Cloud Print Services Landscape, 2026

Advancing cloud maturity for the print infrastructure

Cloud Print Services Market Landscape, 2026
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QUOCIRCA

Executive summary

As hybrid work becomes firmly established across organisations, digital transformation has moved to the centre of strategic planning. Technologies such as artificial intelligence (AI) are rapidly becoming core drivers for how organisations operate and compete. Cloud platforms have already demonstrated their value as flexible, scalable foundations capable of supporting the pace of change in today's markets.

However, as cloud adoption has matured, many organisations have uncovered challenges that require renewed attention. Hidden and unpredictable costs, inconsistent approaches to resource optimisation, and uncertainty about the long-term value delivered by both the cloud platform and the service provider are now common concerns. Addressing these issues is essential to ensuring that cloud environments continue to deliver sustainable business value as organisational needs evolve.

Cloud-based print management entered the market later than many other cloud services, but adoption accelerated sharply throughout 2023–2025 and is set to continue. Organisations increasingly recognise that moving print management to the cloud reduces the burden on IT teams and lowers variable costs tied to power, maintenance, real estate, and system availability.

Traditional on-premises print servers demand heavy administration and are struggling to keep pace with modern requirements. Capabilities such as AI-driven optimisation and advanced security are difficult to implement and maintain in an on-premises model. A cloud-based approach simplifies management, improves scalability, and frees IT teams to focus on higher-value digital initiatives.

The latest findings from the Cloud Print Services Market Landscape, 2026 report highlight a market in significant digital transformation. Even though only a small minority of organisations (just 14%) describe themselves as fully paperless today, the momentum toward digitisation is unmistakably accelerating. Insights from Quocirca's 2025 Document Capture study show that 78% of organisations are increasing their digitisation efforts, underscoring a growing recognition of the need to modernise document workflows.

Looking ahead, this trajectory only strengthens, with 88% of respondents anticipating that digitisation will become critically important by 2027. The cloud print market remains fragmented, with vendors taking varied approaches such as cloud-first, cloud-native, and hybrid, creating a need for clearer positioning from OEMs and ISVs. Cloud capabilities are still a secondary factor in many MPS decisions, signalling a gap in market understanding. Concerns around security, performance, and feature parity continue to slow full cloud adoption, reinforcing hybrid as the dominant model. In addition, issues such as data sovereignty, perceived latency, and cost uncertainty are further delaying a complete shift to cloud print management. Addressing these barriers requires flexible solutions that integrate smoothly across both on-premises and cloud environments.

At the same time, however, demand for AI-driven automation, predictive analytics, and stronger security is pushing organisations towards cloud platforms, often while they still hold reservations about the implications. As AI adoption accelerates, seamless integration between cloud print services and broader cloud ecosystems will become essential to support intelligent, efficient document workflows.

To succeed in this evolving landscape, MPS providers and ISV partners must:

- **Prioritise education.** Build stronger business cases across a broader set of services. Buyers will not be convinced by cloud print management alone. They need clear evidence of business value across workflow and information management, collaboration, advanced security, and flexible AI-driven services that can evolve as the market matures.
- **Offer hybrid solutions.** Concerns around data sovereignty and the perceived difficulty of moving directly from fully on-premises environments to pure cloud are driving demand for hybrid models. Providers must deliver flexible solutions that integrate seamlessly across on-premises and cloud infrastructures while offering a clear path towards fuller cloud adoption.

- **Address security and performance concerns.** Demonstrate robust security capabilities and consistent performance to reduce lingering hesitation and build confidence in cloud-based approaches.
- **Provide clarity on cloud strategies.** Help organisations navigate a fragmented market by clearly defining cloud-native and cloud-centric offerings and aligning these models with customers' specific operational and regulatory needs.
- **Acknowledge and mitigate repatriation concerns.** Understand the drivers behind cloud repatriation and offer solutions that accommodate shifting strategies. Look beyond print to adjacent services: while print management alone is rarely seen as a critical business issue, organisations recognise that information security, collaboration, and workflow efficiency are central to future success. MPS providers and partners must ensure their services address these broader priorities.

By addressing these key areas, MPS providers and ISVs can capitalise on the growing demand for cloud print services and help organisations navigate the complexities of the 2026 cloud landscape, ensuring they are well-equipped to support customers with print infrastructure modernisation strategies.

This report highlights key market trends for cloud print services and solutions, covering offerings from original equipment manufacturers (OEMs) and independent software vendors (ISVs). The following vendors are included in this report:

- OEMs: Canon, Epson, HP, Konica Minolta, Ricoh, Sharp, Xerox
- ISVs: Celiveo 365, NT-Ware (UniFLOW), OptimiDoc, PaperCut, Pharos, ThinPrint (ezeep), Tungsten Automation, Vasion (PrinterLogic)

Key findings

Cloud print adoption is strong and continues to grow, but the market is shaped by tension between the promise of cloud-enabled automation, security, and innovation and the practical constraints of sovereignty, legacy infrastructure, and risk aversion. Hybrid models dominate because they balance these forces, and both MPS providers and vendors must evolve their offerings beyond print management to deliver integrated, secure, AI-ready information workflows.

- **The cloud print market is maturing, but differentiation increasingly depends on how vendors extend beyond print.** The market remains fragmented across OEM and ISV offerings, with innovation emerging from both cloud-native software providers and OEMs that are expanding into workflow automation, analytics, and cloud-based capture services. The shift towards capture and intelligent document processing (IDP) is becoming a key point of differentiation, as vendors that combine print with scan, OCR, IDP, and workflow orchestration are better positioned to support broader digitisation and AI-ready document strategies.

- **Leaders and major players are differentiated by platform depth, security, and workflow integration.** Among the leaders, Xerox excels through its cloud-first, multi-tenant architecture, strong analytics, and broad workflow automation capabilities; Canon stands out for the breadth and maturity of the uniFLOW ecosystem and its integration of print, capture, and workflow; HP is distinguished by its scalable managed cloud infrastructure, layered security, and expanding AI-enabled workflow portfolio; Ricoh is notable for its flexible cloud-first platform strategy and integration across workplace, print, and digital services; and Konica Minolta stands out for its comprehensive cloud print and workflow suite, strong zero trust orientation, and device-agnostic cloud capabilities. Among the major players, Sharp is distinguished by the growing Synappx ecosystem and its expansion into AI-driven cloud capture and device management, while Epson stands out for reliable, cost-effective cloud print and scan services that are easy to deploy and manage, particularly through the channel.

- **Within a broad ISV market, differentiation is strongest where cloud print is combined with capture, security, and workflow automation.** Among the ISV ecosystem, PaperCut is notable for its broad cross-platform compatibility, mature cloud transition strategy, and strong support for mixed fleets; Pharos stands out for its cloud-native architecture, strong analytics, and zero trust-aligned security; Tungsten Automation excels through the combination of Printix cloud printing with capture, OCR, and hybrid integration; and Vasion stands out for unifying serverless print, output automation, and document workflow automation within a secure, cloud-native platform.

- **Cost, security, and print server reliance dominate top print management challenges.** Overall, 41% of organisations cite cost control as a primary concern, rising to 46% in the midmarket. This is followed by hybrid workplace security (38%) and the high overhead of on-premises servers (37%). This data represents a significant opportunity for suppliers of cloud print management platforms to educate customers on how robust cloud architectures can mitigate the capital and operational expenses associated with physical server deployment.

- **On-premises print infrastructure is becoming a more significant pain point.** Concern about the cost of purchasing and maintaining on-premises print servers rose from 31% in 2024 to 37% in 2025, with smaller and midmarket organisations particularly affected (40%). Energy consumption, resilience, and administrative overhead are key contributors. Serverless and fully managed cloud or hybrid print services are increasingly attractive as a means of removing infrastructure burden from IT teams.

- **Cloud print adoption has reached the mainstream but varies by region.** Overall, 78% of organisations report that they are using some form of cloud print management, rising to 86% in the UK and 92% in the retail sector and dropping to 67% in France. In high-adoption regions and sectors such as retail, MPS providers and cloud print management vendors have a significant opportunity to lead with education on the cost and security benefits of robust cloud platforms to drive infrastructure modernisation.

- **Security concerns continue to drive hybrid cloud models.** Top barriers to cloud print adoption are data security (34%, rising to 44% in Germany and 41% in the US), reliability and uptime (25%, rising to 31% in Germany), and consistent printing across a multi-vendor printer fleet (22%). SMBs are most concerned about performance (28%), and data sovereignty concerns are highest in larger organisations (20%).

- **AI maturity closely tracks cloud maturity, and print is part of the on-ramp.** Over half (53%) of organisations in which AI is fundamental to strategy are cloud-native, compared with just 18% of those yet to begin AI exploration. Cloud platforms are increasingly seen as the only viable foundation for AI-driven automation and analytics. Cloud print management is no longer just an operational decision; it is becoming a strategic enabler for AI-ready, intelligent document workflows.
- **Investment in cloud document capture is accelerating alongside cloud print.** More than three quarters (77%) of organisations expect growth in cloud capture adoption, with 35% anticipating a significant increase and a further 42% expecting a slight increase over the next 12 months. Scan volumes are also rising, with 66% expecting increased MFP usage. Cloud print and cloud capture are converging into a single, AI-enabled document infrastructure, creating opportunities for vendors that can deliver integrated platforms.
- **MPS providers are critical in the cloud journey.** Helping simplify complex cloud transitions will become a primary competitive differentiator. Overall, 40% of MPS customers say it is very important that their MPS provider helps with the shift to cloud print infrastructure, an increase from 30% in 2024. This rises to 50% in the US and 49% in the UK, but drops to 17% in France. Satisfaction with support in shifting to cloud print infrastructure is good, with 42% stating their MPS partner has been very effective with helping them make this transition. This reinforces the shift in the MPS role from device supplier to broader digital services partner, with cloud migration, security, workflow, and information governance becoming central to long-term customer value.
- **The market outlook points to continued cloud growth, but with hybrid as the dominant path forward.** Adoption will continue to expand as organisations seek lower infrastructure overhead, stronger security, and better support for AI-enabled automation and digitisation. However, full cloud migration will remain gradual, with hybrid models prevailing where customers need flexibility around sovereignty, resilience, legacy integration, and performance, while the strongest vendors will be those that connect print, capture, workflow, analytics, and security into a coherent cloud platform strategy.

Table of contents

Vendor Landscape

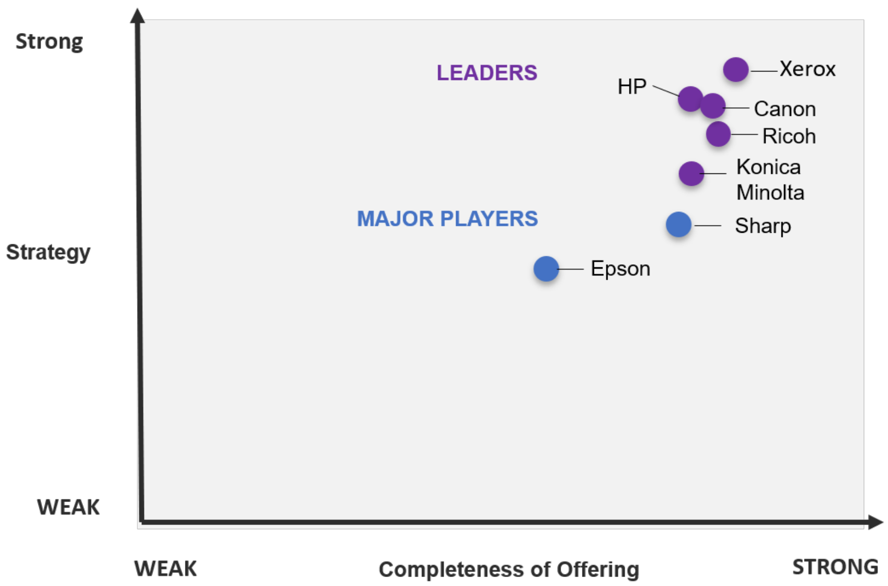
Quocirca's Vendor Landscape for the Cloud Print Services market includes the major MPS providers offering cloud-based services (Figure 9). Independent software vendors (ISVs) and OEMs that did not participate in the vendor submission process have not been included in this Vendor Landscape. This evaluation of the cloud print services market is intended as a starting point only. Please note that Quocirca's scoring is based on an unweighted model, and prospective buyers should use this as guidance alongside the more detailed vendor profiles to assess suppliers based on their specific requirements.

Quocirca has based this Landscape on vendors' completeness of offerings and strategies across the following key areas:

- **Overall cloud strategy and vision.** The comprehensiveness of the vendor's cloud strategy, the quality of its overall value proposition, and its future roadmap.
- **Maturity of offerings.** How long the vendor's cloud print services offering has been established in the market.
- **Geographic reach.** A vendor's geographical reach, through either direct engagement or the channel.
- **Breadth and depth of service offering.** Provisioning, deployment, and implementation of cloud-based print services, as well as support for hybrid cloud models.
- **Multi-vendor support.** Support for a mixed-fleet environment.
- **Digital workflow automation.** Adjacent cloud-based services that extend print into document workflow, AI-enabled capture, and automation.
- **Cloud security and zero trust.** Approach to zero trust and cloud security models.
- **Analytics and reporting.** The breadth and depth of capabilities to provide analytics and reporting.
- **Channel tools and enablement.** Flexible cloud platforms to support channel partners.

Vendors are categorised as:

- **Market leaders.** Vendors with the strongest strategic vision, broadest service depth, and most mature delivery capabilities.
- **Major players.** Vendors that have established and proven offerings on a regional basis and may be more focused on a single brand environment.



The Quocirca Vendor Landscape is a graphical representation of Quocirca's opinion of the market and is based on Quocirca's scorecard methodology. This information is provided as a visual representation only and should be combined with other sources to determine the suitability of any vendor. Quocirca does not endorse any vendor, product, or service. Information is based on best available resources and opinions reflect judgment at the time. All opinions are subject to change.

Figure 1. Quocirca Cloud Print Services Landscape 2026

Recommendations

Buyer recommendations

Overall, cloud-based business solutions can offer a more effective means of enabling business functions for organisations than on-premises solutions. As long as the buyer carries out due diligence and finds the right solution, variable costs, business interference from downtime, security lapses due to lack of updating systems, and so on should all be more easily avoidable. Increasingly, cloud-based solutions also offer a much better way to keep up with the pace of change in modern, business-critical technologies.

Buyers should look to:

- **Design a clear specification for prospective print management solutions.** Identify the key features you need, such as reporting, analytics, security, and pull printing. Ensure that the future is catered for: do not just look at simple print management functions, but consider what is required around a total information management solution, including IDP, workflow, collaboration, and security.
- **Consider existing enterprise systems.** Integration of data workflow, whether as digitised inputs via scanning or outputs via printing, must be considered when looking at existing enterprise systems such as ERP, CRM, and HR. Ensure that the chosen solution adheres to open standards to more easily enable such integrations.
- **Compare the relative merits of fully on-premises, hybrid, and fully cloud-based solutions.** Your existing solution may require a stepping stone to the cloud, dictating the need for a hybrid solution of on-premises and cloud-based print management capabilities. In other cases, the need for information security and fears around data sovereignty may dictate a different hybrid approach, combining on-premises management for aspects of the print environment with cloud-based management for others.
- **Focus on security capabilities.** The lifeblood of any organisation lies in its intellectual property, which is tied up in its electronic information. Ensuring that such information is secure must outweigh all other considerations. Factors to consider include availability of zero trust support; data encryption throughout the print management process; integration capabilities with adjacent third-party tools such as data leak prevention (DLP), digital rights management (DRM), and identity and access management (IAM); and support for output security features such as smart card release, biometrics, Bluetooth, and PIN printing.
- **Consider other areas where integration is required.** Printers and MFPs are advanced IoT devices that provide a wealth of analytical data that can be used to optimise deployments, minimise costs, monitor use, indicate environmental impacts, and maintain availability. Data generated on print devices may also be of use to other enterprise systems, such as building information modelling (BIM) and intelligent building management systems.
- **Consider the future of print drivers.** For those operating a primarily Microsoft compute environment, remember the company is changing the way print drivers will be layered over its own environment in the future. The move to enforcing the use of Microsoft Windows Protected Print Mode will mean print device OEMs and print management vendors will need this new model to provide enhanced printer capabilities. Ensure that a chosen provider is planning for this.
- **Ensure clear, comprehensive, and appropriate pricing.** Cost is a major issue stated by cloud users. This is generally based around cloud platform providers offering a raft of costs based on different uses. Pricing should be much clearer for print management. Vendors may offer per-device, per-user, per-queue, or per-time segment models. Specific pricing models may be more advantageous depending on usage and the number of devices. Ensure that the chosen solution offers clear and predictable billing. Organisations should also allow for changes in the size and configuration of the print fleet.

Supplier recommendations

Not only is the cloud here to stay, but buyers are increasingly looking at it as a first choice. However, there remain numerous actual and perceived issues around cloud usage. A balanced portfolio of robust cloud-native, hybrid cloud, and on-premises print management capabilities is essential, empowering customers to adapt their cloud journey according to evolving needs and risk tolerance.

To effectively address this dynamic market, suppliers of cloud-based print services and solutions should:

- **Directly address user concerns.** Ensure security concerns are addressed by demonstrating robust encryption for data on the move and at rest, access control, and threat detection capabilities. Ensure your solution integrates well with third-party security tools (e.g., SIEM systems) and meets relevant regulatory and industry-specific standards. Offer solutions that allow customers to control their data and comply with regional regulations, leveraging sovereignty services from the cloud provider and hybrid solutions using on-premises devices that restrict data storage to within the customer's own environment. Provide transparent and predictable pricing models, demonstrating clear cost benefits and ROI.
- **Offer tailored migration strategies and embrace hybrid flexibility.** The market is not an 'either/or' choice for customers. Although many organisations are now looking for a cloud-first/cloud-only print management solution, many others are caught in what they perceive as a trap of on-premises functionality that they need to maintain. Guide customers through the journey, providing expert advice and customised migration plans. Offer seamless integration between on-premises and cloud solutions, enabling gradual migration and mitigating repatriation risks.
- **Develop cloud-native and cloud-centric offerings.** Help customers navigate the fragmented market by developing offerings supporting every stage of their cloud journey. Clearly define each solution and provide consultancy to ensure customers understand what each solution offers and the relative merits of each. Provide a roadmap for cloud print management that aligns with the business's cloud strategy.
- **Ensure that 'print management' is not just about print.** Buyers are looking for desired business outcomes, not just cost savings through carrying out administrative IT functions more efficiently. IDP, workflow, and collaboration are all areas where print providers should be extending offerings to give businesses a better means of dealing with their intellectual property.
- **Focus on meaningful AI integration.** Do not just jump on the AI bandwagon, repurposing machine learning or analytics capabilities as AI. Look to how basic AI can offer distinct and discrete benefits around fleet optimisation, lowering operational costs and enhancing fleet availability. Work on integrating other AI capabilities, such as advanced IDP and workflow optimisations, to enable customers to better compete in their markets. Look at generative AI, agentic AI, and other forms of AI to provide better ways of delivering information and information flows around the business and to customers, suppliers, and other external stakeholders.

Vendor profile: Ricoh

Quocirca opinion

Ricoh is positioned as a Leader in Quocirca's assessment of the Cloud Print Services Landscape in 2026. Ricoh's vision for cloud print services is to redefine how organisations manage their print environments by delivering secure, reliable, and intelligently managed solutions that integrate seamlessly into the modern workplace. Ricoh's cloud print strategy is core to its transition towards becoming a digital services-led intelligent workplace provider across process automation, workplace experience, and cloud cyber services.

Cloud-first, digital-first delivery model

Ricoh has adopted a cloud-first, digital-first delivery model. Its cloud-first approach aims to simplify the user experience, enhance operational efficiency, reduce costs, and strengthen security. Moving print services to the cloud enables continuous updates, simplified management, and reduced IT overhead, giving service teams a unified, proactive way to monitor and optimise customer environments.

Through open APIs and cloud-native architecture, Ricoh's asset management ecosystem integrates with platforms such as ServiceNow and RICOH Spaces, creating a unified workplace experience across print, meeting room technology, AV, lockers, and end-user devices. Integration with RICOH Spaces allows users to locate printers, receive routing guidance, and access print services from the same interface used for broader workplace interactions.

Flexible, scalable cloud infrastructure

Ricoh provides a flexible, scalable cloud infrastructure that delivers secure and reliable print management. Its cloud infrastructure is engineered for global scale, high availability, and reliability, supported by its ISO 27001-certified Digital Operations Centre (DOC) and Global Security Operations Centre (GSOC). The infrastructure scales dynamically to customer needs, offers disaster recovery options, and includes geolocation-based storage models for stronger business continuity.

Ricoh's solutions are optimised for multi-cloud environments, ensuring interoperability, high availability, and redundancy and backed by enterprise-grade security – zero trust principles, end-to-end encryption, and strong authentication protect sensitive data at every point in the workflow. In addition, Ricoh maintains continuous oversight of device configurations, firmware, and certificates and meets global standards such as GDPR, ISO 27001, SOC 2, and WCAG.

Ricoh's primary cloud print services run on Microsoft Azure and AWS and can also be deployed into customer-managed environments. Services such as RICOH Spaces are available via the Azure Marketplace.

Product overview

RICOH CloudStream

RICOH CloudStream is a hybrid cloud platform designed to reduce reliance on traditional print servers while maintaining resilience for local sites. It provides centralised management of multi-vendor print devices through a unified web interface; supports remote deployment of drivers, firmware, and security updates; and enables secure pull printing, with jobs held in the cloud, on a gateway, or on the user's PC until the user authenticates at the device.

Built on zero trust principles, RICOH CloudStream security protocols help prevent data breaches and unauthorised access, ensuring secure document workflows. Other key features include usage monitoring, cost control, and detailed reporting; location-aware printing; the ability to create personalised and automated scan workflows; and integration with cloud services such as OneDrive and SharePoint. A single WPP-compatible IPP print driver synchronises automatically across PCs. RICOH CloudStream also enables remote device management via embedded agents on Ricoh devices.

RICOH Streamline NX

RICOH Streamline NX is a scalable document management solution for on-premises, private cloud, and VPN-less environments. It is designed to optimise print, device, and scan management for mid-market and enterprise organisations. Key features include remote device management, including batch configuration, firmware and software updates, and secure pull printing, with jobs held on the server until user authentication.

Streamline NX provides a unified management console with more than 90 standard reports and 35 dashboard reports; supports automated scan and capture workflows such as scan-to-email, send-to-folder, and send-to-cloud destinations; and features mobile printing and scanning capabilities.

Streamline NX enhances security through multiple authentication methods including network login, PIN, card, mobile, and FIDO2. It also integrates with Ricoh MyPrint for quotas and payment services, Ricoh Certificate Enrolment Service for automated certificate management, the Ricoh Card Reader Remote Configuration Tool, Ricoh InfoPrint Manager for secure mainframe printing, and Microsoft Universal Print.

RICOH Smart Integration
RICOH Smart Integration (RSI) is a cloud-based platform that streamlines document workflows and print management and offers modular apps that allow small businesses and partners to tailor their RSI experience.

RSI Connectors enable users to scan documents directly to email or cloud-based storage solutions such as Microsoft 365 and Google Workspace. RSI LogicFlow provides AI-powered automated data extraction, validation, and routing, reducing manual errors, maintaining data integrity, and accelerating document processing times. RSI Control+ offers cost allocation, quotas, reporting, and usage analysis, while centralised device management allows administrators to monitor and control multiple printers from a single dashboard. Robust security measures include zero trust-based authenticated secure printing to protect devices, documents, and users.

Key differentiators

- **Global, enterprise-grade security.** Ricoh embeds security by design across its cloud portfolio – secure development, vulnerability management, zero trust-aligned architectures, and strong identity integration – supported by ISO 27001-certified DOC and GSOC teams providing 24/7 monitoring, incident response, and continuous improvement.
- **Flexible, scalable deployment.** Ricoh's cloud services platform is architected for high scalability and deployment flexibility, meeting the technical and regulatory requirements of SMBs, partners, large enterprises, and government agencies.
- **Seamless workplace experience.** Ricoh's global multi-vendor cloud platform delivers a consistent, high-performance print and capture experience across all vendors' devices. Advanced cloud device management removes the need for servers or agents and reduces IT complexity.
- **Broad portfolio.** Ricoh has one of the industry's broadest cloud print and device management portfolios, combining Ricoh-developed IP with curated partner technologies that support any customer, vertical, or channel across all deployment models, from multi-tenant SaaS to reserved, compliance-driven hosting.

About Quocirca

Quocirca is a global market insight and research firm specialising in the convergence of print and digital technologies in the future workplace.

Since 2006, Quocirca has played an influential role in advising clients on major shifts in the market. Our consulting and research are at the forefront of the rapidly evolving print services and solutions market, trusted by clients seeking new strategies to address disruptive technologies.

Quocirca has pioneered research in many emerging market areas. More than 15 years ago we were the first to analyse the competitive global market landscape for managed print services (MPS), followed by the first global competitive review of the print security market. More recently Quocirca reinforced its leading and unique approach in the market, publishing the first study looking at the smart, connected future of print in the digital workplace.

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