



Western European HCP Market, 1Q19: Hardcopy Shipments Continue to Contract in Line With Forecasts, says IDC

LONDON, May 10, 2019 — According to research by International Data Corporation (IDC), the Western European printer and multifunction (MFP) market decreased by 5.8% in unit terms in 1Q19 compared with the same period a year ago. This meant the overall market declined by 286 thousand units and price pressures led value to also decline by 4.1% to just over \$2.5 billion. There were few areas of growth and the negative start to the year will continue throughout 2019.

Inkjet shipments declined 5.4% to just over 3 million units and both A4 and A3 shipments recorded negative growth figures. Most declines were from printer devices, but MFP shipments also decreased more than 4%, but not all OEMs saw declines.

Laser shipments declined by 6.1% and as with inkjets there were few areas of growth. Some markets, such as A4 single-function printers, declined quite heavily, but there was small growth from A3 single function printers and A4 monochrome MFP devices. As fewer overall laser units shipped the value also declined, this time by 2.5%, even though some of the higher speed segments increased.

High speed inkjet devices also contracted in terms of units, but the value was up, and the serial impact dot matrix market continued its decline.

"The decline shown in 1Q19 was in line with expectations and the markets and this negativity is likely to be reflected throughout 2019, but there will be some growth from some segments," said Phil Sargeant, program director in IDC's Western European Imaging, Hardware Devices, and Document Solutions group. "The hardcopy markets are still very valuable to many OEMs and some traditional markets such as monochrome and inkjet are still very sizeable even if they are declining."

Highlights:

- The overall Western European hardcopy market contracted by 5.8% year on year in 1Q19, recording a shipment figure of 4.6 million units, while the value declined by 4.1%.
- A4 monochrome MFP showed a small increase of 0.8%, while A4 monochrome printers declined by 11.2%.

- In line with expectations, the A3 monochrome markets declined by double-digit figures.
- Most color laser segments saw surprise declines but there was solid growth from the niche A2 printer market.

Main Country Highlights

As always, country growth showed some increases and some declines, and although the Western European overall figures were negative, there were some positives in some countries. The main country highlights are as below.

Germany

The traditional largest market in Western Europe declined by 10.3% in 4Q19, which was a much poorer result than the European average. This represented a shipment figure of 1.1 million units. Inkjet, color laser, and monochrome laser shipments all declined, and the only areas of growth were in A3 inkjets, A3 color laser MFPs and A4 monochrome MFPs.

France

France's growth rates were worse than Germany's. There was an 11.8% decline to 81 thousand units and the only real area of growth was A4 monochrome MFP where growth was minimal. Business inkjets contracted quite heavily.

The U.K.

The U.K. market declined at a lesser rate than the market average at 4.1% to give a market size of 780 thousand units. A3 color laser MFP and printer shipments did increase, as to did A4 color laser MFPs, which performed better than most countries, but overall laser shipments did decline.

Italy

Shipments in Italy continued to show some positivity, although growth was a mere 0.3% for 625 thousand units. Inkjet shipments increased by 2.2%, which was better than most countries, and consumer inkjet shipments also showed quite strong growth. Monochrome laser shipments did decline, but again performed better than most countries.

Spain

Spain was the best performing country in 1Q19. It increased by 9.7%, with inkjet shipments particularly strong for both consumer and business inkjets. Both color laser and monochrome laser shipments did decline, however.

Notes:

- Source: IDC Worldwide Quarterly Hardcopy Peripherals Tracker, November 2018.
- All quarterly growth rates quoted are year on year (1Q19 versus 1Q18).
- IDC tracks A2–A4 devices in the Quarterly Hardcopy Peripherals Tracker.
- Hardcopy peripherals include single-function printers, printer-based multifunctional systems (MFPs), and single-function digital copiers (SFDCs). Data is reported for calendar periods.
- For more information about IDC's Worldwide Quarterly Hardcopy Peripherals Tracker in EMEA, please contact Phil Sargeant (psargeant@idc.com).

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