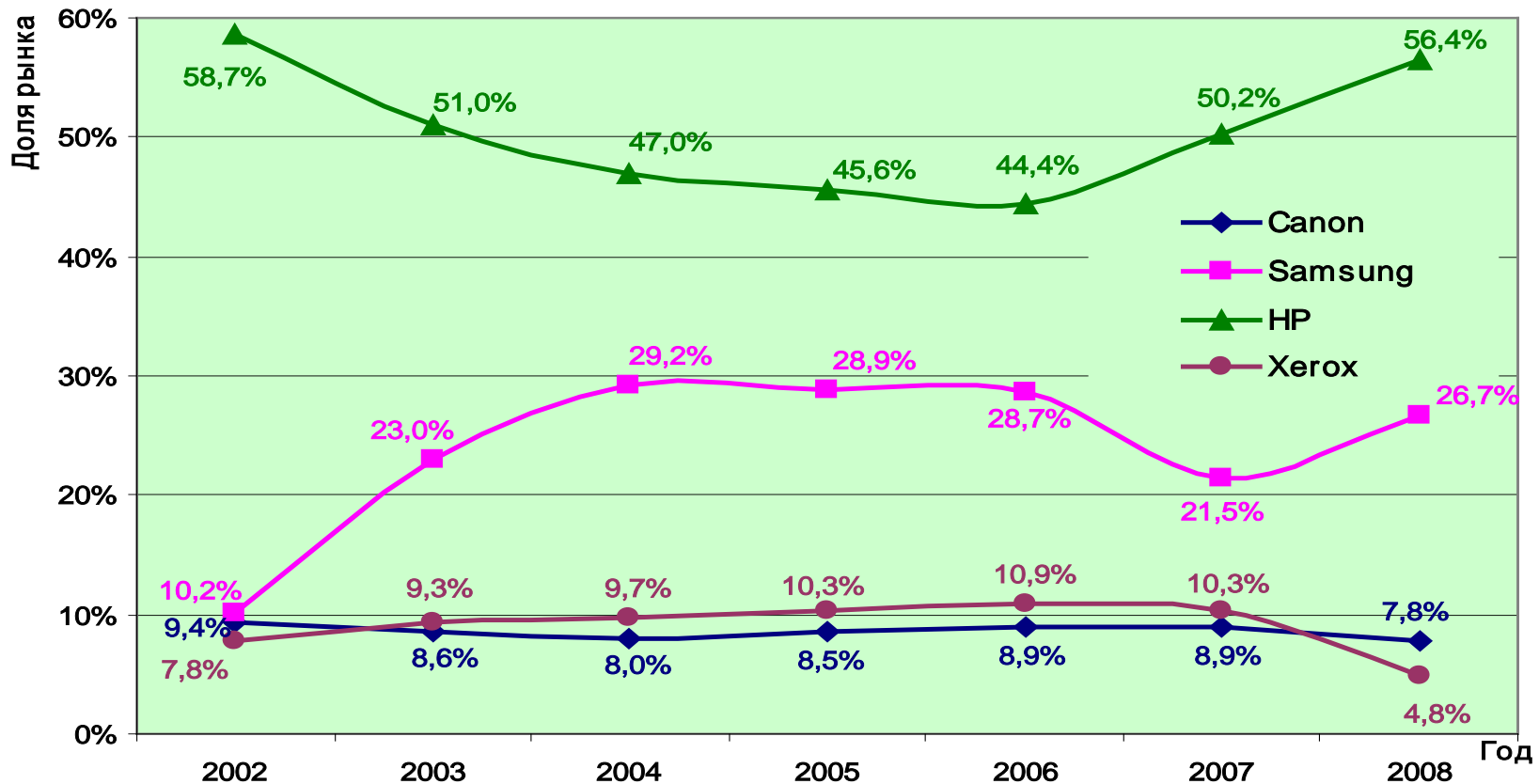
- General printer market shares in %

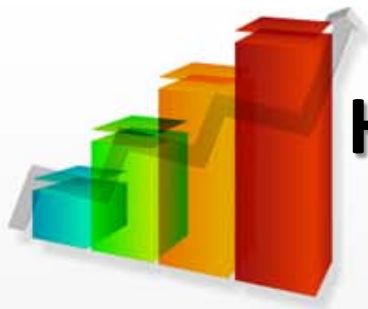




History and trends among industry leaders

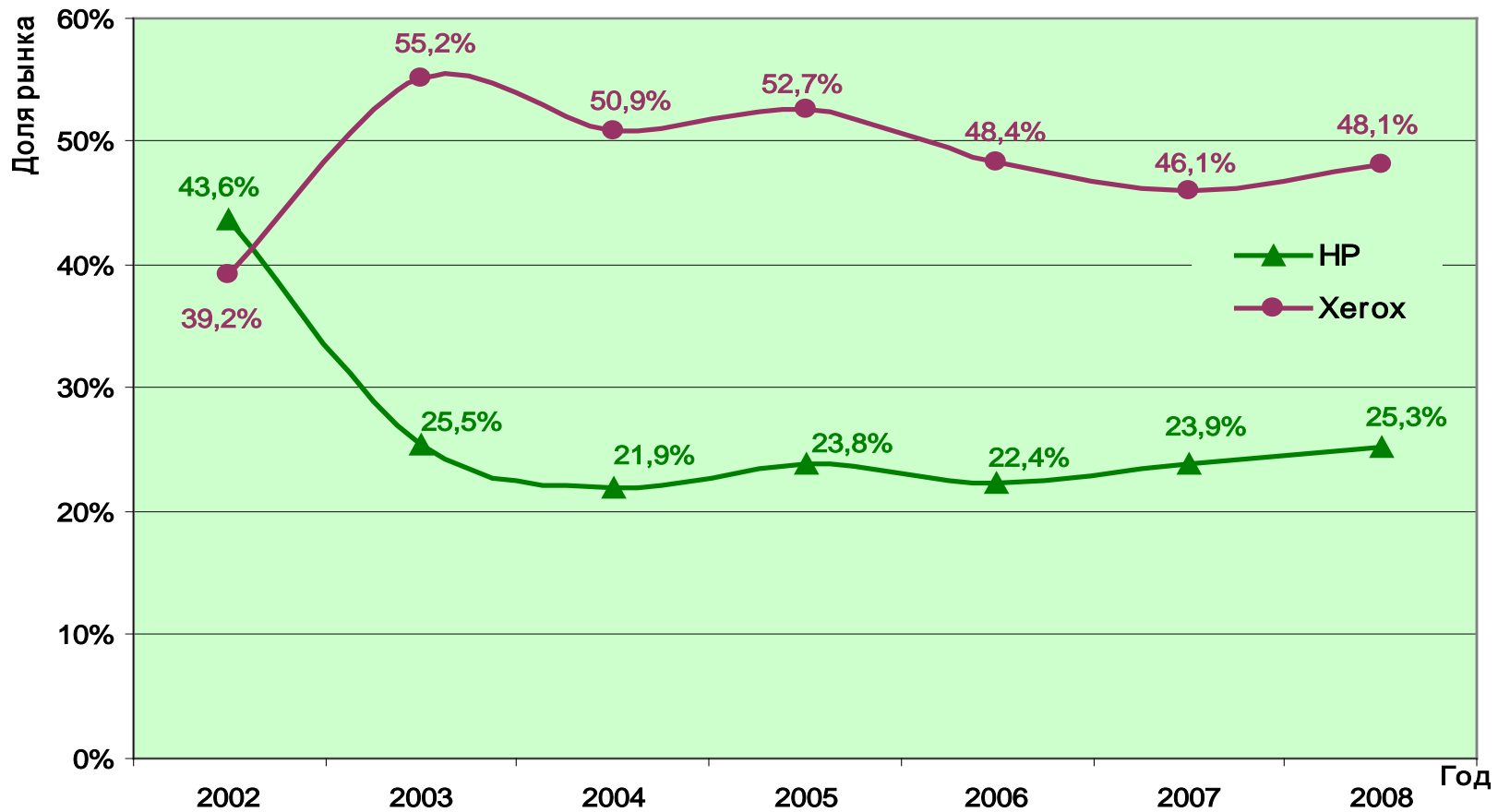
- Segment 1 in %

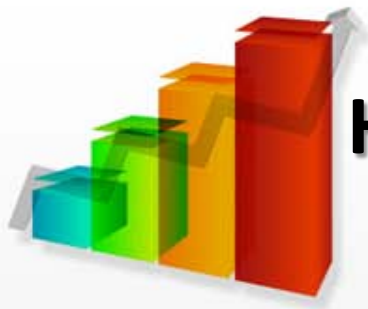




History and trends among industry leaders

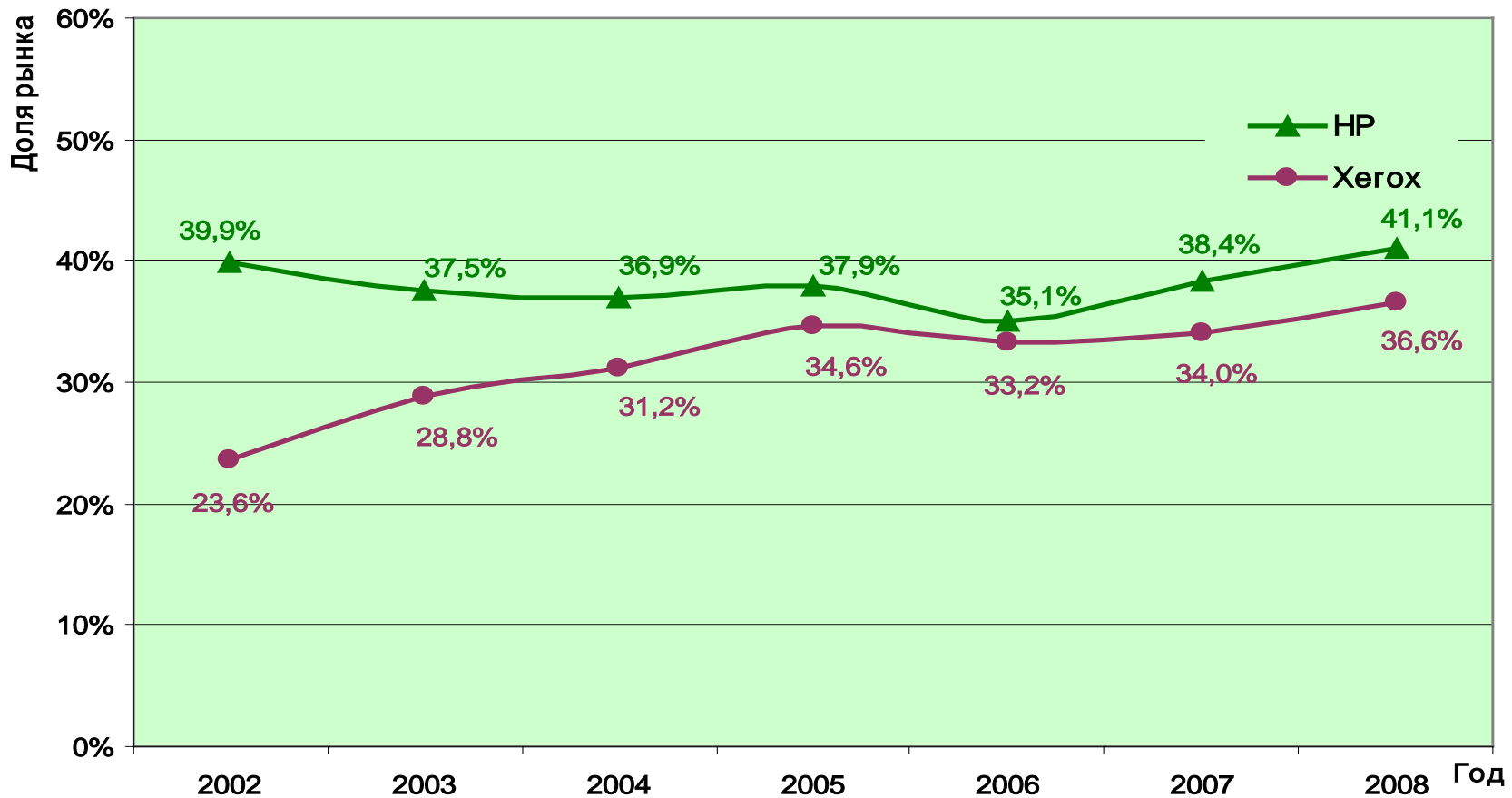
- Segment 3 in %

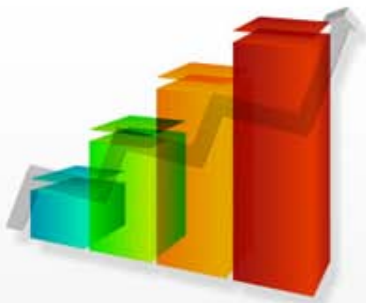




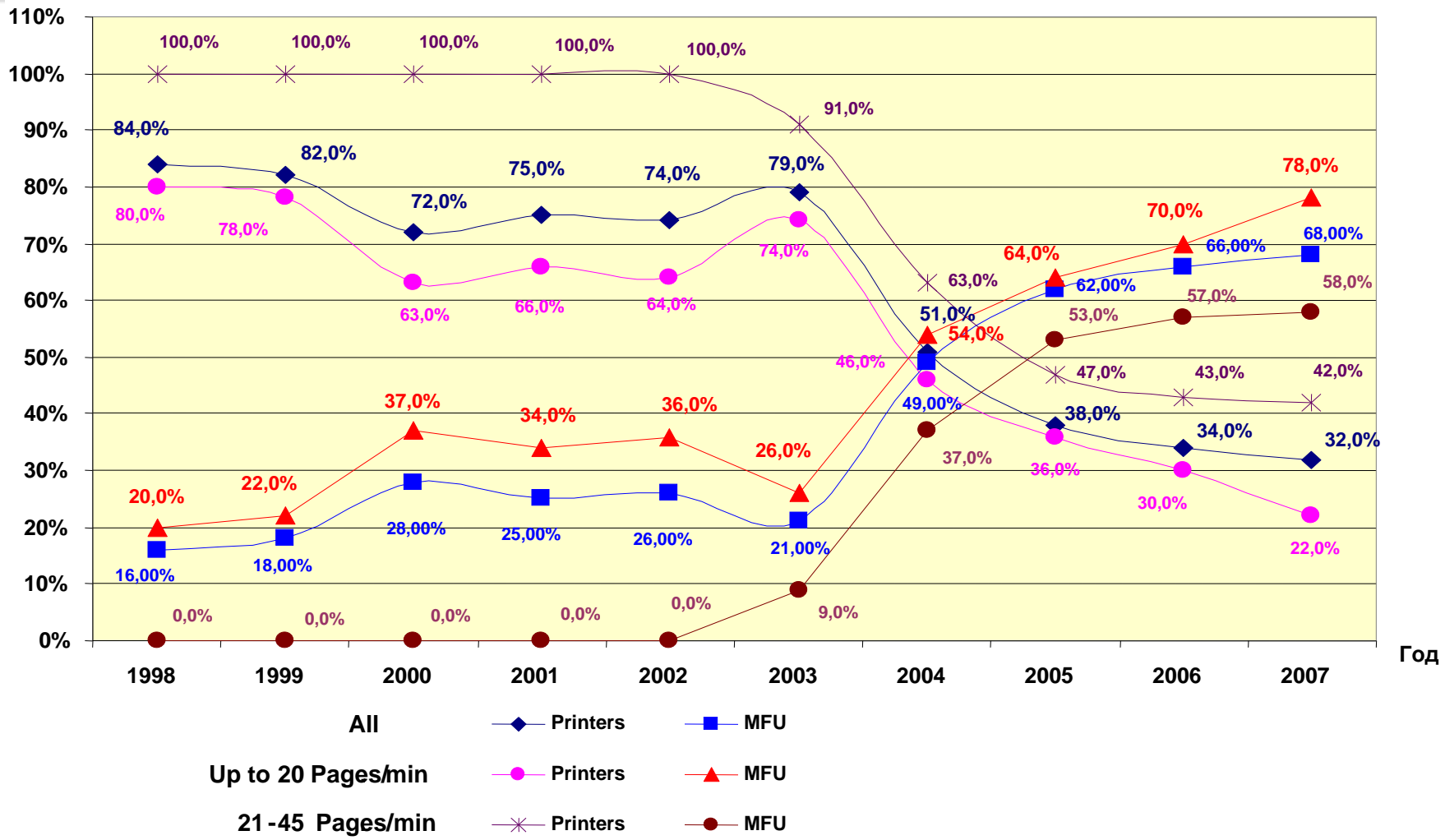
History and trends among industry leaders

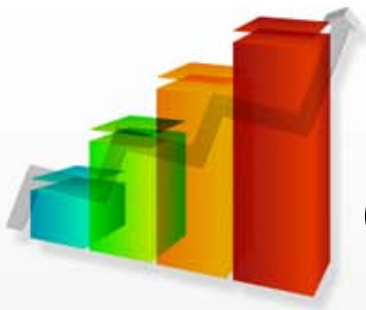
- Color printers; Segment 4 in %





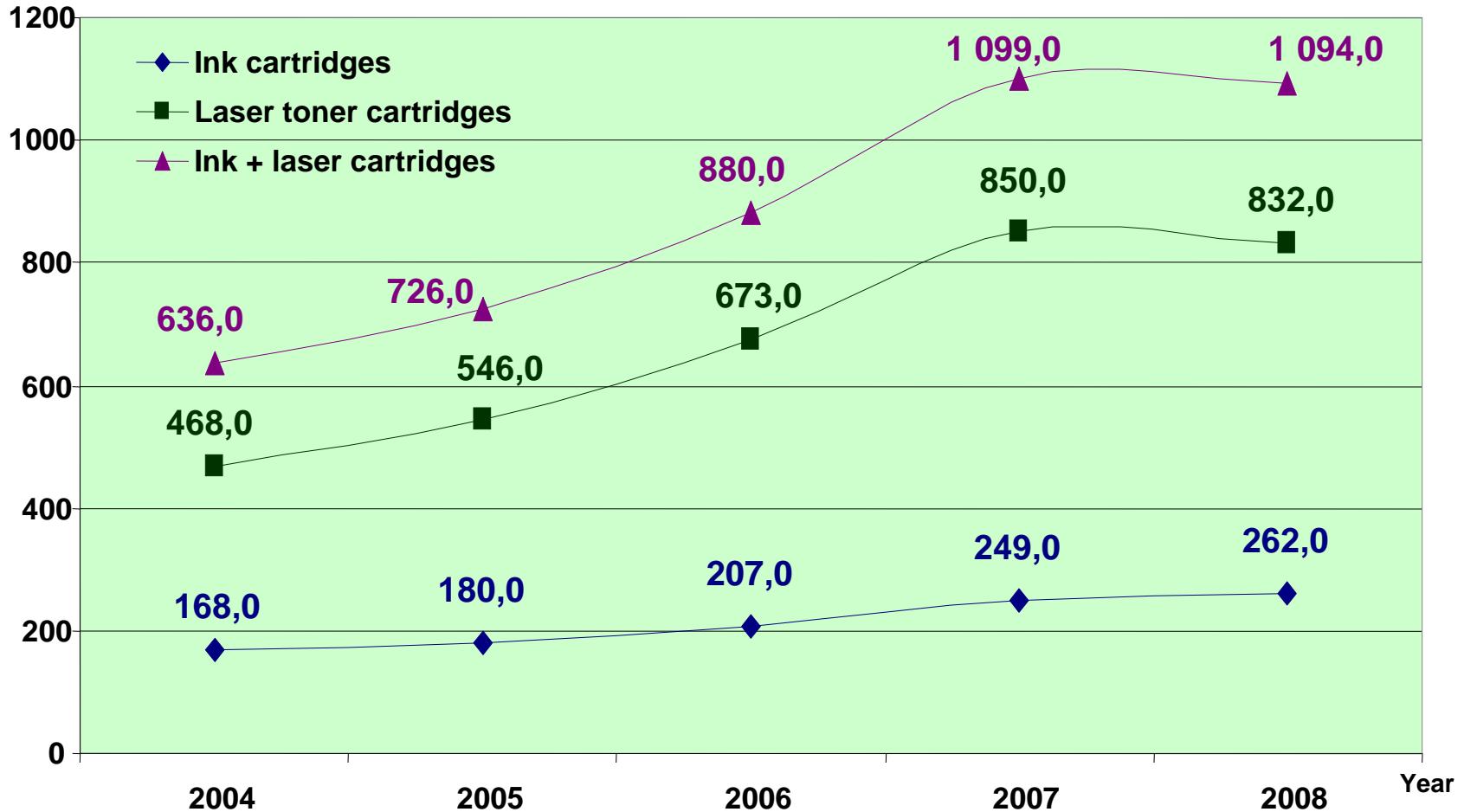
Shares of laser printers and MFU in %

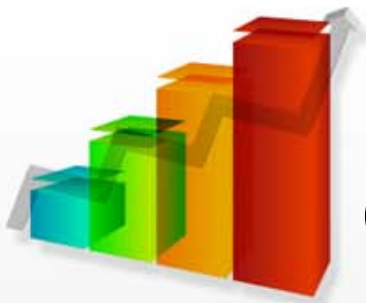




Russian laser printers consumable market status; OEM

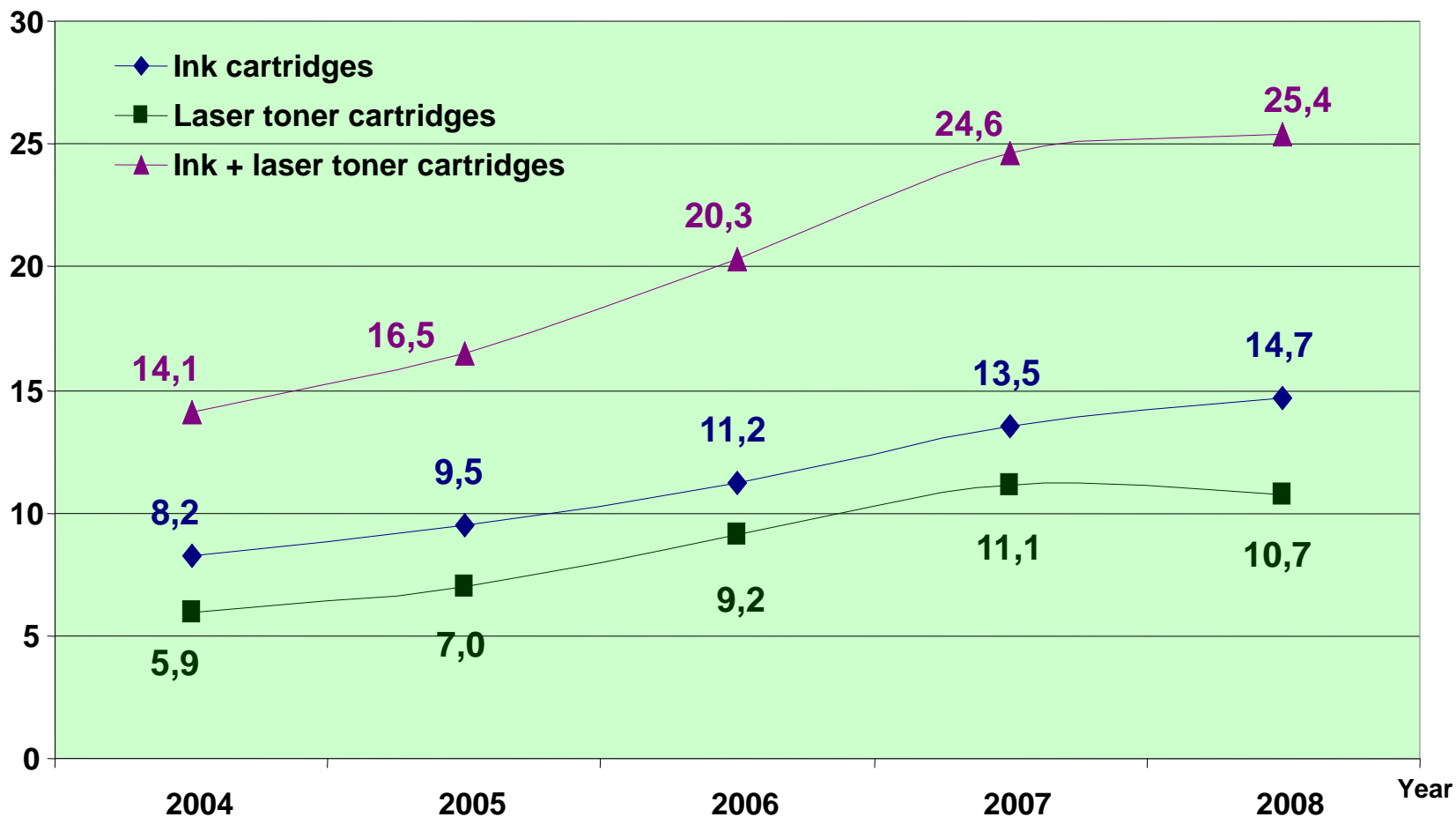
\$ millions

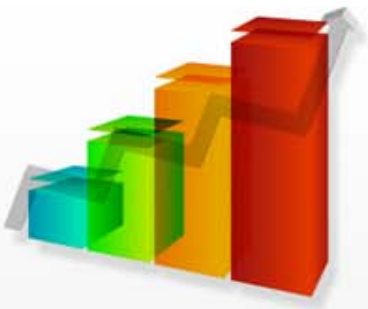




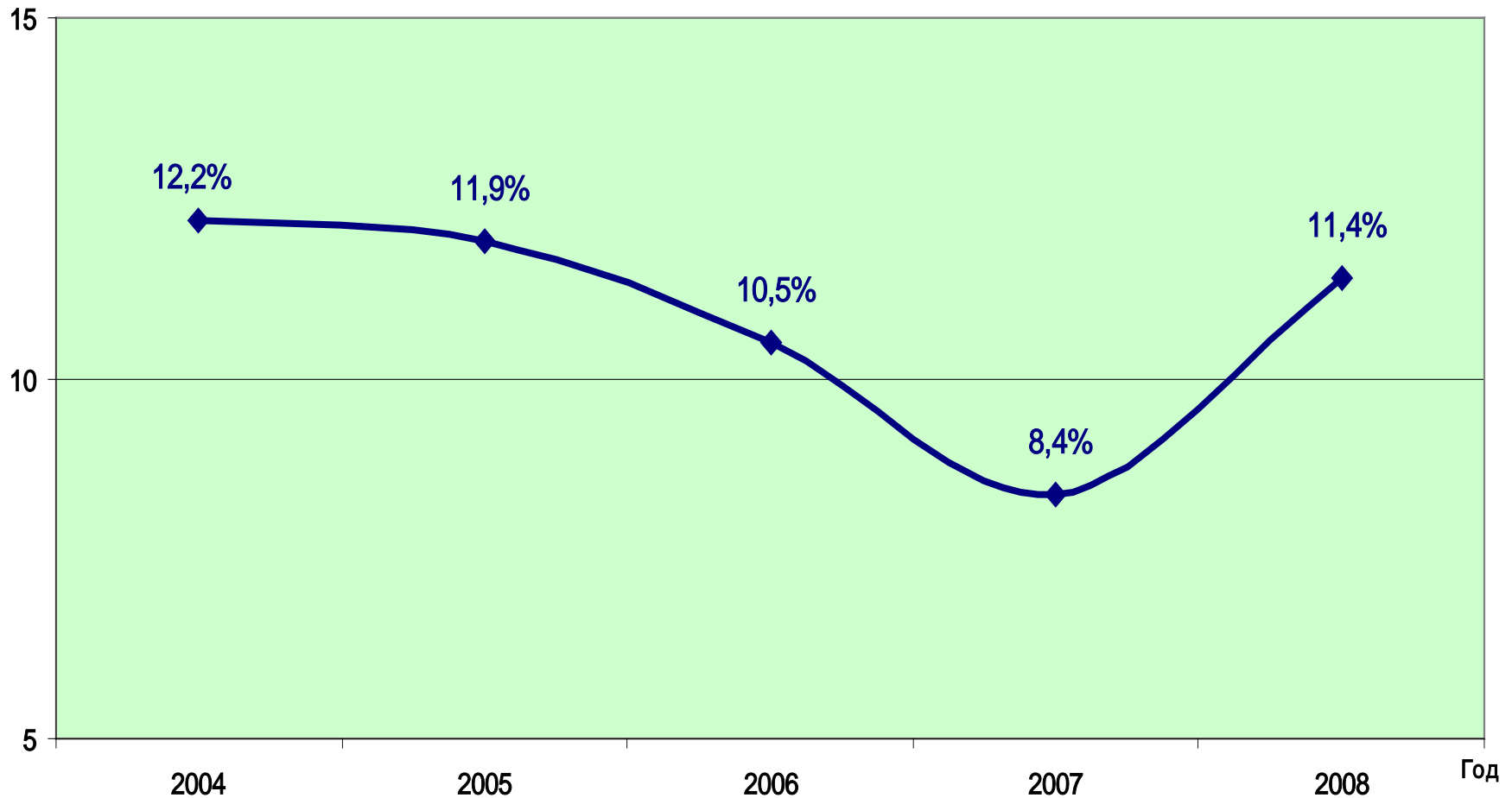
Russian laser printers consumable market status; OEM

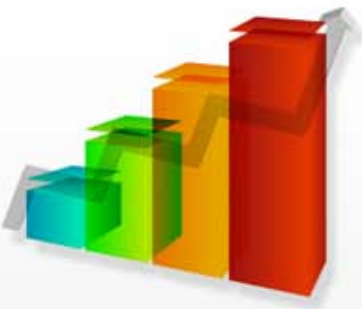
Sold cartridges, millions





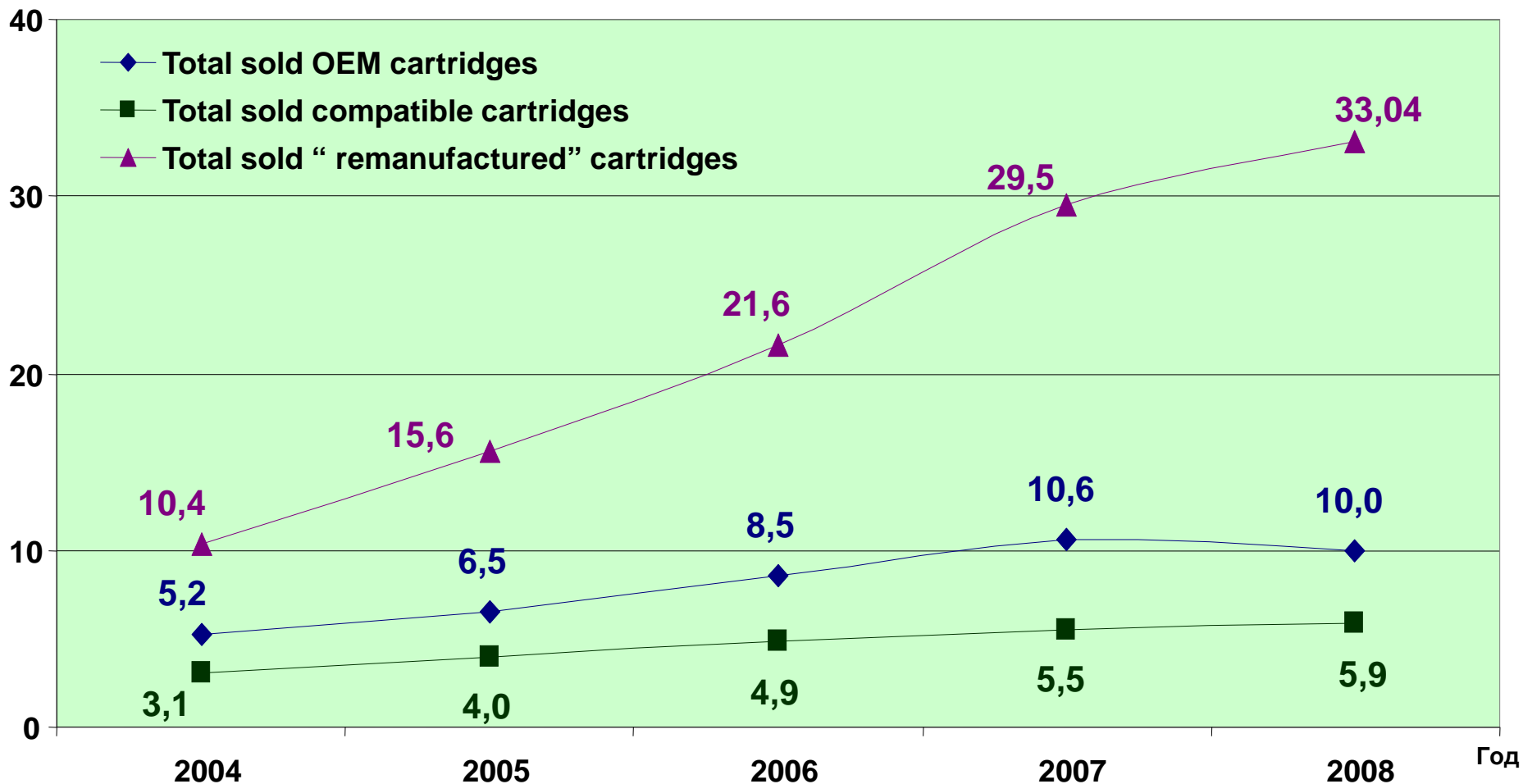
Russian laser printers consumable market status; Gray market

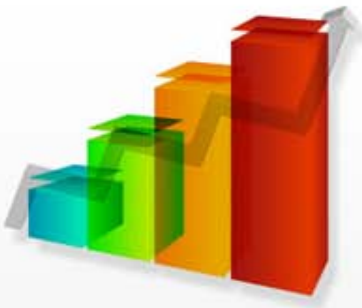




Russian laser printers consumable market status; segment 1 and 2 up to 45 pages/min

Sold cartridges, millions



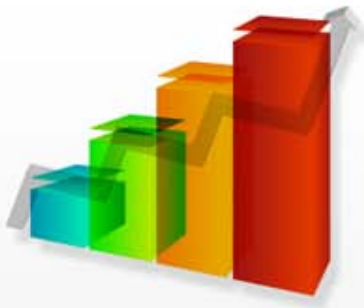


Russian agency “ Business Inform” products (SOLD BY RECHARGEAST MAGAZINE)

1. SALES VOLUME OF LASER PRINTERS (including MFUs – multifunctional utilities) IN RUSSIA AND ITS REGIONS.

Content:

- 1.1. Starting data and particularities of data treatment.**
- 1.2. Sales volume of laser printers grouped by vendors in regions of the Russian Federation.**
- 1.3. Sales volume of laser printers per market segments in regions of the Russian Federation.**
- 1.4. Assessment of offers for laser printers (inc. MFUs) of different manufacturers in regions of the Russian Federation.**
- 1.5. Particularities of the dynamics of sales volume in the regions of Russia.**
- 1.6 Russian distributors and resellers of laser printers and MFU.**

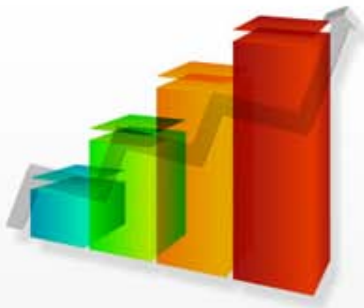


Russian agency “ Business Inform” products (SOLD BY RECHARGEAST MAGAZINE)

2. ANALOGUE AND DIGITAL COPIERS SHIPMENTS (inc. MFUs) IN RUSSIA AND ITS REGIONS

Content:

- 2.1. Starting data and particularities of data treatment
- 2.2. Analogue and digital copiers shipments grouped by vendors in regions of the Russian Federation.
- 2.3. Analogue and digital copiers shipments per market segments in regions of the Russian Federation.
- 2.4. Assessment of offers for analogue and digital copiers (inc. MFUs) of different manufacturers in regions of the Russian Federation.
- 2.5. Particularities of the dynamics of shipments in the regions of Russia.

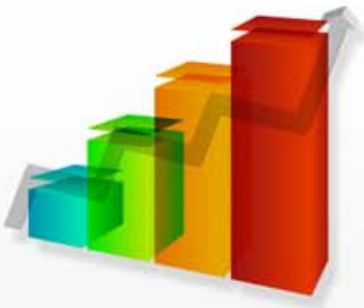


Russian agency “ Business Inform” products (SOLD BY RECHARGEAST MAGAZINE)

3. SHIPMENTS OF LASER PRINTERS, ANALOGUE AND DIGITAL COPIERS (incl. MFUs) IN RUSSIA AND ITS REGIONS

Content:

This report presents a combination of report 1 and 2, whose descriptions are given above.



Russian agency “ Business Inform” products (SOLD BY RECHARGEAST MAGAZINE)

4. SHIPMENTS OF IMAGING SUPPLIES FOR LASER PRINTING (incl. REMANUFACTURING) IN RUSSIA AND ITS REGIONS

Content:

- 4.1. Starting data and particularities of data treatment
- 4.2. The Russian market of laser printing and its main trends
- 4.3. The Russian market of original imaging supplies for laser printing.
- 4.4. The Russian market of compatible imaging supplies for laser printing.
- 4.5. The Russian market of laser cartridge “refilling”
- 4.6. The Russian market of imaging supplies for laser printing in general.