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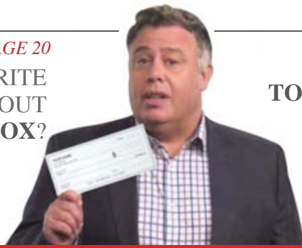
EXPO VISIT GIVES **20-20 VISION**

PAGE 20
WILL **HP** WRITE THE CHECK OUT TO **XEROX**?



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PAGE 24

—CEO Mindy Smith explains why she is confident

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UNLIMITED INNOVATION: KILIDER NEW PATENT ISSUED

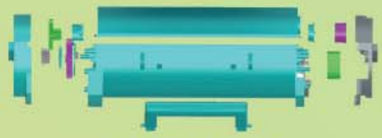
KILIDER
凯利德

Patent-free Toner Cartridge KLD-MX310
Innovation Patent No.: 201910495312.7

Patent NO.: 201910495312.7

KILIDER TECHNOLOGY CO., LTD recently got feedback from China State Intellectual Property Office that the patent application over our independent-design toner cartridge KLD-MX310 was approved. The patent right is granted by Innovation Patent NO. 201910495312.7, which has been listed up to our technology patent pool.

KLD-MX310



OEM-MX310

KLD-B600
Innovation Patent NO.:
201910050955.0

KLD-TNP48/TNP49
Innovation Patent NO.:
ZL201530297307.8

KLD-MP C8002/C8003
Innovation Patent NO.:
201910204654.9

KLD-C3371
Innovation Patent NO.:
201910203468.3

KLD-SP C352/C360/361
Innovation Patent NO.:
201910022355.3

KLD-NPG-73/GPR-57/C-EXV53
KLD-NPG-71/GPR-55/C-EXV51
Innovation Patent NO.:
201910029472.2

KLD-TK1200/1150/1160/1170
Innovation Patent NO.:
201811374841.3

KLD-TN-321/512/323/514
Innovation Patent NO.:
ZL201530297297.8

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IMAGING WORLD

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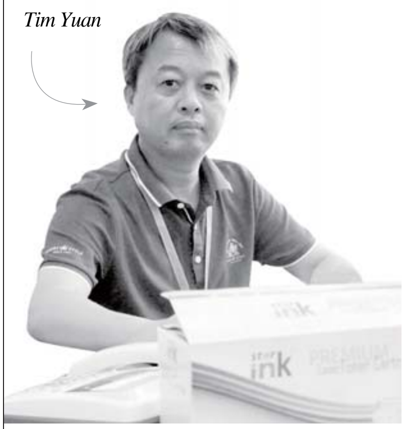
Photo credit: Tricia Judge

Thousands of visitors from all over the world will descend upon Zhuhai from across the world in October looking for NEW solutions to the OEM firmware upgrade problems, toxic decaBDE cartridges, and reliability of new-build cartridges. They will seek out NEW suppliers of toners and inks and components. They will search for opportunities from the NEW range of label, handheld, thermal, UV, dotmatrix, laser and ink printers and copiers on display.

FEATURES

Tim Yuan

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Zhuhai City, Guangdong, China

Natalia Zhou

"What in the world IS going on? Progress. You cannot stop progress. Good for some, bad for others, but always an opportunity." Here I quote from Steve Weedon's column "Keeping Up" on page 52. Indeed, we are witnessing changes in this industry not seen before, including Clover's declining revenues and debt position, HP's and Xerox's new business arrangement, Dinglong purchasing Speed and Pantum's aggressive performance in the India market. The imaging and printing industry is full of energy reminding us all it is a time of change.

Meanwhile, RemaxWorld has also changed. It's not the same show that started in 2007. This year it will morph into an international office equipment and consumables expo. Besides new cartridge products being launched, you will also see the latest printer solutions for laser, inkjet, label, UV and other special printing machines. Have a look at the China-made brands on page 46. Yes, you will find printer and hardware solutions at RemaxWorld this year. 2019 begins a new era for China's printer manufacturers.

Still worried about the DecaBDE? Maybe you have never really understood what it is, other than a nasty toxin inside some printer cartridges. Graham Galliford dives deep into the topic to explain it all clearly for you on page 14. He will separate the bias from the fiction and share the truth on this controversial hot topic. For NBC manufacturers the path forward is clear. They must ensure that the cartridges that they produce comply with the regulations in the markets they are serving, which will soon include the U.S. as well as the European Union.

The "ping-pong" match between China and the U.S. over tariff games continues to change, sometimes daily. Our special correspondent Merritt Blakeslee from Washington. D.C. provides us with an update on how the Sino-U.S. tariffs impact the aftermarket printing consumables industry.

Hold onto your magazine and come to RemaxWorld, meet the editors and authors here, and share your thoughts with us. More importantly, you will find new opportunities in Zhuhai to grow your own business at this bigger, better show!

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MPS and Cloud

– Their Impact on Transactional Sales Models

Mark Dawson

Dawson joined the imaging supplies industry in 1987, as a graduate mechanical engineer, and began his career in quality assurance and then production management before moving into sales & marketing. He has an MBA from the International Business School in Breda and has held senior positions with both American and European Corporations, including MSE and Clover. He is currently a Director with IOP (Internet of Printing) whose mission is to help independent resellers develop new revenue streams and optimize margins. For questions about DaaS he can be reached at mark@iopbv.com

There are two unstoppable forces driving the acceleration of Managed Print Service and the Cloud. These are: changing OEM strategies and user behavior. They will have a profound effect on those of us still operating transactional sales models.

To understand current OEM behavior, we must recognise the reality of a shrinking market. We can study page volume, or hardware shipments, or aggregated OEM sales revenues. The message is the same: The market is declining by 7 percent per year. There is no natural growth for OEMs to "sell" to their investors.

I observe two distinct OEM strategies

One is focussed diversification where OEMs like Ricoh are transitioning to communication/IT businesses. Their goal is to deliver at least half of global sales revenues from non-copy/print activities within three years. Senior leadership teams expressly exclude executives with a copy/print background.





The second strategy is the cash cow. HP is executing it now. Since it split at the end of 2015, industrial-grade servers, networking solutions and SaaS went to HPE, leaving HP Inc with the PC and printing businesses. For HP Inc, "doing a Ricoh" is not feasible, so a different approach is underway.

In mature markets, share drives profit and cash. HP Inc is still driven by quarterly performance and Wall Street. So, all eyes are on market share and cost reduction. The only way to expand share in a shrinking market is to take it from competitors.

HP will drive consolidation to achieve that. Having already digested Samsung, Xerox will be next. The announcement in June this year that HP and Xerox are "expanding their business relationship" indicates that an acquisition is already in process. I would be surprised if it does not happen within the next 18 months. It will deliver a quantum increase in market share and will provide huge cost reduction opportunities, most notably with headcount. Further acquisitions will follow. This cow will deliver a lot of cash!

Other OEMs are not the only competition. Grabbing back the significant share held by our industry is very much on the agenda. We need to be ready for what's coming. When MPS meets The Cloud, we get DaaS or "Device as a Service."

It is not news that HP is getting closer to its end customers

Reseller-only OEM sales models have been dead for years. Channel partners cannot drop HP because it is selling direct since all OEMs are doing that. HP's acquisition of Apogee shows the importance of direct business which blends up gross margin and makes customers stickier.

We see a new generation of HP devices that cannot be purchased transactionally by resellers or users. Such devices can ONLY be purchased and sold as part of managed contracts. The OEM toner solution is protected to a far greater extent, even compared with previous MPS models. Firmware tricks allow the release of additional yield and/or printer speeds for "compliant" users/resellers. The goal is to automate everything and to reward resellers for real performance. OEM activity is more sharply focused than ever on data collection. Understanding where every device is located, where it was sourced, how it is performing and how much revenue it is generating, is the power goal.

Traditionally, HP MPS resellers were rewarded on reported sales. Attractive discounts on "contract" toner cartridges could be secured at the quote stage. This is over. It is now all about rewarding resellers that deliver managed contracts with real profitability. Fast Track Channel MPS (CHAMPS) programs are being rolled out to all enterprise verticals to accelerate adoption.

The profile of the desirable channel partner has changed too. The copier resellers that evolved into MPS players are becoming less important, while IT Resellers are becoming more important. They are critical for the successful execution of the new strategy. They are usually bigger, more dedicated and more comfortable with disruptive business models. HP has a head start due to its PC business where its IT resellers already understand DaaS.

As Xerox noted in its press release: "…the companies have agreed to partner in the Device as a Service (DaaS) market. Xerox will become a DaaS specialist in HP's Partner Programmes. Xerox's


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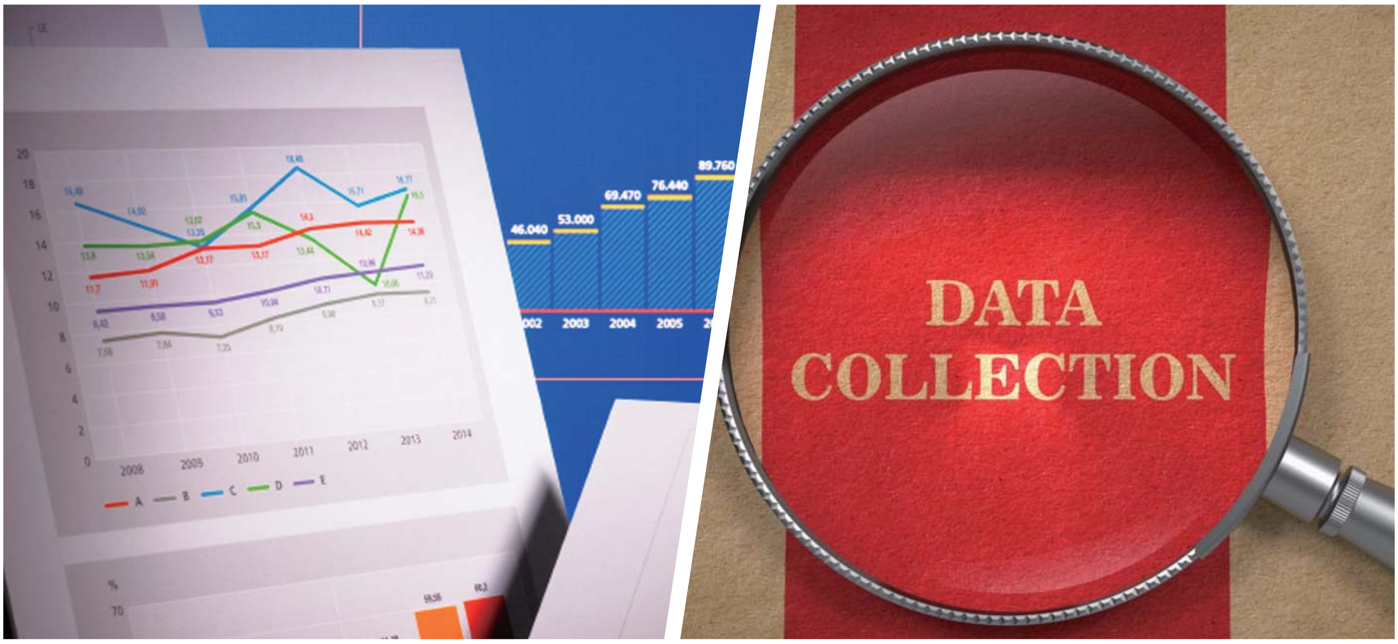

services capabilities and customer reach, combined with HP's award-winning DaaS PC offerings, will allow both companies to meet a wider range of customer needs."

So, on the one hand, we have OEMs moving even further into contractual automated relationships with customers to increase market share with an approach that optimizes customer stickiness.

On the other hand, we have changing user behavior. The expectations about how services are consumed have changed. Workplaces are dominated by Generations Y and Z. These employees are tech-savvy. They bring demands for state-of-the-art devices, instant access to information, and the provision of self-service. Organizations must meet these demands within existing IT budgets. This culture is driving the adoption of DaaS, which is presented as a solution to improve user experience, reduce costs and simplify ownership. (I suspect that DaaS will not always reduce costs. MPS did not always reduce costs either, but that did not curtail its adoption).

Existing legacy systems and aging devices don't meet new user and application demands. Thus, corporate enterprises need to lower the total cost of ownership (TCO) of their devices while increasing financial flexibility. This all needs to happen at a time when TCOs are facing resource challenges. Too much time is spent on the administration of existing device lifecycles. The challenge of managing assets has become more complex because there are so many third-party providers involved in delivering support.

Imagine one model that delivers full end-to-end solutions from a single provider for all assets, with just one point of contact. This is DaaS. It is a new procurement strategy that combines device leasing and managed services into a single predictable monthly payment with one provider. It encompasses laptops, desktops, tablets, smartphones, and crucially all hard copy output devices. IT resellers are well-positioned to provide a full service. To survive, traditional MPS players must transition to Managed Service Providers (MSPs) that can deliver DaaS. The user needs predictable monthly payments and guaranteed lifecycle support. Users want and need to transition from large upfront investments to an on-demand model. It's the way of the world today. Don't pay for the asset. Pay for using the asset.

We need to understand both the changing requirements of the user and the changing strategies of the OEMs. It is not a coincidence that these changes are happening in parallel. They will eliminate the transactional market. They don't discriminate between new build compatible or remanufactured toner cartridges. All of us are impacted.

The good news: DaaS and Life Cycle Management will lead to increased asset refreshment. This will create a huge opportunity to embrace refurbishment of assets and to design our own DaaS programs that offer users better value than the OEM DaaS programs. We can incorporate our supplies into those programs.

In the end, everything changes ...but nothing changes. We still have a strong value proposition. But we must update our go-to-market strategies and change how we deliver that value proposition. ■

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The Controversy Over Cartridge "Contaminants" – An Attempt to Avoid Bias

Graham Galliford

Galliford is a world-renowned consultant, researcher, writer and speaker for the global imaging industry. His work has encompassed technologies in a variety of printing components and products but has worked primarily in the field of toner-based printing technology since 1974. He can be contacted at graham@gallifordconsulting.com.

Recently, there has been much discussion, publication and conjecture by industry, government and non-governmental bodies particularly in Europe regarding the chemical constituents of structural parts of toner cartridges notably that of New Build Cartridges (NBCs) from China. Quite naturally, fact, opinion and rhetoric has been expressed from juxtaposed positions and has included words such as fraudsters, cheats, illegal, banned, imitation, contaminated, polluted, unscrupulous, scandal, harmful, endangerment, etc. The controversy has centered on the chemical analysis of cartridge parts indicating the content of PolyBrominated Diphenyl Ether (PBDE) and including decaBromoDiphenyl Ether (decaBDE). Much has been written about these materials already and, not to unnecessarily add to that already out there, here are some points relevant to the matter at hand.

What is a PBDE?

PBDE is a class of chemicals that retards burning of inflammable material. PBDEs are not single chemicals but are mixtures of several PBDEs. The PBDE class consists of 209 possible substances each having the basic structure of two phenol groups joined by an oxygen atom. The different PBDEs are “brominated” (i.e. reacted with bromine) to different extents with between one and 10 bromine atoms. The properties of each PBDE differ including its tendency to bioaccumulation, physical properties and level of toxicity.

DecaBDE, which has the maximum level of bromination, has been used in electronic enclosures, television cabinets, wire insulation, conveyor belts, awnings, carpet backing, tarpaulin/canvas, curtains, rainwear, fabrics for motor vehicles, hot-melt adhesive and architectural foam typically between 2 and 25 percent concentration and in paper foil laminate for home insulation in 18 to 41 percent concentration. OctaBDE is found in plastics for business equipment and pentaBDE for cushioning and upholstery.

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What are the Known Effects on Health?

According to a May 2019 report by the Australian Government Department of Health, decaBDE exhibits low acute oral, skin and inhalation toxicity and very low skin absorption in animals. DecaBDE is not a skin or eye irritant and is not cytogenetic (carcinogenic). Repeated ingestion shows low systemic toxicity even at a high level. It states, "A clear interpretation of the significance of this report for human health has not been established. It is not classified as a carcinogen." As decaBDE is a solid with extremely low volatility no significant exposure to the vapor at ambient temperature is expected. Public exposure is dominated by indirect exposure via the environment, inhalation or ingestion of decaBDE-containing dust released from articles in a house, vehicle or workplace.

Actually, nothing definitively is known about the health effects of PBDEs in humans and information regarding toxicity of PBDEs is from animal studies. PBDEs are not known to cause cancer in humans.

What are the Regulations on PBDEs?

PBDEs may no longer be produced in the U.S. or Europe but are still present in many items in homes, offices, factories, cars, trucks, planes, ships and elsewhere. Regulation of the use of PBDE flame retardants varies according to geographical location. In Europe, decaBDE is banned as a discrete substance but is NOT a banned material in articles or in mixtures.

The European Chemicals Agency (ECHA) regulation of decaBDE mandates that it:

1.shall not be manufactured or placed on the market as a substance on its own after 2 March 2019.

2.shall not be used in the production of, or placed on the market in:

a.another substance, as a constituent

b.a mixture;

c.an article, or any part thereof,

in a concentration equal to or greater than 0.1 % by weight, after 2 March 2019. i.e. 1000mg/kg.

Recent review by the European Council recommended to change this to 500mg/kg.

On July 29, 2019, the US EPA, seeking public comment, notified of proposed legislation that would restrict decaBDE. The EPA is proposing to prohibit the manufacture, processing and distribution of DecaBDE, and articles and products containing DecaBDE with important exceptions. The EPA is not proposing to prohibit the processing for recycling of plastic from articles containing DecaBDE, the distribution of such plastic, either before or after recycling so long as no new DecaBDE is added during the recycling process. The EPA says that, "EPA is aware that many different types of articles that contain plastic are recycled at the end of their useful life, and some of these articles, such as electronic equipment, were originally made with a flame retardant like DecaBDE. The EPA recognizes the importance and impact of recycling, which contributes to American prosperity and the protection of our environment. In addition to helping to protect the environment by keeping valuable materials out of landfills, the U.S. recycling industry is an important economic driver and provides more than 757,000 jobs and $6.7 billion annually in tax revenues. EPA does not want to create disincentives for recycling by increasing the burden on the recycling of plastic. EPA believes that it would be overly burdensome and not practicable to impose restrictions on the recycling of plastics that may contain DecaBDE, or on the use of recycled plastic in plastic articles, because the DecaBDE is typically present in such articles at low levels." There is an option in the proposed legislation to restrict the total PBDEs to 1000mg/kg which may or may not be enacted. However, the EPA recognizes that requiring industry to meet a level of 0.1% in recycled plastic articles would result in a significant burden to test their products. They recognize that most testing methods cannot distinguish between PBDEs and for this expensive, time consuming testing would be necessary and therefore, the EPA does not believe this option is practicable.

According to some experts in the field, reduced levels of flame retardants in plastics makes it difficult to recycle them which potentially increases the burden on landfilling and air pollution.

What Happens to PBDEs when they enter the environment?

PBDEs can be released into the air, water and soil at places where they are produced or used. Despite the phase-out of penta-, octa- and deca-BDE, vast amounts of older televisions, computers and furniture containing polyurethane foam still contain PDEs and these products are intended to be used for several more years.

PBDEs have very low water solubility and when these substances are released into water e.g. from a landfill they typically bind to sediments. These substances generally bind strongly to soil particles and therefore do not move easily through soil layers. Food items including fish, meat and dairy products have been shown to contain low concentrations of PBDEs.

How are Humans Exposed to PBDEs?

DecaBDE is a ubiquitous global contaminant routinely detected in air, soils, sediments and living organisms and this is from the release of the chemical from articles during use, from plastics manufacturing facilities, and from recycling facilities.

DecaBDE readily adsorbs onto the surface of dust, the movement of which is the main transmission mechanism through the environment. The highest concentration of dust is found near electronics' recycling facilities and plastic and foam manufacturing facilities.

The primary route for exposure is from ingestion of PDBE contaminated dust in

indoor environments accounts for 80 to 90 percent of total PBDE exposure. The remaining exposure is from food, especially from foods with high-fat content. In breastfeeding infants, breast milk may be a major source of exposure. PBDEs have not been detected in drinking water to any significant extent.

Different PBDEs enter and leave the body dependent upon their chemical structure. Once in the body, PBDEs partially breakdown into what are called metabolites. These leave the body in feces and a very small amount in urine. DecaBDE tends to be eliminated faster than the lower-brominated PBDEs which can stay in the body for years in fat.

Where is PBDE found?

PBDE levels in the environment and humans worldwide varies considerably, depending on the region and the historic and current pattern. Historically North America consumes over half of the world's PBDEs. Lower brominated PBDEs have been found in places distant from their use or production and have been detected in low concentrations in North American air, water and sediment. PBDE concentrations in North American sewage sludges are ten times greater than European levels. DecaBDE in the North American environment is concentrated in urban areas and where sewage sludges have been applied.

At present, flame-retarded consumer products manufactured 10 to 20 years ago, when PBDEs were frequently used, are being dumped and disposed of making major sources of emission into the environment effluent and flue gases.

So What?

It's simple and complicated at the same time. On the one hand, the use of decaBDE rightly is variably regulated by authorities in jurisdictions around the world. On the other hand, the historic use of this category of materials in goods including structural components of cartridges is a fact of the present. The use by plastic product manufacturers of post-consumer plastic ground feedstock is pervasive in general and typical in printer cartridge component manufacture. I believe this to be the major source of the higher than permissible levels of decaBDE in cartridge components. The control of the composition of input post-consumer plastic ground feedstock is difficult, but not impossible, and given the imposed regulation around the world, this must now be an important consideration for manufacturers to avoid legal actions against them. That any manufacturer deliberately has produced any article to contain a level of PBDE above the legal limit is difficult to believe, but that manufacturers have not paid attention to the quality of input post-consumer plastic ground feedstock is much more plausible. For NBC manufacturers the path forward is clear. They must ensure that the cartridges that they produce comply with the regulations in the markets they are serving.

USA Takes DecaBDE Action to Reduce Toxic Chemicals in Printer Cartridges

The EPA is calling for public comment ahead of a ruling that will reduce exposures to certain chemicals including DecaBDE in the United States.

This follows action taken by the European Council and the European Parliament to ban all products containing toxic chemicals such as DecaBDE in a number of products including printer cartridges. Recently, both agreed to further restrict decaBDE that the maximum unintentional trace contaminant level in materials at 10 mg/kg for decaBDE in substances and that the sum of all PBDEs is 500 mg/kg in mixtures and articles. This continues currently to be under review.

On July 29, 2019, a proposed rule was published in the United States that would restrict or prohibit the manufacture (including import), processing, and distribution in commerce of certain persistent, bioaccumulative, and toxic (PBT) chemicals including decaBDE. Links to the proposed rule and other information on decaBDE can be found on EPA's website. ■

Learn more about the USA taking DecaBDE action

Alexandra Dapolito Dunn
the Assistant Administrator of EPA's Office of Chemical Safety and Pollution Prevention

Document: "Environmental and Human Health Hazards of Five Persistent, Bioaccumulative, and Toxic Chemicals";

Document: "Exposure and Use Assessment of Five Persistent, Bioaccumulative, and Toxic Chemicals"

When Will HP Write the Check Out to Xerox?

Ray Stasieczko

Over the last 25+ years, Ray Stasieczko has called the imaging industry (Copy/print) home. He was COO/Vice President of ImageQuest over the past years. Ray has a deep understanding of the transformation happening in the industry, and his rich experiences allows opportunities for others to navigate through the transformation. raystasieczko@gmail.com

Well, it has been about 20 months since I told the crowd I was speaking to at the RemaxWorld Summit in Zhuhai China that HP would buy Xerox. Soon after, another speaker would educate the audience how that was never going to happen. I believe anyone who says "that will never happen" is void of the ability to imagine.

"That will never happen continues to show up and surprise the unimaginative."

I also spoke of the bigger threat for the remanufacturers. I stated it would not be the non-patent infringing new builds. It will be the OEMs as they fight to capture the aftermarket in a declining industry.

With all of the recent strategic developments between Xerox and HP, one could easily conclude they will soon share boardrooms. I vision the brand name "HP-Xerox" and here are a few reasons why:

1.In this recent partnership, Xerox hands HP tens of millions in the supply business. Remanufacturing giant, Clover, will notice the impact of this along with any others that have been providing Xerox with non-OEM, HP supplies. Keep in mind Xerox has a massive population of HP printers on Managed Print Service contracts. Xerox to this day is recognized as the world's largest Managed Print Services Provider. It would be hard to imagine that HP is


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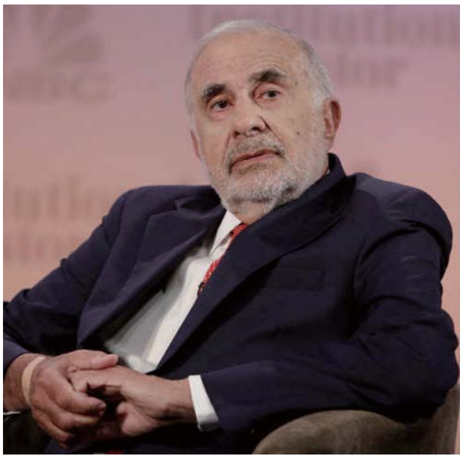

going to allow someone else to pick up Xerox now.

2.HP is still struggling to gain acceptance into the dealer distribution channel. Xerox would give HP that direct distribution which is something HP desperately seeks. HP understands the BTA channel is the path to contractual agreements. HP also sees this as the path to A3 placements (Note: I cannot see HP succeeding with their A3 focus. Those who follow my writings or watch my videos have heard me speak of the A4 revolution. The data clearly defines that over 80% of the A3's in the market place could easily be replaced by A4 devices. Those who continue to beat the A3 drum will be recognized as product-centric organizations and will face challenges from customer-centric innovators.)

3.Xerox will sell. Their "for sale" sign out front is not coming down. Xerox set up a holding company, have cut tremendous fat out of their infrastructure, and are continuing to align to Carl Icahn's vision of being Xerox brand focused. HP is one of the few in the space which could afford the price and could also benefit from the acquisition. HP computer equipment would also add significant value to the Xerox customers. HP has been ramping up its global finance business, and Xerox is unwinding theirs. Soon HP-Xerox will be delivering print equipment in DaaS models along with HP computer equipment. HP needs direct access to end-users, and I believe they will write the check to Xerox to get that access.

Today all industries must have the ability to imagine what could be based on what should be. Those who still believe competition will stay as it was in 1990 will be surprised. The print equipment and its services industry analyst continue to make one major mistake. They keep looking toward the future through the lens of their memories instead of their imaginations. Too many analysts see the future as more of what things were, instead of what things will become or should become. Too many analysts are focused on making those they analyze happy. They tell them what they want to hear instead of what they need to hear.

In a market where revenues and print volumes are declining, HP and Xerox took a big step forward with this latest's agreement. It would be delusional to believe either will begin walking backwards. During these unprecedented times of innovative disruptions, many strange bedfellows will emerge. ■

RT RemaxWorld SUMMIT ZHUHAI · CHINA OCTOBER 17-19, 2019

Meet *Ray Stasieczko* at the summit at RemaxWorld on October 17-19, 2019. *Ray Stasieczko* will speak on American Printer and Copier Market Disrupted: How It Affects You.

The US Toner Wars

The market is consolidating and most definitely reducing in customer demands. The remanufacturing and the new build compatible industry has never been a majority of the overall cartridge business. Some experts say around 20-25% of the market and much less regarding color cartridges.

Over the last couple of decades Clover has bought most of the independent remanufacturers and along the way, they also pretty much cornered the market on the collection of empty cores. Clover will soon if not already be collecting more empty cartridges than they sell. HP has already been putting pressure on Clover by applying substantial price reductions to shut them out of key accounts.

HP's recent news of their agreement with Xerox will heavily impact the remanufacturing industry. Xerox was likely the largest buyer of NON-OEM HP toner in the world. This new agreement will now mean Xerox will use HP OEM supplies in the millions of HP printers that Xerox has on Managed Print Service Contracts.

The OEMs will focus on beating down the largest remanufacturers then they will focus on the nonpatient infringement new build manufacturers. I think some of the OEMs will, in fact, partner with, or acquire these new build manufacturers allowing them to lower their supply cost. The OEM's are not going to lay low in a declining market and will fight viciously for their aftermarket business.

The silver lining in this competitive landscape. Is that the smaller regional remanufactures might have a play and will not concern the OEM's as they will focus on finishing off Clover and watching for those new build manufactures who violate patents.

The alternative cartridge business will reduce in percentage, and those who survive can provide alternatives to end-users.

Meet Ray Stasieczko at Zhuhai on October 18. Stasieczko will share more updates for those affected or interested in the US market.

The Ladies of Liberty Laser

Tricia Judge

Judge has served as the executive director of the International Imaging Technology Council, a not-for-profit trade association serving imaging supplies remanufacturers and dealers for 19 years. Judge was the executive editor of Recharger magazine. A lawyer for 30 years, Judge also has litigation experience. Judge's work has been published in Recharger, and several other industry magazines, and has won critical acclaim for her writing and industry advocacy. She has assisted in the preparation of six friend of-the-court briefs. Judge has presented the position of the industry to the U.S. International Trade Commission. She can be contacted by email at tricia@i-itc.org

Liberty Laser is an old-school, totally in-house, all-American remanufacturer. As a result, it might be suffering from eroded margins from Chinese new-built cartridges. Or losing share to new, cutthroat OEM competition.

It's not. Moreover, its sales have grown for six sequential years. In this regard, Liberty Laser is an enigma.

At the helm of Liberty Laser is a woman who is almost as enigmatic as the lady that stands guard in New York harbor. Mindy Smith is a pensive, petite, soft-spoken woman who invites comparisons to polished Harvard MBA holders.

But she isn't in a corporate boardroom in a big city. She is in her element in the small town of Marseilles (pronounced "mar-sales"), Illinois, running Liberty Laser, with her foil, the gregarious Shelly Eastman, at her side. The ladies of Liberty Laser stand alone in a sea of men-driven imaging supplies manufacturers, remanufacturers and dealers, and they hold their own just fine.

Liberty Laser is also an enigma in that it bucks the current trend of declining sales for remanufactured cartridges. It has enjoyed 20 percent growth each year for six years in a row. How is it doing that? "I believe that remanufacturing is a model that can still work," Smith said. "Customers do buy for environmental reasons and still care about supporting U.S. manufacturing."

Smith is also always exploring ways to improve her products and the bottom line. For the latter, she works closely with her sales department to scrutinize her customer

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base. She not afraid to turn away business that is not profitable.

As a result, they have built for growth, but growth that is sustainable and organic. They work with a network of dealers of all sizes. No customer has more than eight percent of Liberty's business, and that allows for smooth production and sustainable growth.

Single Cell Manufacturing Process

Liberty's customers have many reasons to choose its product, but primarily, they buy for the quality built into each cartridge. Liberty Laser has held fast to the use of single-cell remanufacturing, where in-house cartridge "experts" use well-established methods to make top-quality imaging supplies.

Each employee undergoes 90 days of extensive training before moving into one of the regular production cells. Training includes seminars, lectures, and hands-on experience. The importance of quality is stressed repeatedly. All builders, even their most seasoned, participate in retraining and refresher courses.

"We believe that strong quality performance requires accountability," Smith said. "Our single-cell manufacturing process ensures accountability throughout the lifecycle of each cartridge." Liberty's technicians are divided into cells or workgroups of one to five employees. Each individual technician is responsible for the building of each cartridge from the breakdown process to the remanufacture and post-production test. Each cartridge is barcoded at the end of this process. "This gives each cartridge a DNA and allows us to track and monitor our quality processes," she said. "And modify them to continually improve our systems."

Meanwhile, the research and development team is testing new products and components. "We're proud to make a great cartridge," Smith said, "but we're always looking for ways to make a better one."

Liberty's success in cartridge remanufacturing can be attributed to several factors, one of which is that they remain focused on the laser aspect of the imaging supplies business. They currently offer over 600 laser SKUs for a wide variety of printers, fax, and copy machines. Early on, Liberty was recognized in the industry as a MICR specialist and has used that expertise to expand offerings in both color and monochrome products as well.

Today, Liberty has fine-tuned its remanufacturing processes and has expanded its production capabilities. "We can handle large volumes now," Smith said. "We're busy, but built for growth."

Liberty is looking to build relationships more than just engage customers. "Our ideal partners are independent dealers anywhere across the country, with product needs from $2,000 to $250,000 per month."

Liberty stocks a large amount of inventory to ensure it's meeting its dealers' needs. Even more important than its ability to deliver merchandise rapidly, is Liberty's effort to provide exceptional customer service. "We have a knowledgeable, cross-trained support staff that will personally answer every one of your calls," Eastman said. "Additionally, we have a professional technical support hotline accessible to all of our partners."

"We continue to grow and expand our services and capabilities at an aggressive rate year over year due to our commitment to excellence and innovation," Smith said. "We are ready to meet the continued demand of a thriving business, and it is our goal to help our customers grow and thrive with us. We are more than just a remanufacturer to our customers. By understanding our customers' business needs, we form long and lasting partnerships."

Liberty Laser operates under an environment of stringent quality control systems and procedure to ensure the highest possible level of customer satisfaction. All steps in the manufacturing process are scrutinized. From the virgin cores and manufacturing components coming in, to the final cartridge being shipped out of the facility, all products are subject to a visual inspection, pre-testing, post testing and then barcoding. With these procedures and coding in place, everything can be tracked.

"We can trace every cartridge from the vendor we purchased each component from, to the cell that created it," said Smith. "This creates accountability throughout the entire production process." For quality assurance, Liberty's quality-control team pulls cartridges daily from its shelves. "We will continue to focus on producing quality," Smith said. "And never sacrifice quality for price."

When quality in toner cartridge remanufacturing became the foundation of Liberty's business, Smith sought to be an industry example for the pursuit of quality. With this in mind, Liberty Laser Solutions became certified with the STMC, and routinely tests all cartridges according to its mandates. To go one step further, its production manager Chris Link joined the STMC committee.

Liberty Laser's management also cares about the health of the industry in general and has been a member of the International Imaging Technology Council for more than a decade. "Year over year, Liberty's reputation continues to hold strong because of our commitment to the remanufacturing industry," Eastman said. "And our ability to adapt in an everchanging environment while staying true to our values."

Liberty opened its doors in the mid-1990s, in Marseilles. Troy and Mindy Smith were making cartridges in their garage, down the street from where Jim Schifelbein, one of the original founders of Clover, was making cartridges in his garage. At age 5, son Jacob Smith chose then name "Liberty Laser" because of his affinity for the statue.

Five buildings later, Liberty is housed in a 55,000-square-foot (16,764 sqm) combined manufacturing and distribution center. In 2015, Liberty opened an additional distribution center in Long Beach, California for its west coast customers. Liberty holds numerous certifications from the Women's Business Enterprise National Council (WBENC), Historically Underutilized Business Zone (HUBZone), Women-Owned Small Business (WOSB) and is also TAA Compliant.

Smith delights in talking about the contributions her two children are making at Liberty. Both son Jacob and daughter Madi are in the sales department. But don't think nepotism is in play here. Both children are required to prove themselves and won't be on the management team anytime soon. "They have to learn the business the hard way, just like we did," Smith said.

Good country values are apparent as members of the Liberty team share their thoughts on what has made them successful. Expressions like hard work, perseverance, integrity, humility, teamwork, and loyalty are not just motivational posters on the walls here.

Most of Liberty's 77 workers have been with the company for decades. Dan Lowery, national sales manager, met Troy Smith, Mindy's husband through their mutual love of music. Lowery has now been with the company for over a decade. His role at Liberty finds him traveling all over the country, helping dealers close business. Jacob Smith enjoys forging relationships and telling the Liberty story. He especially finds it "exciting to go against the big boys."

Jacob Smith especially loves the recycling and environmental aspect of remanufacturing cartridges. "Liberty Laser reuses 85% of all cartridges brought in through recycling in their build. This keeps them out of landfills. That's a terrific contribution."

"We care about our environment," Jacob Smith said. "That's why we provide our partners with the necessary tools to recycle your empty toner cartridges through our comprehensive toner core recovery, recycling, and buyback programs."

Liberty cares, about its impact, its workforce, and most about its partners. The Smiths have survived and thrived by doing the right things, even when others weren't. Liberty is and has been, an old-school, all-American true industry leader. ■

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Hardware trends in key global markets

Barbara Richards / Deborah Hawkins (Keypoint Intelligence)

Each year, Keypoint Intelligence reviews the state of the office equipment market in key regions of the world, including North America and Western Europe. This includes an overview of trends impacting hardware sales as well as predictions for sales growth looking forward. This article is an extract from our latest analysis.

Hardware introductions

In 2018, over 160 laser printers and multifunction printers (MFPs) and 60 inkjet devices were

launched in the U.S market, compared to more than 100 laser printers and over 20 inkjet devices in Western Europe.

Office equipment manufacturers (OEM) continue to develop digital peripherals that are more user friendly, appealing to the modern worker, and filling gaps in portfolios. The emphasis in the industry is shifting away from speeds and feeds towards the wider device ecosystem; however, hardware continues to provide the backbone for solutions and services that help companies address difficulties in the document workflow. Even though the market is mature,

Source: BLIQ Database

manufacturers continue to search for innovative features and functions to ensure continued attractivity.

Key product introductions included:

- Canon's new A3 business inkjet MFP
- HP's Tango printer with cloud-based wireless
- Toshiba's new line of e-STUDIO MFPs delivering speeds up to 50 pages per minute
- Brother's next generation printers and all-in-ones
- Sharp's range of ten black & white A3 devices with common parts and accessories
- Lexmark's A3 line-up
- Epson extension of its Workforce Pro range

In addition, Kyocera announced its intention to enter the high-speed cut sheet inkjet market.

Overall sales performance

Overall, the total North American single-function printer and MFP market declined -3.7% year over year (in terms of placements), while the Western European hardcopy market decreased -3.6%. This was driven by a decline in consumer or small office/home office (SOHO) inkjet shipments. In addition, the decline in single-function laser printers at the sub-20 ppm speed segment continued. There is a general shift away from printers for desktop and personal use, whether in the home or in the office, and movement towards shared devices that offer richer feature sets.

Inkjet trends and opportunities

In 2018, Western Europe saw placements of page-wide inkjet (Segment 4) devices increase an impressive 22.6%. HP, the current market leader of this segment with a massive 99% share, expanded the plans for the PageWide range to comprise A4 and A3, which are complementary to HP's already extensive laser range. While North American page-wide inkjet growth was much more muted (1.3%), InfoTrends forecasts this segment to grow at a 9.7% CAGR through 2023 as inkjet biases in the office begin to change and their TCO value resonates with both channel partners and end-users alike.

In fact, a recent InfoTrends survey of office equipment channel partners showed that of those resellers (from traditional office equipment and IT resellers combined) 58% stated high-speed inkjet is an opportunity to offer their customers more cost savings—from TCO, energy consumption, and service costs.

Furthermore, it is likely that we will see other players challenge HP in this segment in 2019. Both Epson and Canon are expected to become strong and active participants. In the past year, the general

The RISE of China's Printer OEMs
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consensus by resellers appears to have shifted to favor the in-line head inkjet.

Another notable finding in the inkjet space is a 14.8% increase in Segment 3 (SMB) inkjet placements in North America in 2018, and 10% growth in this segment in Western Europe—fueled by vendors like HP, Brother, Canon, and Epson. There is a growing acceptance of multi-tank technology in this speed class, which offers significant cost savings with high-yield ink reservoirs that, in some cases, limit the need to replace the ink up to two years depending on print volumes.

Laser trends and opportunities

In the laser market, growth can be observed in a variety of subsegments—particularly those involving color MFPs. For instance, in 2018 within Western Europe, placements of 21-30 ppm A4 color MFPs saw 37% growth year over year. In terms of market share, HP leads this group followed by Brother and Kyocera. While the copier vendors represent only about a tenth of A4 color MFP placements, Canon and Xerox are showing the strongest positions and increasing shares.

One notable area of growth in North America is in 45-69 ppm color MFPs, which saw placements grow 16.3% year over year in 2018. A3 color MFPs represented the bulk of new shipments, growing from 178,613 units to 197,409 units in 2018. As for specific vendor performance, Xerox, Canon, and Konica Minolta all saw positive year over year growth in A3 color shipments in this speed segment.

These are just a few examples of growth sub-segments; beyond the shift to color and multifunctionality, we are observing a move to faster-speed devices (e.g., away from the 11-20 ppm speed segment) with superior feature sets that may or may not be part of a managed print services agreement. That said, there does seem to be an increasing need for devices that serve individuals that work or study from home; these may be more basic in functionality than printers designed for traditional office settings.

Blurring of technologies

Our annual review of hardware placements reinforces the notion that the race between laser and inkjet technology is really heating up. The strongest handful of vendors appear to be those that can offer both laser and inkjet technologies.

Currently laser appears to be winning the race for print volumes and high-volume installations in shared locations. Inkjet, however, appears to be more successful with placements into the lucrative SOHO and SMB environments via the online channel, as well as on low energy and low emissions.

Conclusion

While the overall office equipment markets in North America and Western Europe may be seeing decline, they still generate tens of millions of placements each year—representing tens of billions of U.S. dollars in sales. This market cannot be ignored; Keypoint Intelligence will continue to track the most lucrative segments as well as those with the greatest growth potential. With larger technology trends like artificial intelligence and virtual reality coming to the fore, it will be particular interesting to see how these intersect with office print technology in the years ahead. ■

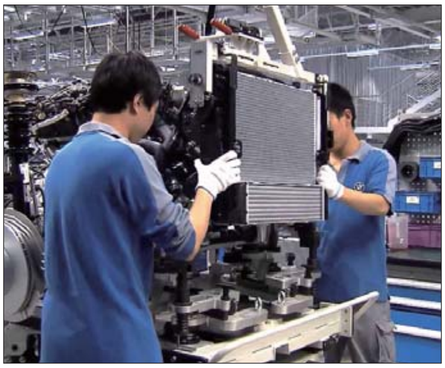
Meet Keypoint *John Shane* at the summit at RemaxWorld on October 17-19, 2019. *John Shane* will speak on Printer and Copier Devices: the Global Trends Impacting OEMs and the Aftermarket.

A New Start for Chinese Printing

Tequila Yan

When "Made in China" products started to spread across the world, people started to form impressions about this large "world factory." These three words, "Made in China" became a symbol of low price and low quality.

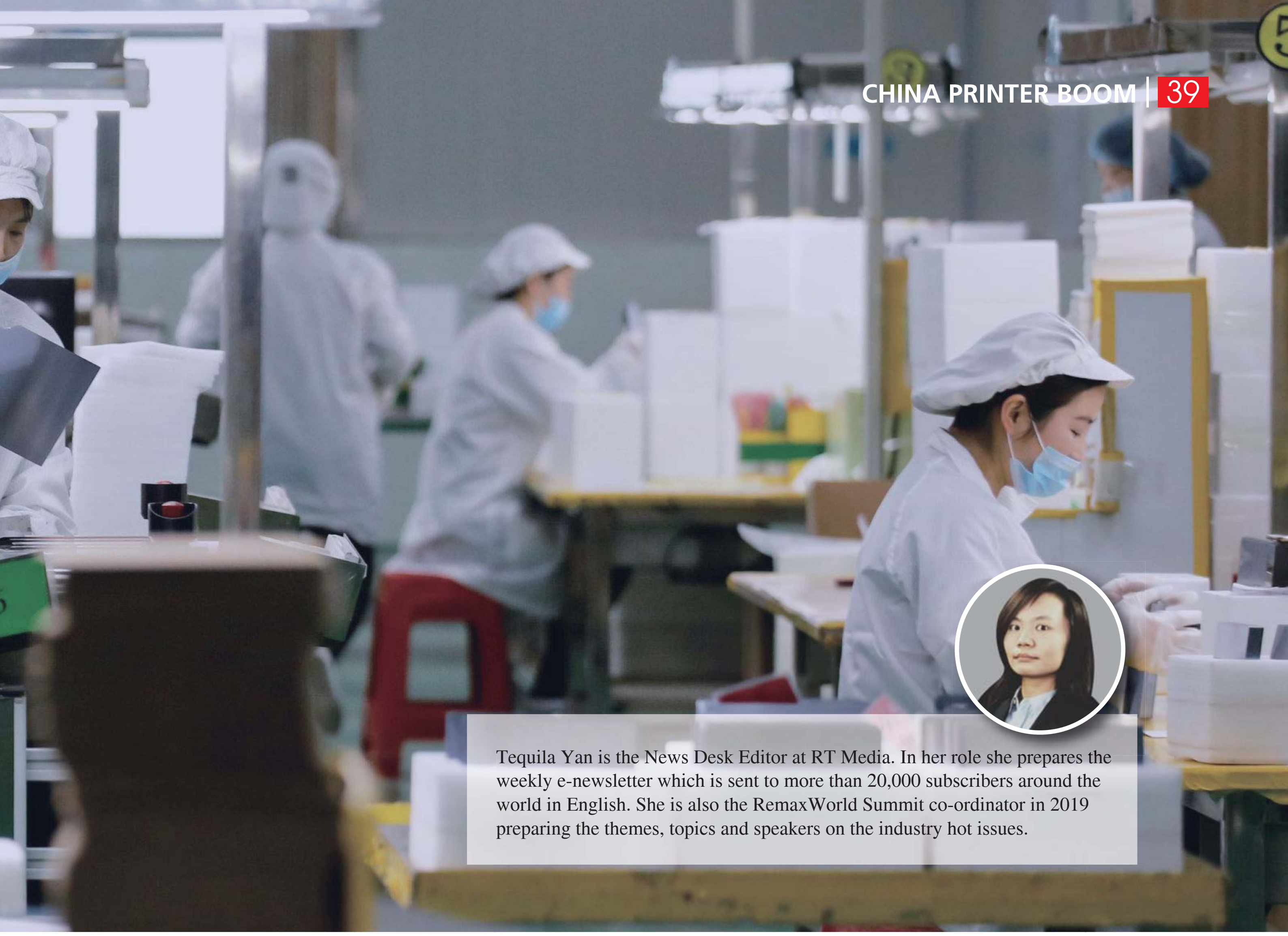
With the advent of super technologies such as the world's fastest trains, 5G and aerospace technologies, many today have developed a more positive attitude. I am not saying everyone in the world loves "Made in China"—there are still plenty of cheap, low-quality products to be found—but China-made goods are becoming identified with efficient manufacturing, high quality and reliability.



Dating back to the Tang Dynasty, woodblock printing became widely used. Somewhere between 1041 and 1048, a common worker named Bi Sheng invented movable type printing. From that time onwards, Chinese printing kept developing from dynasty to dynasty.

Printing is the forerunner of modern human civilization, creating conditions for the wide dissemination and exchange of knowledge. Look at the impact Gutenberg—the German blacksmith, goldsmith, inventor, printer, and publisher—had when he introduced printing to Europe with the printing press. It started the printing revolution and is regarded as a milestone of the second millennium, ushering in the modern period of human history. It played a key role in the development of the Renaissance, Reformation, the Age of Enlightenment, and the scientific revolution and laid the material basis for the modern knowledge-based economy and the spread of learning to the masses.

But long before Gutenberg ushered



Tequila Yan is the News Desk Editor at RT Media. In her role she prepares the weekly e-newsletter which is sent to more than 20,000 subscribers around the world in English. She is also the RemaxWorld Summit co-ordinator in 2019 preparing the themes, topics and speakers on the industry hot issues.

in the new era with printing, China was the "emperor of printing" passing the technology onto North Korea, Japan, Central Asia, West Asia and then Europe.

However, today, China is not what comes first to your mind when you think about modern printing or printers. Canon, Epson, HP, Brother, Xerox and Konica Minolta are Japanese and US brands. These dominate the printer world today and will probably continue their command in the near future. China lost its footing, its crown, its monarchy and lost its position in printing.

China cannot be ignored

According to IDC, in 2018, the total sales of laser printers in China alone were 8 million units. This means China has become the world's largest market. HP still dominates the marketplace, but other solutions are being developed too.

On December 6, 2010, Pantum released its first laser printer with independent intellectual property rights in the Great Hall of the People, at the western edge of Tiananmen Square in Beijing. Pantum is well known and highly regarded as being the first printer OEM in China. The previous edition of this magazine listed some additional printing devices that have since been developed. Actually, there are many more Chinese printer brands than we realized. Jiangxi-based Elean is another printer and copier manufacturer who has its own independent intellectual property. HGOA, with its military background, has also developed its own multi-function and security-enhanced copiers. Established in 1993, Cumtenn is the first manufacturer of receipt printers, bar code printers, thermal transfer printers and laser printers.

As for inkjet solutions, Jolimark owns its own self-independent intellectual property technology. The company has developed a red and black, two-color inkjet printer primarily for the printing of official documents by government, schools, offices and business.

In the dot-matrix printer market, there continue to be more than 3 million shipments per year. With the continual advancement of the Golden Tax Project, this segment could be considered as the most competitive printer market in China. Although foreign brands like Epson, Toshiba and OKI are still active, domestic brands like CITIC, Jolimark, Dascom, Lenovo and Deli are increasingly playing a more important role in the fields of tax, finance and logistics industries. Locally-made dot-matrix printers have become overwhelmingly used by government procurement and have many advantages when it comes to customer service.

During the past thirty years, there has been a steady development of domestically-made dot-matrix printers which possess quality, stability and price-competitiveness when compared with foreign brands.

The Boom for Chinese-made Printers

In 2016, the Chinese government issued the “People's Republic of China Network Security Law” requiring that by 2020, large companies should be using at least 80 percent of domestically-made products that can provide sufficient security. Driven by the need for digital information and a security strategy, most companies and institutions in China have started to replace their traditional office equipment with local products instead of the big global brands with which we are all familiar. It is expected a large proportion of domestic printers and printing consumables will replace the traditional brands in the future.

According to the centralized procurement data, domestic printers will increase four times in quantity and ten times in value compared with before. That means the market share for traditional OEMs has already started to decline and is expected to continue to decline. For this reason, in 2019, HP launched fourteen new A3 mufti-function printers, the smart tank series printer and a new series of color mufti-function printers. It is all because HP needs to protect its market share and to make sure it has the biggest slice of cake in this growing market.

According to an investigation by the Japanese-based research group, Chunichisha Co. Ltd., the total global sales of thermal printer cores was 61.75 million in 2018, of which Xiamen PRT Technology Co., Ltd. accounted for 24.9 percent, making it the “No.1 in global sales volume for thermal printer cores. This is the first time a Chinese brand has surpassed Japan in the global printer industry which has always been dominated by Japan.

Chinese manufacturers are also focusing upon printers for special use. These include UV flatbed printers, blueprint printers and label printers. At RemaxWorld Expo this year, Quyin and Puty will showcase their label printers and Yuqiaofu will bring its patented blueprint machine to the show. The blueprint printer supports simultaneous printing of blueprint and whiteprint but does not need any toner or inkjet cartridge because it uses hot-melt technology.

Photo printers are yet another market. Telco giant Huawei and Xiaomi have also entered this market to challenge the Japanese brands.

As more and more Chinese players enter the printer market, Chinese OEMs will grow and play an important role, not only in the domestic market, but also the global market.

2019 could become a memorial year because it marks a new start for China dominance in printing. Maybe it should be named the “First Year of the Chinese Printer.”

Chinese printer manufacturers

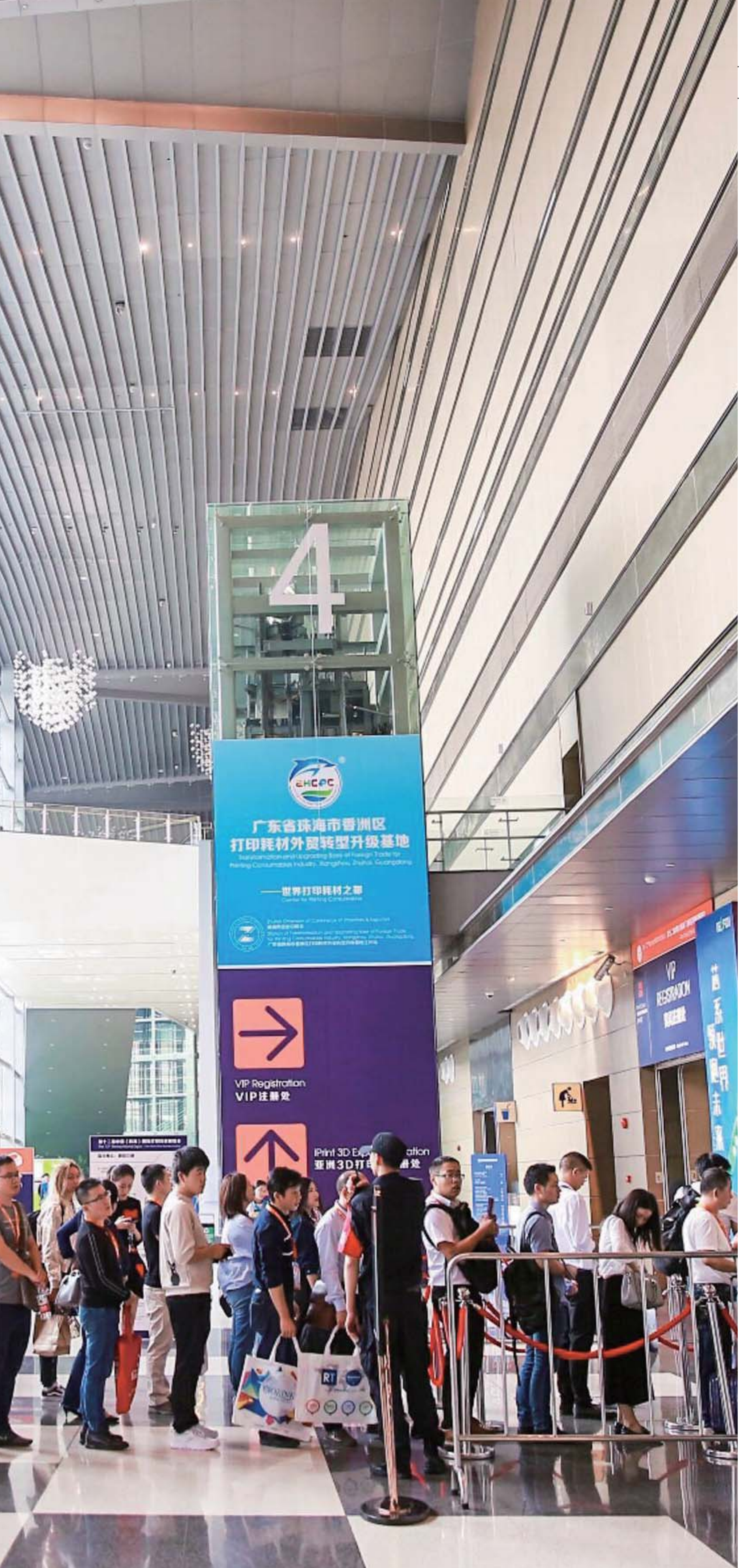
Company/Brand	Printer category	Website
Avision(Taiwan)*	laser printer	www.avision.com
Biaotop	dot-matrix printer, label printer, receipt printer	www.biaotop.com/
CITIC	dot-matrix printer, barcode printer, ID card printer, flat-push printer	www.szcatic.com
Comet	receipt printer	www.cometgroup.com
Cumtenn*	laser printer,flat-push printers, barcode printers	www.cumtenn.com
Dascom	dot-matrix printer, barcode printer, card printer, receipt printer	dascom.cn
Deli	laser printer	www.nbdeli.com
DLICAN*	UV flatbed printer	www.dlican.com
Elean	laser printer	www.elineprint.com
Foundertech	laser printer	www.foundertech.com
Gainscha	barcode printer, thermal printer, thermal transfer printer	www.gainscha.com
HGOA*	copier	www.hg-oa.com/anquan/
HPRT	laser printer, thermal printer	cn.hprt.com
Huqiu*	medical image printer	www.hu-q.com
ICSP*	laser printer	www.icsp.com.cn
Jiangxi Fufeng*	dot-matrix printer, barcode printer, receipt printer	www.jxfufeng.com
Jolimark	inkjet printer, dot-matrix printer, label printer, thermal printer	www.jolimark.com
Lenovo	laser printer	www.lenovoimage.com
Olicom*	dot-matrix printer, specialised multi-unction printer	www.olicom-group.com
Pantum*	laser printer	global.pantum.com/global
Postek	barcode printer	postek.com.cn
Puty*	handheld lable printer	www.szpushi.com
Qicolor*	laser printer,dot-matrix printer, thermal printer, card printer, label/barcode printers	www.qicolor.com
Quyin(Aimo)*	lable printer	www.qu-in.com
Sunking*	handheld inkjet printer	www.sunkingtech.com
Yuqiaofu*	blueprint printer	www.yuqiaofu.com

*companies that will showcase their printers at RemaxWorld 2019

Visiting the Expo: What new experiences you can expect

Jack Clifford

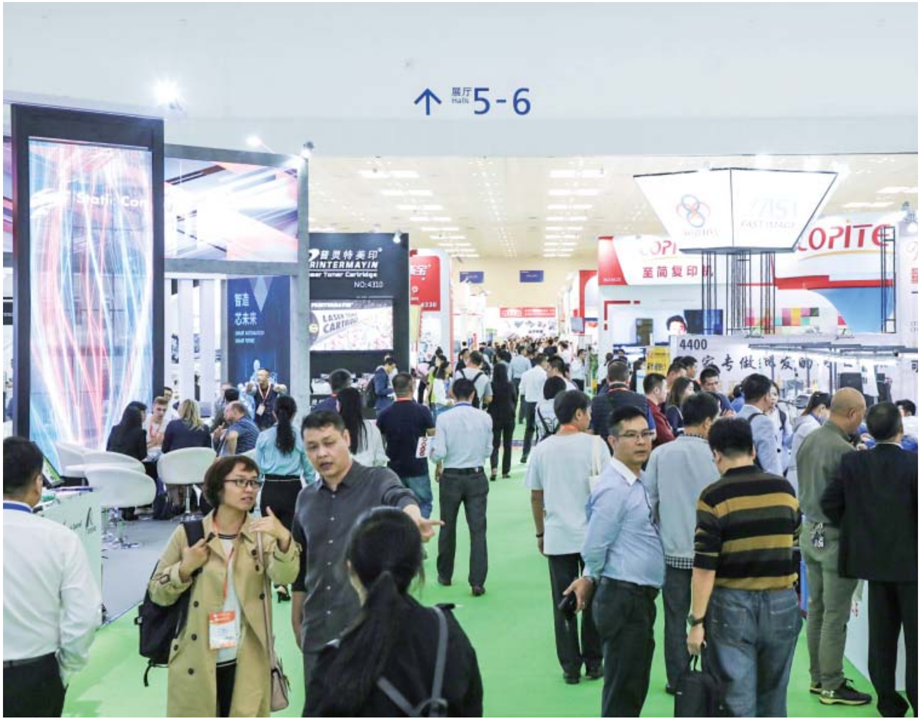
Jack Clifford is a visiting specialist from Manchester Metropolitan University in the UK and is assisting RT Media in its editorial and marketing departments.



The imaging supplies industry is quite different in 2019 compared to what it was when we launched our expo in 2007. In thirteen years, we have seen the lessening of demand for components, particularly as long-term relationships have become well established.

There has been a growing demand in the last five years for finished products by the visitors. Now, those same visitors, and the many thousands more that now attend since we began in 2007, are looking for added-value products—printers, copiers and office products—they can also sell to their existing customers.

So the expo has needed to evolve. And it has. There are still visitors looking for components and parts. Lots of them. There are visitors looking for finished products. Lots of them too. These visitors are also wanting handheld printers, label printers, thermal printers, UV and blueprint printers, 3D printers, dot matrix printers and alternatives to the standard inkjet and toner printers.



Some of the Chinese printer manufacturing companies at the Expo this year
Avision (Taiwan)
Cumtenn
DLICAN
HGOA
Huqiu
ICSP
Jiangxi Fufeng
Olicom
Pantum
Puty
Qicolour
Quyin (Aimo)
Sunking

And OEM printers too. They will all be there at RemaxWorld 2019 in Zhuhai, China.

Welcome to RemaxWorld Expo 2019

This year's expo is expected to be the biggest and best one yet. As in previous years, it will be held at the Zhuhai International Conventional & Exhibition Center. It promises to keep visitors occupied and will feature a tour of "China-made" hi-tech factories revealing the recent boom in Chinese core production and cutting edge technology development.

A number of printer manufacturers join the expo for the first time this year. Companies such as Avision, Pantum and PUTY will demonstrate their hardware and deliver presentation. Manufacturers, such as Cumtenn with its CT-255 printer featuring a 5-inch touch screen, will debut their new printers. It is expected to create a buzz among visitors looking for new business opportunities.

Last year's expo attracted more than 450 exhibitors and more than 14,000 visitors from 104 countries. Industry giants were there including Epson, Apex Microelectronics and UniNet.

This year the expo is the largest ever and the restaurants will be moved to provide the space needed. The 323,000 sqm of exhibition space will showcase a variety of imaging hardware, software, consumables, parts and components—only this year it will be bigger.

Visitors will be able to walk the show floor, get a feel for the current imaging and print industry climate and develop invaluable networks—essential for any business, especially when you are in China.

This "1-stop shop" is a unique experience where visitors can experience a wider range of products and solutions than ever before and also visit the factories nearby to see the products being made

Visiting High-tech "China-made" factories

There are more than 65 million people living in the Greater Bay Area (GBA) of China. This makes the GBA more populous than 180 other countries in the world. Only 22 countries are larger. The GBA includes key cities like Hong Kong, Macau, Shenzhen, Guangzhou, Zhuhai and Zhongshan. The GBA plays host to many high-tech manufacturing companies over a range of industries. One company, Gree, for example, is the world's largest air-conditioner and major appliance manufacturer. Such high-tech companies along with China's very fast train network and other infrastructure projects have become the envy of many other countries. Everyone knows what the president of the United States thinks about the advancement of China in this regard. Fourty years ago, China was a poor, developing nation way down the list of technologically advanced countries. In the last 20 years, it has overtaken giants like Germany, Japan, Russia, India and the United Kingdom to become the second strongest country in the world in terms of economy and technology.

Visitors will be able to visit some manufacturers, view their core production and talk in-depth with top management to better understand the culture and work ethic that has built this nation. A tailor-made industry trip has been created so visitors can learn the industry trends and new policies of the GBA, and if interested, coperate with these manufacturers to help benefit their own businesses.

There are two tours, each lasts four days starting on the afternoon of the last day of the expo on October 19. One trip allows for visits to five high-tech manufacturing companies in Zhuhai and Shenzhen:

1. BY-HEALTH (ZHUHAI)
2. Gree Electric Appliances Inc. of Zhuhai (ZHUHAI)
3. Chimelong Ocean Kingdom (ZHUHAI)
4. Han's Laser Technology Industry Group Co., Ltd (SHENZHEN)
5. Dajiang Innovations Technology Co., Ltd (SHENZHEN)

The other trip will include visits to printer manufacturers:

1. Pantum International Limited
2. Quyin (Aimo) Zhuhai
3. Jolimark
4. PUTY Technology Co, Ltd

The trip has been organised so that visitors will receive the best business opportunities all in one trip and experience the recent economic development of China. Visitors will get the true China experience too, with guided travel in the cities of the GBA area and get to travel on the new, high-speed railway.

China has become a large player in the development of technology, the value chains are global, and there is never a better time than now to visit China.

"China-made" advanced, quality, efficient, secure and non-infringing technologies

The political world in 2019 has made the future uncertain for technological market. The new round of September US-China tariff changes, means this generation has not witnessed such a tough struggle which even the U.S. president is calling a "war."

The industry continues to change. Take the emerging business relationship between Xerox Corporation and HP Inc, and the waning art of remanufacturing, which is being overtaken by the advent of new-build compatibles. Many business owners are saying they cannot afford to lobby governments to support remanufacturing when non-infringing, toxic-free, new build products can outlive remanufactured ones. The industry is shifting quickly.

Further, there's the shrinking number of OEMs, with the imaging division of the fifth largest OEM, Samsung, being taken over by the largest Global OEM HP (who are now working with Xerox and may merge in the future).

New technologies, from UV thermal printers to label printers

The globe continues to look to China at the opportunities for growth, in what is being called the "China Printer Boom". China-made products have come a long way. Technologically, China is now becoming the biggest country in terms of printer shipments and supplies, according to IDC Research. The boom has seen many printer OEMs appear from nowhere. And you can see them all at the Expo in October.

The likes of CITIC and Gainscha will join the expo for the first time, known for their dot-matrix, label printers and UV thermal printers. Suppliers like these may hold the key to what has been missing from your business.

The best place to see all this in action is at RemaxWorld Expo this October. We are already looking at 2020. Some say we need to have 20-20 vision to see clearly in order to survive. A visit to the expo will better equip you with a 20-20 vision.

The Trump Tariffs on Imaging Consumables

Merritt R. Blakeslee

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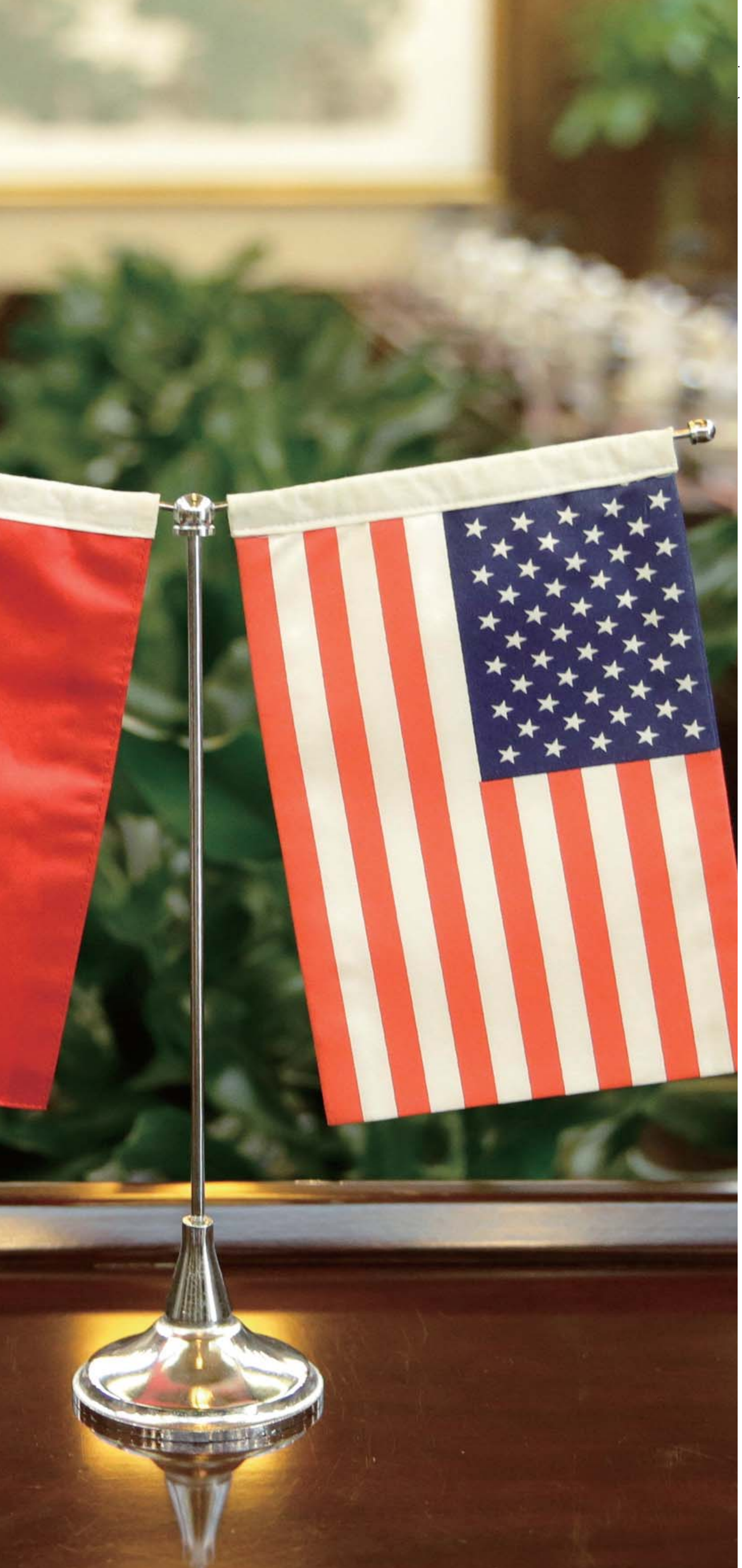
Merritt Blakeslee has practiced in the fields of international law and international trade regulation since 1991. His practice focuses on international trade and specifically on disputes lying at the intersection between international trade and intellectual property law. His principal practice areas include Section 337 investigations at the U.S. International Trade Commisson; Customs counseling, enforcement, and litigation; and anticounterfeiting and trademark protection. He has represented clients in thirteen Section 337 investigations, including investigations brought by Canon and Lexmark. He counsels clients on how to operate legally in the difficult legal environment of the printer consumables aftermarket. He has written and lectured extensively on this topic, particularly in Recycling Times and at imaging summits organized by RT Media.



For more than a year, the news about an end to the Sino-U.S. trade has fluctuated weekly, often daily, between optimism and pessimism, with a resolution one day imminent and the next remote. While tariffs are typically imposed to achieve trade-related policy objectives, President Trump's administration has been unusual in its aggressive use of tariffs to attempt to obtain concessions from the United States' trading partners on non-trade-related policy issues. These tariffs presently impose additional duties on all imaging consumables and components imported into the United States from China.

A.Section 301 Tariffs on China

The U.S.'s most aggressive use of tariffs to achieve non-trade objectives are the tariffs levied on goods from China in 2018 under Section 301 of the Trade Act of 1974 ("Section 301 tariffs"). In 2017, the USTR conducted an investigation of Chinese trade practices and concluded that China:

1) Steals U.S. intellectual property,

2) Forces the transfer of U.S. intellectual property to Chinese enterprises, and

3) Evades U.S. export controls to order to invest in strategic U.S. technology.

To compel China to change these practices, the United States opened a trade war by imposing successive rounds of tariffs on goods imported to the U.S. from China.

The following statistics help to put the magnitude of Sino-U.S. trade war in context. China is the largest export economy in the world, and the U.S. is China's largest export market. In 2016, China's exports to the U.S. represented 19% of all Chinese exports. In other words, U.S. tariffs that reduce the flow of Chinese exports have the potential to inflict significant economic harm on the Chinese manufacturers and exporters.

From a U.S. perspective, China is the U.S.'s largest supplier of goods imports, representing 21% of all U.S. imports. In addition, it is the U.S.'s third largest export market (after Canada and Mexico). In 2016, U.S. exports to China represented 9.2% of all U.S. exports. Thus, the Section 301 tariffs impose a significant economic penalty on U.S. consumers and industrial customers who purchase imported Chinese goods and an additional penalty on U.S. producers and exporters whose sales to China have been curtailed by the retaliatory tariffs that China has imposed.

The U.S. believes that it can win a trade war of attrition because its economy is stronger than China's. China believes it must

defend its trade policies and its increasing stature in the international trade economy and in geopolitics. While the trade war plays out, consumers and producers in both countries are suffering.

On March 22, 2018, the U.S. announced plans under Section 301 of the Trade Act of 1974 to:

1)impose additional 25% tariffs on $50 billion of Chinese imports,

2)initiate a WTO dispute against China challenging its allegedly discriminatory regulations in the licensing of technology from non-Chinese to Chinese firms, and

3)limit Chinese investments into the US.

The new tariffs pertain only to imports from China to the United States. However, they apply in addition to any normal duties, antidumping and countervailing duties, or other import charges on these Chinese products. At present, the United States has imposed four successive rounds of Section 301 tariffs, which, when completely implemented in December 2019, will cover virtually all products imported into the United States from China.

Round 1 tariffs ($34 billion): The first round of U.S. tariffs, which became effective July 6, 2018, targets $34 billion in Chinese imports. It imposes a 25% tariff on goods covered by 818 Harmonized Tariff Schedule ("HTS") subheadings.

Round 2 tariffs ($16 billion): The second round of Section 301 tariffs, which became effective August 23, 2018, targets an additional $16 billion in Chinese imports. It too imposes a 25% tariff rate and covers goods imported under an additional 279 HTS subheadings.

Round 3 tariffs ($200 billion): The third round of Section 301 tariffs, which became effective September 24, 2018, targets an additional $200 billion in Chinese imports at an initial tariff rate of 10 percent. On May 9, 2019, the duty rate was increased to 25 percent. The third round of tariffs cover goods imported under an additional 5,745 HTS subheadings.

Round 4 tariffs ($300 billion): On August 1, 2019, President Trump announced that the United States would impose a 10% tariff on $300 billion worth of Chinese-made products beginning on September 1st, and suggested that the tariff rate could later be raised to 25%. Extending the Section 301 tariffs to this additional $300 billion worth of goods will impose tariffs on virtually all goods from China that come into the United States.

On August 14th, the USTR, which administers the Section 301 tariffs, announced that a portion of the tariffs, most covering consumer items like laptops and smartphones, would be delayed until December 15th so as not to interfere with Christmas season buying in the United States. The tariffs delayed until December 15th cover about $189 billion in Chinese imports. Those that took effect on September 1st cover about $111 billion.

B.How the Section 301 Tariffs affect the importation of Chinese-origin ink and toner cartridges and components into the United States

Imaging consumables are covered by the Section 301 tariffs imposed on all four rounds. In the Harmonized Tariff Schedule, imaging consumables are covered by HTS 8443.99, which is divided into four main sections. Each of these sections covers both finished ink and toner cartridges and cartridge components:

- Parts and accessories of printers (8443.99.20 & 25)
- Parts and accessories of facsimile machines (8443.99.30 & 35)
- Parts and accessories of copying machines (8443.99.40 & 45)
- Other (i.e., parts and accessories of "universal," multi-function, or three-in-one machines) (8443.99.50).

In addition, circuit boards used in ink and toner cartridges are classified under HTS 8542.31.00.01

Here is how the Section 301 tariffs apply to each of these product categories:

1.Fax machine-only cartridges and components

An ink or toner cartridge can only be used in a fax machine is classified under HTS 8443.99.30. Components of such a cartridge are classified under HTS 8443.99.35. Such cartridges and components are subject to Round 3 of the Section 301 tariffs, which became effective September 24, 2018 at a duty rate of 10% ad valorem. The duty rate was increased to 25% ad valorem effective May 9, 2019.

2.Copying machine-only cartridges and components

An ink or toner cartridge that can only be used in a copying machine is classified under HTS 8443.99.40 and is subject to Round 2 of the Section 301 tariffs, which became effective August 23, 2018 at a duty rate of 25% ad valorem.

Components of a cartridge that can only be used in a copying machine are classified under HTS 8443.99.45 and are subject to Round 1 of the Section 301 tariffs, which became effective July 6, 2018 at a duty rate of 25% ad valorem.

3.Cartridges and components for multifunction printers

If the same ink or toner cartridge, or a component of such a cartridge, can be used in a 3-in-1 or multifunction printer that performs at least two functions from among printing, faxing, and copying (or if the cartridge or its component can be used in at least two of a printer, fax machine, and copier), it is classified under HTS 8443.99.50. Cartridges and components for multi-function printers are subject to Round 4 of the Section 301 tariffs, which became effective September 1, 2019 at a duty rate of 10% ad valorem.

4.Printer-only cartridges and components

An ink or toner cartridge that can only be used in a printer is classified under HTS 8443.99.20. In addition, components for a printer-only cartridge are classified under HTS 8443.99.20 if they fall within one of the following:

(c) Laser imaging assemblies, incorporating more than one of the following: photoreceptor belt or cylinder, toner receptacle unit, toner developing unit, charge/discharge units, cleaning unit;

(e) Ink jet marking assemblies, incorporating more than one of the following: thermal print head, ink dispensing unit, nozzle and reservoir unit, ink heater.

(See Additional Note 2 to HTS Chapter 84).

In other words, for a component of a printer-only cartridge to be classified under HTS 8443.99.20, it must constitute an "assembly" as described above. An individual component of a printer-only cartridge that is not an "assembly" is classified under HTS 8443.99.25. For example, a toner receptacle unit imported separately is classified under HTS 8443.99.25. If imported as part of a larger laser imaging assembly, on the other hand, it is classified under HTS 8443.99.20.

Printer-only cartridges and components that are classified under HTS 8443.99.20 are subject to Round 1 of the Section 301 tariffs, which became effective July 6, 2018 at a duty rate of 25% ad valorem.

Printer-only components that are classified under HTS 8443.99.25 are subject to Round 4 of the Section 301 tariffs, which became effective September 1, 2019 at a duty rate of 10% ad valorem.

5.Circuit boards for ink and toner cartridges

Circuit boards used in ink and toner cartridges are classified under HTS 8542.31.00.01 ("Electronic integrated circuits: Processors and controllers, whether or not combined with memories. . . ."). The HTS is clear that where an item could be classified under 8542 and another HTS item (i.e., one of the 8443 line items), "heading . . . 8542 shall take precedence over any other heading in the [the HTS]" (HTS Ch. 85, Note 9). Such circuit boards are subject to Round 1 of the Section 301 tariffs, which became effective July 6, 2018 at a duty rate of 25% ad valorem.

6.Recap of 301 Tariffs on Ink and Toner Cartridges

To summarize, all imaging consumables are subject to the Section 301 tariffs at a rate of 25% ad valorem except

- individual components for printer-only cartridges (not including circuit boards) and
- cartridges and cartridge components (not including circuit boards) for multifunction printers,

which are subject to the Section 301 tariffs at a rate of 10% ad valorem.

C.Exclusion requests

1.Deadlines

A company whose imports fall under the section 301 tariffs can request that a product it imports be "excluded" from the tariffs. If its exclusion request is granted, the excluded product, and all products like it, no matter who the producer or importer is, will be exempted from the 301 tariff on that product. The exclusion runs for a period of one year from the date on which it is granted. USTR has set no deadline for finishing ruling on the exclusion requests that have been submitted, but any granted request will be retroactive to the date on which that tariff was imposed.

The deadline for filing exclusion requests for Round 1 was October 9, 2018. The deadline for filing exclusion requests for Round 2 was December 18, 2018. The deadline for filing Round 3 exclusion requests is September 30, 2019. USTR has promised to announce procedures for requesting an exclusion from the Round 4 but as of the date of this writing (August 22, 2019) has not done so.

2.Exclusion requests filed by the OEMs

USTR has provisionally approved the exclusion requests of three large OEMs covering printer-only cartridges and/or assemblies. These requests are presently being evaluated by Customs & Border Protection for "administrability." If approved by CBP, they will be formally granted. The applicants include Canon U.S.A., Inc. (five requests), Konica Minolta Business Solutions U.S.A., Inc. (three requests), and Kyocera Document Solutions America Inc. (five requests). These submissions can be viewed on the https://www.regulations.gov website by entering docket number USTR-2018-0025 in the search field on the home page.

If granted, these exclusion requests apply not just to the applicant's products but to any product that fits the product description in the exclusion notice, regardless of the identity of the producer or importer. Because exclusion requests are granted on a product-specific basis, a third party that does not obtain its own exclusion may, according to USTR, "still benefit from a product exclusion if a similar product is granted an exclusion." In other words, it is possible that the importer of, for example, a remanufactured – or possibly even of a new-built compatible – Canon toner cartridge could benefit from any exclusion order that Canon eventually obtains.

Four companies that filed exclusion requests covering printer-only cartridges and/or assemblies had those requests denied: Epson America, Inc. (six requests), HP Inc. (seventeen requests), Xante Corporation (four requests), and Xerox Corporation (four requests). The Epson requests were denied by CBP on "administrability" grounds after having been preliminarily granted by USTR as having satisfied all the substantive criteria for an exclusion. Two companies that filed exclusion requests covering fax machine-only cartridges and/or components, Canon and Konica Minolta (one each), had those requests denied.

D.Mexican Tariffs

In late May, President Trump announced that the U.S. would impose broad tariffs on goods from Mexico unless Mexico agrees to do more to stop the flow of illegal immigrants into the United States. This was another dramatic use of tariffs to achieve a non-trade-related policy objective. The tariffs were to begin at 5% and to climb eventually to 25%. Within a matter of days, it was announced that the U.S. and Mexico had reached an agreement that eliminated the need for tariffs, at least for the time being. If tariffs on Mexico were to be imposed, that would seriously disrupt the business of U.S.-based cartridge producers and resellers who import cartridge components and finished cartridges from Mexico. ■

Disclaimer: This article is not intended to provide, and should not be relied on for legal advice on any particular set of fact. Anyone with a specific question about compliance with the Section 301 tariffs should consult a customs attorney or a customs broker.

IN MY VIEW

What are you looking for when you visit RemaxWorld?

UAE

Muhammad Ali Pasha
Director, Copier International Trading L.L.C

Thanks to the helpful RT team I am here to exhibit. For exhibitors, we are only here for a short time. The RT team has helped us with visa and hotel issues. I am very impressed. RemaxWorld Expo has exceeded our expectations in the past. We have met lots of potential customers here. We believe more orders will be placed this time too. We are very satisfied and we are looking forward to coming again this year.

Kazakhstan

Alexey Barelko

We like to come to RemaxWorld Expo to meet the many high-quality suppliers there. We will be exploring new products and new opportunities, so we will spend lots of time in the New Products Zone. We have many partners in China already, thanks to RemaxWorld Expo, so it's important for me to meet all my suppliers in the one place at the one time instead of having to travel around China: it saves me lots of time and money.

Poland

Maciej Sianos

This will be my first time to visit this show. I will be looking for a lot of new prospects. I know I can offer solutions to more international companies who will visit our booth. I expect this show will definitely bring us more new opportunities and customers.

What in the world IS going on?

Almost every foundation brick laid by the remanufacturing consumables industry since 1990 has been stripped away, bare. So much has changed and altered that what's left has become unrecognizable and even that seems to be crumbling before our very eyes.

Where have all the remanufacturers gone?

Sadly, in the USA and Europe, many have moved away from the industry because of declining margins and an outdated eco-friendly sales pitch. Cartridge collections and waste costs soar, parts and supplies prices are also up, choice of vendors decline as vendors go bust or just decide to stop manufacturing.

The Bill of Materials (BOMs), in order to fully construct a cartridge, change as survival mode kicks in, corners are cut, quality levels drop and only a few are strong enough to play the game and stay independent.

At a recent industry focus event I attended in Brussels, it became very clear that the strategy for European remanufacturers including Turbon, Armor, KMP and WTA, among others, is to lobby the European parliament to support remanufacturing. It could take a decade to push for changes to EU legislation, to develop guidelines and establish current rules that more favorably position remanufactured over new-built cartridges. I wish them luck, but I left shaking my head. In my view it must be all about profit and must be all about the here and now if there is any chance for the aftermarket to succeed. Many remanufacturers have become resellers, giving up the process of collecting or buying empty cartridges and replacing worn out parts and the toner. In order to retain the customer-base they have moved to a business model where they can buy and sell at increased margins with lower overhead and operational costs. Much of what is sold today is online. There is no opportunity

in the World Going On!

to sell the finer points of saving the planet from plastic bottles in our oceans. The environment is important. I get it. Unfortunately, the eco-friendly messages of the '90s have not changed and very few consumers want to listen. I am all for trying to make them listen, though because there are real environmental issues that need to be dealt with. You won't see me eating my fish and chips on a Friday-night, ingesting micro-sized particles of plastics that my cod has been nibbling on.

Business survival must be paramount and it has always been all about making a profit.

In 2017 the US-based remanufacturing giant, Clover Imaging Group (Clover), published a white paper about remanufacturing being the best and only legitimate aftermarket solution. It was a propaganda piece that disclosed more about Clover's fears than making any solid case that would change a reseller's attitude and approach to making a profit from printing consumables. Its impact was zero. OEMs' distributors, wholesalers have since moved business in search of lower costs and bigger profits, as recently commented by Bloomberg.

Recently, Bloomberg has published several reports about Clover's declining revenues and debt position. We also see OEMs distancing themselves from Clover after it launched its Silver Bullet Program to incentivize resellers to replace HP original cartridges with a remanufactured HP cartridge from Clover.

Clover has also largely controlled the availability and price of empty cartridges for remanufacturing. What appeared at first to be a clever move to capture the used cores market may have been the very strategy that has come back to bite them. Clover's management of empty cartridges allowed them to control the availability and the price of empties. As a result of price hiking, it most likely ignited the frenzy of new-built cartridge manufacturing in China which now

IN MY VIEW

What are you looking for when you visit RemaxWorld?

Korea

James Yu
Manager at RITCOM CO. LTD.

The patent issue is becoming more important. So, I think a lot of toner companies that don't have patent solutions of their own must leave key markets where OEM patents are registered. Of course, the very cheap cartridge producers will continue in markets where patents are not a problem.

I also heard HP will launch a small printer line up soon so also want to get that information because the Samsung MLT-D115L has been the main toner in Korea and now it's time to change. The Korean label tape market is getting bigger but that margins are low, so I need to research that too.

USA

Alan Kronstat

The show is certainly the industry highlight of the year. Each year it grows bigger than before and I really do not think it can turn out any better than it does. Being a business show, there will be many looking for new revenue opportunities, new business ideas and new directions to follow. So I will be looking as well for more vendors and different products from related industry sectors. This is the place to meet people from different parts of the

World. The important ones are all here. It saves me having to travel to different locations. I plan to meet people from South America and as far away as Russia. Take it from someone who's been doing these shows for 24 years now, I'm expecting it to be the best organized show again I have ever attended.

dominates markets around the world. The Chinese retaliated by “dumping cheap, patent infringing” imaging supplies into traditional remanufacturing markets. Of course, not all Chinese-made products are like this.

OEMs have changed their business model more times than I can recall. Now it’s all about contracts. An OEM now approaches an end-user, takes all the imaging devices in the end-user’s business under a contract and saves that end-user a lot of money. In turn, the OEM makes money on locking up the consumables for 5 years with a 97% retention rate at the end of the term. Those machines that already belong to the OEM under their brand are of course no problem. The other devices under the contract, however, need supplies and so the OEM looks to the aftermarket as a vendor source. The OEM with the most contracts wins the game.

Xerox has split in two. So has HP. Xerox shareholders stopped the planned sale to Fuji Film for around US$6.3 billion because they thought it wasn’t enough. Now it is all about shareholders return and perhaps it should have always been. HP has now announced a much closer working relationship with Xerox, which in turn will supply HP with technologies and polymerized toners. HP bought Samsung’s imaging division in 2016 for $1.1 billion. Canon must be wondering what the future holds for their coveted relationship with HP. HP has a vision and are in the driving seat.

Lexmark and Pantum are owned by the Ninestar group, which also owns Static Control and Apex Microelectronics, G&G and a network of resellers and other companies influential to the cartridge technology. Static Control changed course in 2016-17 and now focuses on selling finished products. Consequently, more remanufacturers have turned into resellers as a result.

Hubei Dinglong suspended its polymerized toner production lines suddenly over alleged non-compliance issues with local government. Their response is to tell everyone there is plenty of stock, so it won’t be a problem. I hope they are right as there is a very small choice for chemical toner vendors.

New-Built Cartridges (NBCs) from China continue to flood the main markets as resellers throw caution to the wind and enjoy the lower pricing. Quality at that price is good enough apparently, but most are patent infringing and pose a great risk to resellers, who for the most part don’t seem to care about being sued — until they are sued! Getting sued is a long, painful business and very costly, even if you win. Lawsuits are distracting and stressful, with money, jobs, businesses and sometimes houses, on the line.

Patent Safe Compatibles (PSCs) are not the same as NBCs. They are still new-built but they are also patent safe—they do not infringe the patents of the OEMs. There is no high-cost empty cartridge in the BOM, no freight back and forth and they are available all the time. Many vendors will tell you their cartridges are “patent safe” and most are willing to give you a piece of paper that says so.

So how do you know who to trust? There are two ways you can tell:

1.Look at the cartridge. If it’s exactly the same as the OEM it’s an NBC clone that probably infringes. If it’s different than the OEM but performs the same, then it’s probably a PSC. The new design is for a reason: to circumvent OEM patents and not infringe.

2.Investment. Anyone capable of

making PSCs has to invest in talented people: in-house patent lawyers, design engineers and to provide an infrastructure capable of using the talent in all product development projects from start up.

Those championing the case for remanufacturing as being the safest option tend not to differentiate between NBCs and PSCs as it weakens their entire argument. The truth is not all products made in China are clones, infringing, poor quality, and risky.

Despite PSCs being legitimate and patent safe, another truth is NBCs are replacing remanufactured products in big numbers. Amazon must be fed up having to take down all these products that infringe.

More or Less

What's next? It's safe to say there will be more lawsuits, more companies going bust, more consolidation of companies reducing choice, more parts vendors disappearing and more remanufacturers becoming resellers to end-users. There will be more contracts with end-users and more OEM cooperation with the aftermarket meaning there will be less transactional business and less empty cartridge collections.

Despite all the changes, threats and weak business models, the aftermarket has a chance to grow beyond the 25% market share it has now—and that's exciting. I predict PSCs will win the day with high quality, endless availability, patent-safe confidence and at better pricing than the reman equivalent.

OEMs are spending billions on print technologies and market positioning. The paperless society is still nowhere to be seen. There are no new imaging technologies remotely close that will affect the aftermarket in what is still an US$80 billion industry. What in the world IS going on? Progress. You cannot stop progress. Good for some, bad for others, but always an opportunity.

Weedon is an award winning CEO who has held senior management positions at various OEMs as well as Katun Corp and Static Control Components. He was the original founder of The Recycler Magazine and of trade shows in Europe. He also established Static Control's Worldwide Subsidiaries and relocated to the US to become executive vice president. Steve headed up the global Cartridge World network after it was acquired in 2016.
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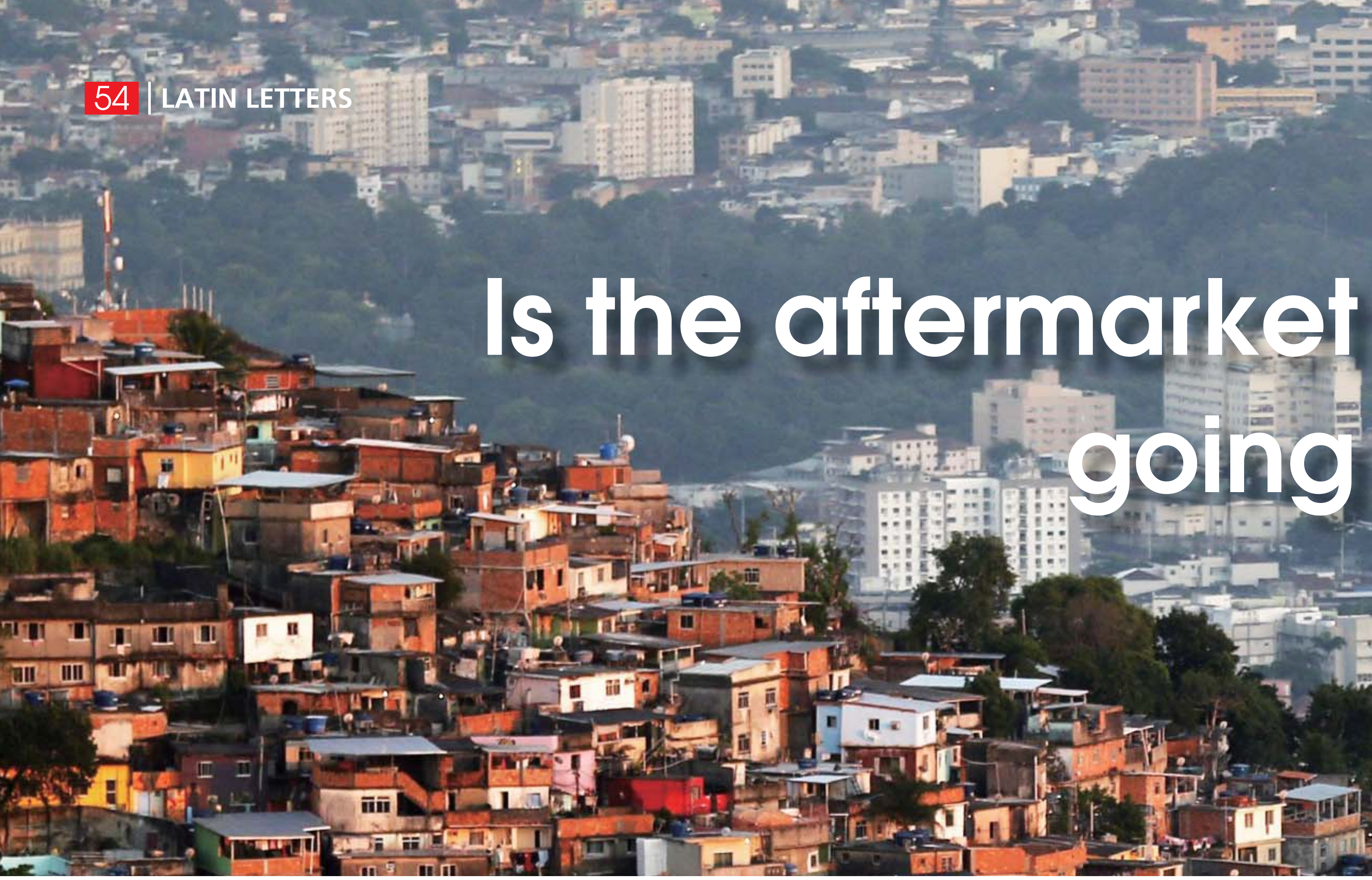

Is the aftermarket going

If there is anything I have learned from this industry, it is that you usually have the feeling that there were better times in the past. I remember with nostalgia how much you needed to pay for a kilo of toner, the surprising benefit behind the sale of a particular cartridge model or the number of pages that were printed at each job.

There is talk of a crisis, although I don't think it's the best word to define our current affairs. We have been going through the most disruptive era in the history of the industry for this past decade, where a constant transformation occurred—and continues to occur. The growth of the digital world has been changing everything, including our market, where it was gradually displacing the need for paper use. And although there is no end in sight or on the horizon, it is logical to predict that this transformation will continue to occur in the future.

Are cartridges imports growing or falling?

Of the three basic components of the distribution of printing supplies (original, remanufactured and NBC), it is the remanufacturing sector which faces the greatest difficulties. Throughout the region, the price and convenience of supplanting a production plant with a container have been decisive factors. Today it is very difficult to think that this process will be reversed in the future. Imports of inputs (toner, inks, cylinders) reveal a decline throughout Latin America. Little by little, remanufacturing would seem to become a niche business, being profitable in those lines where production costs are even more profitable than the finished cartridge or where the shortage of gaps makes it the only alternative.

To the contrary, in almost all Latin countries, the import volumes of new-build cartridges (NBC) have been increasing year by year, capturing the remanufactured cartridge market share and even some of the OEMs' share. For example, Argentina in 2018 increased the revenue of new-build toner cartridges by 20 percent, exceeding 60 percent of the market share if the number of units sold in the year is taken as a reference. On the other hand, the number of remanufactured cartridges in 2018 compared to 2017 fell by a little more than 20 percent. And this trend is expected to continue.

So, if the number of compatible cartridges sold shows signs of growth, why is there a sense of crisis in the Latin industry?

If we look at the imports of compatible cartridges in terms of their import value and not in terms of their quantity, we will detect a general drop in the average value per unit. Following the example of Argentina, the average price per unit of the imported toner cartridge has been registering a year-on-year decline of almost 15 percent between 2015 and 2018. If we made an analysis of the massive sales models, we will surely find that the fall is much greater.

In other words, although the number of compatible cartridges is increasing, its value per unit is decreasing due to the price pressure of each market,

in Latin America through a crisis?

Gustavo Molinatti

Gustavo Molinatti holds a degree in architecture from the University of Buenos Aires, Argentina. As publisher of Guía del Reciclador—a Spanish language trade magazine first published in 2002 for the Latin American printer cartridge aftermarket—he has organized more the 20 technical and MPS training events in several countries including Brazil, Argentina, Colombia, Venezuela, Chile & Perú. For more information please contact info@guiadelreciclador.com or visit www.blogdeldelreciclador.com

causing lower profitability and forcing the distributor to increase the volume of sales to complement that fall.

In search of new suppliers

This decrease in prices per cartridge is not free for the market, which begins to receive products of lower quality and lower yield, which are in line with this low cost.

In talking with several distributors from different countries, I discover that many were—or are—dissatisfied with their current suppliers and have had to look for new alternatives because they do not find consistency in each shipment they receive. They are aware that a quality of premium compatible cartridges will increase their cost and decrease their profit, but they understand that quality begins to be a decisive factor in maintaining their customers. Does this story sound familiar to you?

Another factor that adds to this scenario is that of the huge community of small and medium-sized companies throughout Latin America. Many do not have the volume of annual purchases sufficiently large enough to import from China. That puts great pressure on local importers to receive quality products at a very low price and with good credit conditions. Some venture to try to import directly to improve their profit margins, but in general, they end up resorting again to the local importer to simplify the buying process.

The Chinese manufacturers' phones are ringing

The importers and distributors in the Latin aftermarket know about the pressure that Chinese NBC manufacturers have to increase sales volumes, but they must understand that price puts limits on quality. You need to work to find alliances with manufacturers that are committed to the quality of the products and willing to generate a consistent and long-term business relationship.

For the manufacturers, the good news is that the Latin region continues to be a vast market with great growth opportunities and all forecasts indicate that these favorable factors will continue. Those who want to increase their business in the region should realize that it is essential to establish closer commercial relationships. Price is key, but so is the knowledge of a very complex market.

The business opportunity is more present today than ever, especially when there are commercial meeting spaces such as the one proposed by the RemaxWorld Expo or the RT Imaging events of the Americas. It is the opportunity to talk face to face, expose the needs of each and seek to build strong and lasting partnerships. ■

The Summit in Chicago

Int'l ITC Meeting Brings Biggest U.S. Remanufacturers Together

Tricia Judge

Members of the International Imaging Technology Council (Int'l ITC) gathered together for a strategic planning meeting on July 31 in Wheeling, Illinois. The meeting was attended by 20 people representing 13 of the most well-known remanufacturers and imaging supplies dealers in the U.S.

The meeting was lively, as everyone shared openly and thoughtfully. It was held to review the status of the industry, its trade association and its plans for the future. The members then reviewed the competitive problems of Chinese new-built cartridges, OEM chip shutdowns and more. On these issues, business owners, shared opinions, sometimes loudly, and opinions, always thoughtfully.

Threats

The industry's number one threat still comes from the OEMs. One, in particular, has stepped up its competitive tactics: HP.

HP, heralded by the aftermarket during the late 1990s and early 2000s for its non-interference with legitimate remanufacturing, has a new generation of aggressive managers and engineers at the helm. They want their supplies business back, as their deeply-discounted "white box" program pricing indicates.

HP has used chips in its cartridges for decades, but their earlier applications didn't lock out competition. They provided a variety of information to the consumer that he appreciated, gauges for toner levels, information on page count, etc. Aftermarket replacement chips didn't provide this information, and the cartridges they were affixed to were seen as less valuable because of the diminution in function. This gave HP a competitive edge but did not keep other brand cartridges from functioning.

These early chips were overcome when smart aftermarket companies developed replacement chips that disabled the "kill" feature and allowed for reuse. The market for aftermarket chips became robust.

Then the OEMs added a new tool to its competitive arsenal: firmware. By downloading from the OEM what is supposed to be an "upgrade," consumers became complicit in changing legitimate chips into killer chips.

HP's firmware is unlike any other that has come before it. It is either a time bomb, waiting until the printer is in service for a time. Or it automatically changes the firmware so it disables all aftermarket chips. Either way, it is insidious, as the competitive cartridge works for a while, but then is disabled. And the firmware affects a host of popular printers.

And once the firmware update is done, it can't be undone. There is no way to uninstall this firmware. The Int'l ITC is making this issue its top priority and is actively looking for dealers, and their customers, affected by the problem.

The group seemed to feel that the Chinese new-built cartridges pose a serious competitive issue, but not for the reasons many might assume. The cartridges have certainly created a mess in the low-end, Internet-sensitive marketplace, but several members have found ways to incorporate the new-built cartridges into their product offerings.

Legal Matters

Patents are the chief concern among members when it comes to Asian cartridges. Epson has always enthusiastically pursued infringers. Canon was slow to take action but has recently started to bring actions before the U.S. International Trade Commission (USITC) based on a few of its patents, albeit rather obscure ones. Canon has a huge portfolio of patents, so more actions are anticipated.

In August, Brother, who has also notably absent when it comes to defending its intellectual property rights, filed a complaint with the USITC against 32 companies and individuals that have allegedly infringed its patents.

New cartridges don't have the protection afforded remanufactured cartridges, thanks to the right to repair. Therefore, new cartridges need to be carefully vetted for intellectual property concerns. That's a tall order, as communication with the Asian manufacturers is hard enough.

A Busy Association

Int'l ITC has its work cut out for it in these trying times. The Standardized Test Methods Committee (STMC) and Int'l ITC committees could certainly use some fresh blood, and the members committed to bringing their top talent to these bodies. This year's Int'l ITC plans also include new communications vehicles, like an updated website and newsletter.

After four hours of discussion, and after reviewing other issues of concern to the business owners, the group unanimously agreed on one matter: that another meeting of the Int'l ITC would be held...and soon.

Don't miss out on the next Int'l ITC meeting or on any of the benefits it offers. Join today! Not a member? Let your membership lapse? Join today and get your membership for the remainder of 2019 and 2020. Go to www.i-itc.org. ■

Judge has served as the executive director of the International Imaging Technology Council, a not-for-profit trade association serving imaging supplies remanufacturers and dealers, for 17 years. Judge was the executive editor of Recharger magazine. A lawyer for 30 years, Judge also has litigation experience. Judge's work has been published in Recharger magazine, and several other industry magazines, and has won critical acclaim for her writing and industry advocacy. She has assisted in the preparation of six friend of-the-court briefs. Judge has presented the position of the industry to the International Trade Commission. She can be contacted by email at tricia@i-itc.org

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5 QUESTIONS

Starink Tim Yuan shares new solutions he will bring to RemaxWorld

How is the demand for ink cartridges and which global regions have the highest demands?

IDC data reveals there is a global demand for 750 million ink cartridges annually, of which 63 percent are original cartridges and 37 percent are non-original cartridges. The demand for original cartridges is declining by 20 million each year. However, we believe the inkjet cartridge business is still worthwhile for the following reasons:

1. inkjet printers still occupy big market share especially in Japan, Western Europe and the USA;
2. many other suppliers pay less attention to inkjet, which leaves a great opportunity for those still investing in it. Less competition often leads to better margins for both manufacturers and distributors;

Our company has used these factors to our advantage in the development, production, quality and sales of inkjet cartridges.

What is your view about the battle for market share between inkjet and laser/toner technologies?

As I mentioned, both official and our own sales data reveals the overall market share of inkjet cartridges is indeed being captured by toner cartridges. At the same time, we also see inkjet printer OEMs are finding ways to win back market share with their bulk inks, pricing strategies and the launch of commercial inkjet printers.

We will continue to focus on the research and development, production, sales of both inkjet and toner so we can provide customers with quality products and good service.

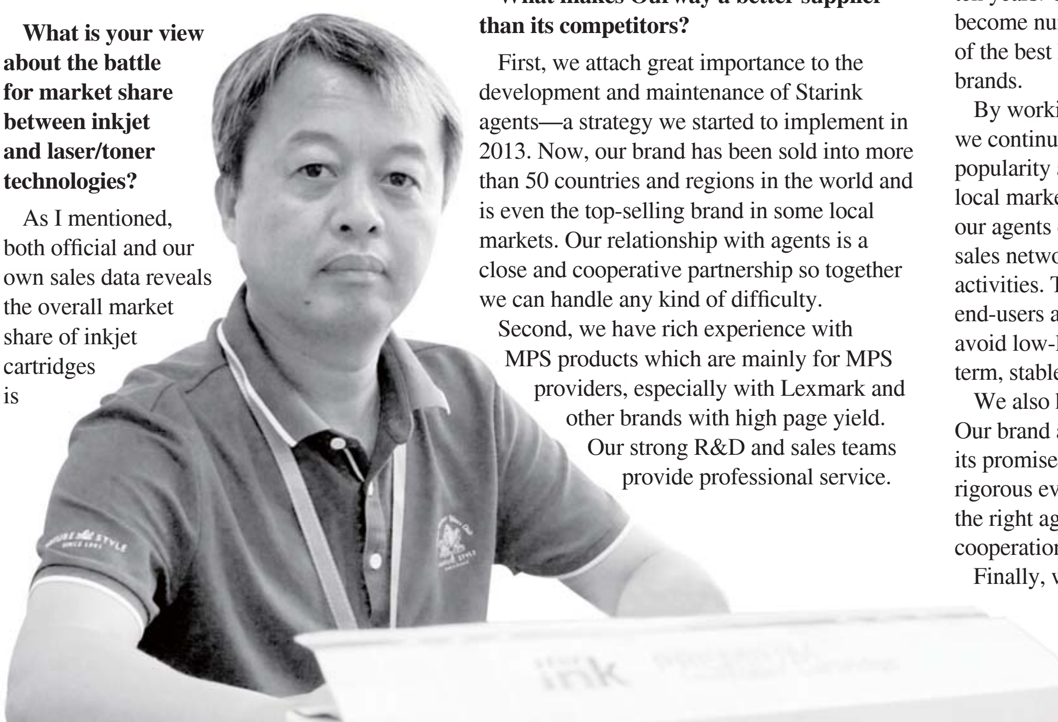
How long has Ourway been in business and what global regions are you focusing upon?

Ourway was established in 2005 and focuses upon toner and inkjet cartridges, and refill ink. We are one of the top 10 suppliers with a monthly capacity of one million toner cartridges and five million inkjet cartridges. Our sales are mainly in Europe, South America, Japan, and some Asian and African countries.

What makes Ourway a better supplier than its competitors?

First, we attach great importance to the development and maintenance of Starink agents—a strategy we started to implement in 2013. Now, our brand has been sold into more than 50 countries and regions in the world and is even the top-selling brand in some local markets. Our relationship with agents is a close and cooperative partnership so together we can handle any kind of difficulty.

Second, we have rich experience with MPS products which are mainly for MPS providers, especially with Lexmark and other brands with high page yield. Our strong R&D and sales teams provide professional service.



Tim Yuan, General Manager of Zhongshan Kingway Image Tech Co. Ltd.—the factory producing Starink for Ourway. Booth 1300 at RemaxWorld Expo. Email: terry@ourwayink.com.

What are the key features of your new Starink brand service and solutions?

Starink has made a lot of effort into product differentiation. The Starink brand is linked to an industry-leading factory, not just a logo or packaging box. Quality products are the foundation:

1. Starink is one of the top three compatible ink cartridge suppliers in the industry;
2. we have rich experience in providing MPS providers with high-quality products; and
3. in order to improve quality, stability and production efficiency, Starink has invested heavily in automated production lines to produce 80 percent of its ink cartridge products and 30 percent of its toner cartridges.

We have always focused on the development, production and promotion of ink cartridges, ink and toner and are committed to the printer consumables industry for the next ten years. Our ambition is to build Starink to become number two in the industry with one of the best known, popular and trusted generic brands.

By working closely with our agent partners, we continuously establish, and improve the popularity and reputation of Starink in their local markets. We actively support and help our agents develop and consolidate their sales networks and conduct sales promotion activities. This cultivates the loyalty of the end-users and sales channels and helps to avoid low-level price wars leading to long-term, stable growth.

We also have a good record of integrity. Our brand agents expect the factory to keep its promises and protect their interests. Our rigorous evaluation program helps us to select the right agent and then concentrate on mutual cooperation to develop the market together.

Finally, we constantly develop our own patented products, and provide back-up support from our professional team of lawyers so that our agents can have confidence in analyzing any situation and solving problems. ■

David Gibbons

Where were you in 2019?

You probably think what's the big deal? I'm here, reading the magazine. Reading this article. Don't turn the page yet. I suggest 2019 will go down in the history books as being as iconic for the printing and consumables industry as George Orwell's '1984.'

I have been overwhelmed with emails from those of you in the marketplace. "It's a war out here," as one writer put it. Another said, "This industry has gone crazy. It's never been like this before."

Indeed, we are witnessing changes in this industry not seen before. Changes that are tough and changes that are also good, if that can be believed.

But why 2019?

This is the year that the two largest US-based remanufacturers came under attack.

Clover's declining revenues and debt position took a backstage when company representatives took the edge off a recent Int't ITC meeting in Chicago saying the remanufacturers together under the Clover banner.

LMI has filed for receivership because it's financial partner, who only joined them 12 months ago, has been urged by their bank to quit the printing consumables industry. According to their receivership filing, the June 2019 business relationship between Xerox Corporation and HP Inc has lost them their single largest customer.

Also, in the U.S., as of September 1, we have the tariffs being charged on all printers and consumables coming out of China heading for that market. Some are cheering others are weeping. In any case, it has become a part of the 2019 year of the divide.

Then, Brother, who has been reasonably quiet when it comes to defending its intellectual property rights, has issued a complaint with the US International Trade Commission over 32 companies and individuals that have allegedly infringed its IP rights. Brother joined Canon and Epson in 2019 to fiercely fight with the aftermarket.

There are, this year, legal cases being fought in Europe and China as well as the USA as OEMs fight for their market share and their own survival in the face of shareholders. Even the small market of my homeland Australia is seeing a battle between OEM Epson Seiko and aftermarket Calidad. Australia has 100-year-old "hand-me-down" laws from Britain that do not recognize the "right to repair" doctrine. The court ruled the remanufactured cartridges being sold by Calidad were not worn or broken. Rather, they had just reached the end of their useful life as a consequence of their intended use. Calidad now wants to appeal the matter at the High Court. Australia is not the only country to have antiquated laws when it comes to the ownership of patents and an aftermarket loss in Australia could have a ripple effect across the Commonwealth.

A couple of months ago, in an industry forum in Brussels, the case for remanufacturing being the preferred business model was proposed to the industry. Again, I had people walk out of those meetings only to tell me that it's just crazy. Remanufacturing in 2019 is diminishing in favor of new-build compatibles. Their businesses just don't have the time to lobby for parliamentary support for remanufactured products. It could take years. So, 2019 has become a decisive year for many businesses who find the remanufacturing business model unsustainable for them. While remanufacturing is by far the better environmental business model, they tell me, it is simply not practical or as cost-effective.

I have travelled through Africa, Europe, Asia, and Latin America this year and the comments have all been the same. Industry players are looking for a quality product but at a better price than what remanufacturing can offer.

The number of OEMs is getting fewer as well. The only way the likes of HP can continue to grow in a flat market is to acquire others. Samsung's printing division has been gobbled up by HP along with all their patents. HP is now working strategically with Xerox in the U.S. and no-one will be surprised if HP-Xerox will merge into a super-entity in the near future.

Then there has been the toxic decaBDE chemicals found in new-built compatibles. The European Union has laws that prevent such nasties from being sold there, and now the U.S.'s Environmental Protection Agency is looking at putting bans into place there too in the interests of public safety. Russia has set up its own testing labs and standards to make sure the cheap, poor quality and toxic products don't get dumped there either.

But it's not all doom and gloom. Where there are war and strife there is also opportunity. There is a boom going on in China which has now become the biggest country in terms of printer shipments and supplies, according to IDC research.

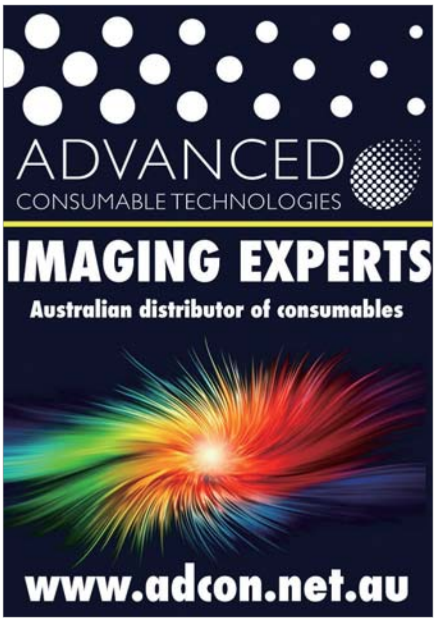
The boom has seen scores of printer OEMs appear from almost nowhere with specialty printers, label printers, UV thermal printers, braille printers, dot matrix printers as well as the inkjet and toner printers. There's a huge opportunity for businesses in every country to get hold of these devices and add them to your business model for your existing customers. You should visit the RemaxWorld Expo this October to see them for yourself.

Where were you in 2019? It will become a landmark year where business models for all are being tested and new opportunities must be found to survive and prosper for OEMs and the aftermarket alike. ■

Meet *David Gibbons* at the summit at RemaxWorld on October 17-19, 2019.

David Gibbons is the publisher of this magazine and is a Director of RT Media Ltd. You can watch Gibbons share this message on InTouch TV.

Recharger Marketplace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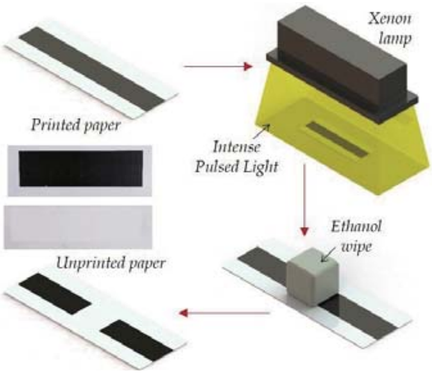


Imagine having an "unprint" button on your printer that allows you to reuse the same page again. Scientists are now able to remove toner with pulses of intense xenon light with a new"unprinting" function that can help save paper costs while recycling the paper.

Source
https://www.sciencedaily.com/releases/2019/06/190626160310.htm

TECH·ZONE

Remanufacturing the Lexmark CS517 Toner cartridges

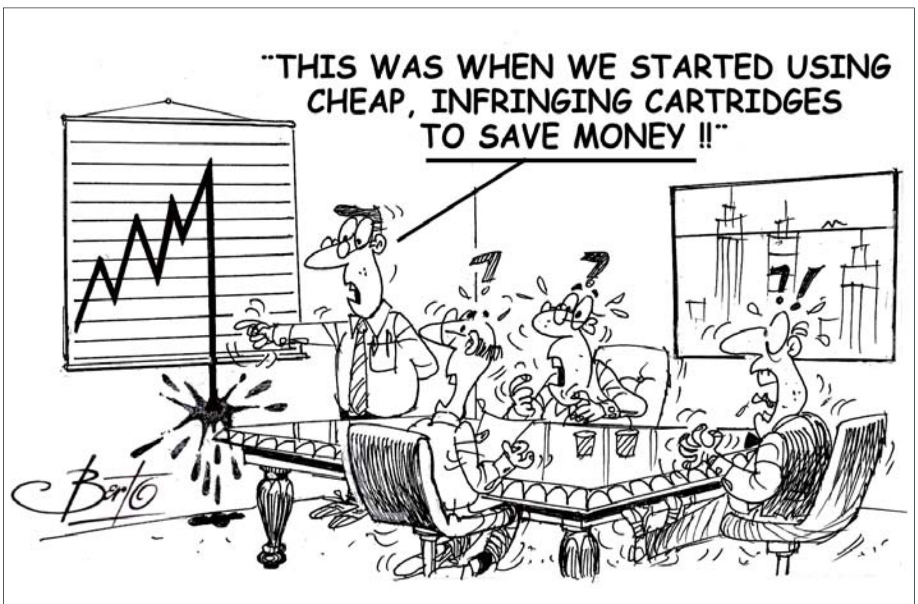
RT's Cartridge Library

IMAGING SHARE PRICES

(As at 5, March, 2019)

OEM	Prices: Last Month	Prices: This Month	Aftermarket	Prices: Last Month	Prices: This Month
Brother Industry (Yen) (6448:Tokyo)	1945	1839	Ninestar (RMB) (002180:Shenzhen)	24.16	24.67
Canon Inc. (US$) (7751:NY)	27.5	25.87	Hubei Dinglong (RMB) (300054:Shenzhen)	8.59	9.85
Seiko Epson (Yen) (6724: TYO)	1610	1414	Suzhou SGT (RMB) (002808:Shenzhen)	8.52	9.64
HP Inc. (US$) (NYSE: HPQ)	21.54	18.09	(Sources: Google Finance and bloomberg.com)		

BERTO'S LAST LAUGH



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