

## 2008 Document Scanning Market Analysis Report

### Excerpt for Channel Pro Magazine

#### Analysis of the N. American Document Scanner Market

For most vendors, the US market holds the largest opportunity for selling document class scanners, representing over half of worldwide shipments. More than 500,000 units were shipped here last year, and that number is expected to double by 2012. Not surprisingly, the three segments at the low end of the market boast the largest shipment volumes (see Figure 1.) In fact, 94 percent of all document scanners shipped last year were non-production class devices. These scanners are reaching into small office/home office (SO/HO) environments and the general office, as well as distributed corporate imaging installations. Non-production segments will remain the dominant categories for shipments in the years to come.

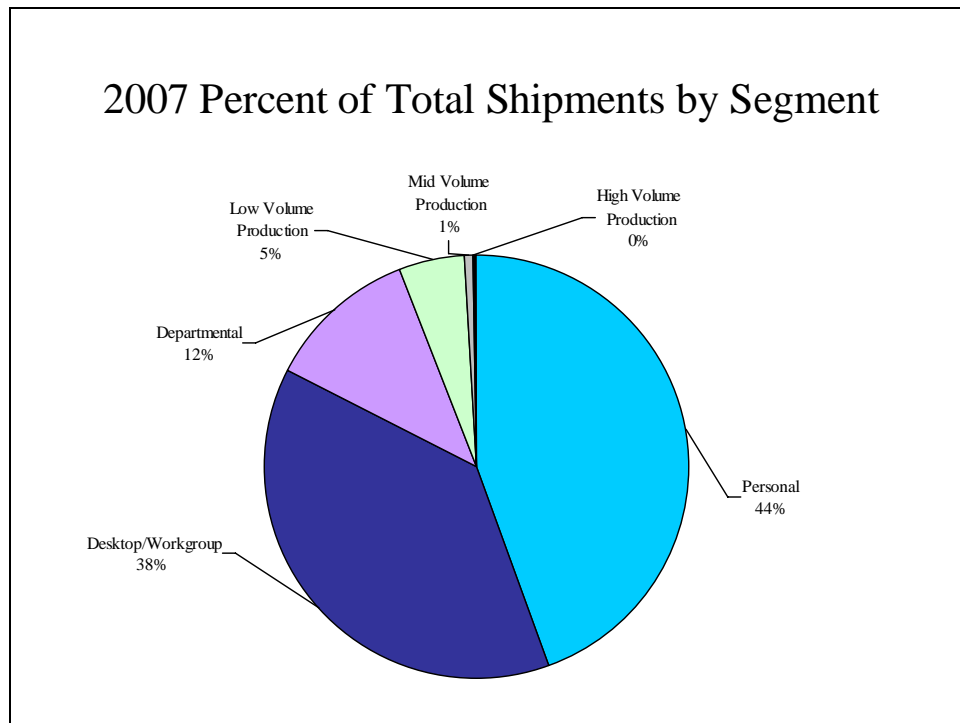


Figure 1 – 2007 Percent of Total Shipments by Segment

#### Executive Summary

The document scanner market is showing signs of maturation, finally breaking out of its imaging niche to be embraced by a more general market. Over the past year, evidence of typical knowledge workers using document class scanners has grown. Small office/home office (SO/HO) users are purchasing devices at the low end of the market while new network models have begun to appear in offices throughout North America.

Over half a million document scanners were shipped in the N. American market in 2007 which represents roughly half of the total worldwide placements. Following the growth trends of the last

couple of years, volumes are expected to remain high through 2012. Shipments to N. America alone are forecast to grow at a compound annual growth rate (CAGR) of 17% to reach 1.1 million units in the next five years. The majority of all shipments are personal and desktop/workgroup devices which meet the needs of a wide array of users.

Expect some dramatic changes for the document scanning market in the coming years. Trends toward simplicity will have vendors fine tuning their offerings and delivering more solutions. More network scanners will give users added exposure to scanning and will help vendors meet a wider variety of user requirements. Vendors will also expand distribution models to encourage corporate office products resellers and professional services companies to sell their network and single function scanning solutions. And better support for capture and search technologies within common Microsoft Office applications will surface. Once these trends solidify, the momentum in the document scanning market will accelerate.

*Susan Moyse is principal of Moyse Technology Consulting, an independent consultancy focused on the document scanning market. For more information on the trends impacting the growth of the document scanner market, please contact Susan Moyse at 781-834-7947 or [susan.moyse@moysetech.com](mailto:susan.moyse@moysetech.com).*