

Table of Contents

Executive Summary1

Introduction3

Forecast Methodology4

Scanner Segmentation Definitions5

 Workgroup (\$500-\$2K, <20ppm)5

 Departmental (\$2-6K, most 20-36ppm)6

 Low Volume Production (\$6-12K, most 36-50ppm)7

 Mid Volume Production (\$12-29K, most 42-85 ppm)8

 High Volume Production (>\$30K, >60 ppm).....9

Drivers of Document Scanning.....11

 New Market Opportunities11

 Color Models Bolster Sales12

 Scanning Awareness Expands13

Barriers to Document Scanning15

 MFP Vendors Challenge Scanner Vendors in the Office Market15

 Economic Impact.....16

 Color Compression Standards16

Trends in Document Scanning17

 Low End Scanners Attract Users.....17

 Interface Options18

Market Analysis by Segment.....20

 Workgroup (\$500-\$2K, <20 ppm)20

 Forecast Outlook20

 Shipments21

 Revenues/Average Pricing21

 Features21

 Key Players – Workgroup Scanners.....22

 Fujitsu22

 Eastman Kodak.....22

 Visioneer23

 Canon.....23

 Hewlett-Packard23

 Panasonic.....24

 Avision24

 Departmental (\$2-6K, most 20-36 ppm)24

 Forecast Outlook24

 Shipments24

 Revenues/Average Pricing25

 Features25

 Key Players – Departmental Scanners26

 Fujitsu26

 Hewlett-Packard26

 Canon.....26

 Ricoh27

 Panasonic27

 Other Players27

 Low Volume Production (\$6-12K, most 36-50 ppm)27

 Forecast Outlook27

Shipments	28
Revenues/Average Pricing	28
Features	28
Key Players – Low Volume Production	29
Fujitsu	29
Canon.....	29
Ricoh	30
Eastman Kodak.....	30
Panasonic.....	30
Other Vendors	30
Mid Volume Production (\$12-29K, most 42-85 ppm)	31
Forecast Outlook	31
Shipments	31
Revenues/Average Pricing	31
Features	32
Key Players – Mid Volume Production.....	32
Eastman Kodak.....	32
Böwe Bell & Howell	33
Fujitsu.....	33
Other Players	33
High Volume Production (>\$30K, >60 ppm).....	34
Forecast Outlook	34
Shipments	34
Revenues/Average Pricing	35
Features	35
Key Players – High Volume Production	36
Eastman Kodak.....	36
Böwe Bell & Howell	36
Other Players	37
Recommendations & Conclusions.....	38
2003 Document Imaging Scanner Forecast - North America	Appendix

Table of Figures

Figure 1 – Document Imaging Scanner Shipments (K); North America	1
Figure 2 – Color vs. Monochrome Shipments – Percentage of Total Shipments, North America..	2
Figure 3 – Color by Segment – Percentage of Total Shipments; North America	12
Figure 4 – Digital copier/MFP access within organization	13
Figure 5 – 2002 Shipments by Segment; North America.....	17
Figure 6 – Penetration of Interface Connections, North America.....	18
Figure 7 – 2002 Revenues by Segment; North America.....	20
Figure 8 – Workgroup Scanner Shipments (K); North America.....	21
Figure 9 – Workgroup Scanner Revenues (\$M); North America.....	22
Figure 10 – Departmental Scanner Shipments (K); North America.....	24
Figure 11 – Departmental Scanner Revenues (\$M); North America	25
Figure 12 – Low Volume Production Scanner Shipments (K); North America.....	28
Figure 13 – Low Volume Production Scanner Revenues (\$M); North America	29
Figure 14 – Mid Volume Production Scanner Shipments (K); North America	31
Figure 15 – Mid Volume Production Scanner Revenues (\$M); North America.....	32
Figure 16 – High Volume Production Scanner Shipments (K); North America.....	35
Figure 17 – High Volume Production Scanner Revenues (\$M); North America.....	35

Copying this document in whole or in part is expressly forbidden without the prior written consent of InfoTrends.

List of Tables

Table 1 – InfoTrends Segmentation Definitions 5
Table 2 – List of Workgroup Scanners Included in Forecast 6
Table 3 – List of Departmental Scanners Included in Forecast..... 7
Table 4 – List of Low Volume Production Scanners Included in Forecast..... 8
Table 5 – List of Mid Volume Production Scanners Included in Forecast 9
Table 6 – List of High Volume Production Scanners Included in Forecast 10
Table 7 – Workgroup Vendor Market Share (Unit Shipments) 23
Table 8 – Departmental Vendor Market Share (Unit Shipments) 27
Table 9 – Low Volume Production Vendor Market Share (Unit Shipments) 30
Table 10 – Mid Volume Production Vendor Market Share (Unit Shipments)..... 33
Table 11 – High Volume Production Vendor Market Share (Unit Shipments) 37