

Sustainability Leaders, 2023

A review of sustainability initiatives by major print vendors



Sustainability Leaders Report 2023

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Executive summary

Sustainability has long been embedded in the print industry, with circular models that aim to minimise waste and maximise the value of resources already well established. These include recycling programmes for hardware and consumables, the increasing use of recycled materials in products, and hardware that is ‘sustainable by design’ – for instance, designed for longevity and end-of-life recyclability. As the market for sustainable goods matures and customer expectations evolve, some manufacturers are enhancing their remanufactured device portfolios to offer a greater variety of devices and a more complete remanufactured offering.

Print manufacturers have set ambitious net-zero targets, with some, such as HP and Xerox, aiming to achieve net-zero by 2040. Since Quocirca’s inaugural Sustainability Leaders 2022 study, several vendors have deepened their focus on products and solutions to help customers achieve their sustainability goals. Quocirca’s Sustainability Trends 2023 study shows that organisations are placing more scrutiny on their print suppliers, with 70% saying they expect their print supplier to demonstrate that it is reducing its own environmental impact. The majority (70%) of organisations also expect their suppliers to provide sustainable products and services, and 69% say it is important that their supplier helps them to measure the environmental impact of the print infrastructure. Consequently, alongside regulatory pressure, vendors must address customer expectations and differentiate their sustainability-led propositions in an increasingly commoditised market.

However, the market lacks standardisation, and 27% of organisations say the top barrier to operating a sustainable print infrastructure is lack of environmental data about device impact. While energy-efficiency labels, such as ENERGY STAR and Blue Angel, have long been the main accreditations, newer programmes, such as ISO 14001 and ISO 50001, are becoming better known and show the depths of a vendor’s energy sustainability commitments. Beyond energy, vendors are showing their commitments to areas such as mineral usage, waste disposal, and responsible business practices through memberships in groups such as the Responsible Business Alliance (RBA), the Responsible Minerals Initiative (RMI), and the Clean Ocean Material Alliance (CLOMA). While involvement in such initiatives is laudable, this complex and varied landscape can make it difficult for buyers to make direct meaningful comparisons.

Quocirca’s study reveals that vendors are increasing initiatives around recycling, reuse, and remanufacturing. Some are incorporating new energy efficiency technologies such as lower temperature toner fusing, deeper sleep modes, and faster start-up times. When devices with such technology are part of a broader optimised fleet that includes print management solutions to minimise wasteful printing, organisations can take major steps towards reducing environmental impact.

As such, leading vendors are also creating more services for both the channel and end users, with discrete means of carrying out surveys and assessments to help identify areas for improvement across an organisation’s printer fleet. Alongside this, managed print services (MPS) are improving to include greater insights into energy usage and sustainability in a print environment, with ongoing advice offered to users for optimising their fleet.

The direction of travel is broadly positive. The print industry is building on its established focus on take-back, recycling, and reuse schemes, and extending into remanufacturing and circular economy initiatives, as well as services to support impact measurement and continuous reductions. These should resonate with an increasingly discerning customer audience as they seek to achieve measurable results from environmental protection initiatives.

This report provides an overview of the print industry’s sustainability efforts, with focus on accelerating net-zero, corporate sustainability, and enhancing product circularity for customers. It will also highlight some of the key challenges and opportunities that the industry faces in its journey to a more sustainable future.

Key findings

- **Sustainability leaders in the print industry continue to demonstrate a strong vision and commitment to net-zero.** Quocirca's Sustainability Vendor Landscape has identified HP, Xerox, Canon, Ricoh, Lexmark, and Epson as leaders with respect to their sustainability strategy and vision. Initially, many manufacturers were focused on the basic challenge of gaining enough visibility over emissions to set targets, but we are now seeing some of those targets being revised and time frames shortened as impact reduction initiatives gather momentum and companies get better at monitoring and reporting performance. Since Quocirca's 2022 study, Konica Minolta has aligned with the industry and set a target of net-zero by 2050. Lexmark aims to reach operational carbon neutrality by 2035 and full net-zero by 2050. Xerox and HP have maintained their 2040 target, and Canon and Ricoh are still targeting 2050. Epson is targeting carbon-negative status by 2050. We are also seeing more science-based target initiative (SBTi)-approved targets. The majority of vendors have now received validation from the SBTi for their Scope 1, 2, and 3 initiatives. From a reporting perspective, this year more manufacturers provided interim updates on progress toward targets.
- **Circular approaches are well-established in the industry and focus on recycled materials and product life extension is growing.** There is a strong focus on the whole lifecycle impact of devices, and manufacturers are striving to reduce raw materials impacts and end-of-life environmental effects. Remanufacturing and product life extension are solutions to these two challenges, and several manufacturers are enhancing their performance in this area. In April 2023, Konica Minolta announced that it was aiming to make its products from more than 90% circulated resources by 2050. Brother aims to increase the proportion of reused materials in its products to 30% by 2030. Several manufacturers are increasing the PCR plastic content of consumables and devices. On product life extension, examples include Sharp, which has extended the life of key components in its devices by 140%. Additionally, Epson has established an extended warranty and parts replacement programme that extends printer life cycles by up to three years, to a total of eight. Lexmark designs all its devices to last for seven or more years. Meanwhile, Canon continues to work towards greater recycling of toner and inkjet cartridges across EMEA, and is working towards making its B2C and B2B product consumables 100% recyclable and/or reusable by 2030.
- **Sustainability services for customers remain fragmented, but focus is growing.** Quocirca research shows the appetite for sustainability-focused solutions is growing, and manufacturers are starting to respond to this opportunity. All the manufacturers in this report offer some customer-focused sustainability services, but some are more mature and extensive than others. Basic tools include product comparison calculators and carbon calculators, while sophisticated offerings include full consultancy. Examples include HP's Carbon Neutral MPS, Ricoh's European Sustainability Optimisation Programme and Xerox's sustainability-led MPS. From the channel perspective, Epson's multi-vendor comparison tool is proving popular with its partners.
- **Remanufactured hardware product portfolios support circular strategies.** Circular products move away from the traditional linear product creation model of 'take-make-dispose' to a 'make-use-recycle' route. Remanufactured hardware can support carbon footprint and waste reduction goals. As opposed to refurbished products – those that are returned, retested, and redistributed – remanufactured devices are rebuilt from individual components (reused/repaired or new parts). Remanufactured product lines include Ricoh's GreenLine series of MFPs (the first remanufactured MFPs to receive ENERGY STAR certification) and Canon's imageRUNNER Advance ES Range, which provides a reuse ratio of 90%. Lexmark offers Lexmark Evergreen, a remanufactured hardware programme that refurbishes devices in selected regions. The Xerox Factory Produced New range offers devices that have been restored to meet Xerox product specifications and are deemed to be in 'like new' condition. The Xerox Factory Produced New products are upheld to the same ecolabel criteria as newly manufactured products, such as ENERGY STAR and EPEAT.
- **Vendors are deepening channel engagement.** HP is leading the charge with its Amplify Impact partner programme, offering assessment, training, and resources around sustainability. Xerox offers a specific sustainability training module for partners, plus sustainability-focused marketing materials. Lexmark's Evergreen remanufacturing scheme is fundamentally a channel offering in EMEA, with the company providing dedicated support and materials, as well as incentives for partners to participate in the collection of used printers for remanufacturing. Epson's channel-led comparison tools are helping partners articulate

the benefits of its business inkjet devices. However, for many manufacturers, there is room for greater strategic focus on channel support and messaging for sustainability.

- **HP leads in brand perception as a sustainability leader, followed by Canon and Epson.** Among IT decision-makers in the UK, France, Germany, and the US, HP holds the strongest reputation as a sustainability-focused brand. With 35% of respondents rating HP as strong, the company outpaced Canon (33%) and Epson (32%). Xerox and Brother also garnered positive recognition for their sustainability efforts, with 27% of respondents rating them as strong in this area.

Quocirca's Sustainability Leaders report complements its main [Sustainability Trends, 2023 Report](#), which analyses how decision-makers view and prioritise sustainability around the print infrastructure.

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