Office Products Market Update Report 2009

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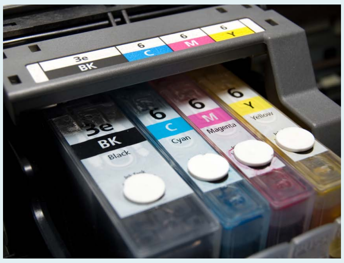
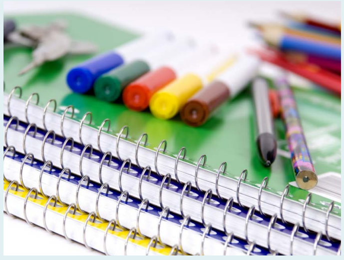
Report Outline

Office Products Market Update Report, 2009

Report overview

This report provides a comprehensive overview of the key components of the Australian office products market. It is designed as a concise update version of our more substantial two yearly office products report, the latest of which is entitled, "Office Products in Australia, 2008-2010."

A brief snapshot...

The office products market like that of the overall economy has endured a severe shock over the last 12 months, as a result of the global financial crisis. The effect of these events will play out across the office products market over the next two years – and beyond.
The current landscape is different from what most industry operators have experienced and requires different strategies to operate successfully.

In the current market, consumers are now most receptive to 'value' products and in particular items or technologies that allow them to operate more productively or at lower costs. In this sense industry operators have the opportunity to take the approach of being a provider of 'productivity enhancing tools' and/or 'cost saving products.'

While it is apparent conditions are extremely tough, our survey of dealers highlighted there is considerable resilience amongst operators. In fact many feel a real sense of opportunity beckons. With economic indicators pointing to a shallower downturn and faster recovery than initially predicted, we believe 2009 will be prove to be a period where major competitive advantages are won and lost.

These and other insights are presented within this report.

About this report

This report provides a condensed view of all the primary components of the Australian office products market in 2009. It measures market size and growth rates in various dimensions, identifies trends and particularly looks at the impact of the GFC on the market. Also provided are the latest dealer market shares and commentary, as well as our forecast of conditions and growth rates to 2010.

This publication utilises the data assembled from our previous highly detailed research (n=1,193) published in 2008. We have updated the key components of the "Office Products in Australia, 2008-2010" report through a survey of industry participants (OP dealers).

The document can be used as a strategic planning tool and 'opportunity spotter' as well as an industry reference manual. It is designed primarily for operators involved in the industry – whether as manufacturers/suppliers, distributors/dealers or print providers.

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Overview

How this report can help you

This report is designed so industry participants can understand key aspects of the market they are operating in, the forces that are re-shaping it as well as the influence of market conditions – now and into the future. The document will facilitate the identification of growth opportunities and provide a base for strategy development and future growth.

Within this report we include a broad range of office product categories. These have been split into 16 categories - 10 categories of 'core office products' and six 'non-core office products.'
For each product category we include market size, recent growth rates and forecast growth to 2010. The categories covered are as follows.

1. **Core office products.** We use this term throughout the report, to depict the range most normally sold by office product dealers to consumers. They include:

Writing Instruments
Paper
Pads and Books
Labels and Envelopes
Computer Consumables
Computer Accessories
Filing Products
Presentation Products
General Office Supplies
Business Machines

2. **Non-core office products.** These are products that have not traditionally been sold by dealers to consumers, but which are increasingly sold by them now. They include:

Office Furniture
Kitchen/Canteen Supplies
Cleaning & Janitorial
Printing & Copying Services
Promotional Products
Art & Craft

Chapter summary

Following the Introduction and Key Points Summary, the report comprises five chapters, as described below.

Chapter 3 – Market overview. An analysis of market size and growth rates from 2000 to 2010f, assessment of current market conditions, the impact of economic downturn, latest market trends and drivers.

Chapter 4 – Consumers. Includes data on each of the seven consumer segments (micro businesses, small business, medium business, large business, Government, students and households). Data includes segment size (amount spent), recent growth and growth outlook to 2010. Also an analysis of the latest numbers of office workers.

Chapter 5 – Products. For each of the listed 16 categories we include market size (in dollars), recent growth and growth outlook to 2010. Additional survey data on fastest/slowest growth categories plus 'green' products.

Chapter 6 – Office product dealers. Provides dealer market shares for over 25 operators, review of how well major dealers are performing and key challenges and opportunities facing OP dealers.

Chapter 7 – Outlook to 2010. Our projections of market developments, including forecast growth by category and consumer segment, to 2010.

CONTENTS

Methodology

Research methodology

This report is based on a combination of desk research, a survey of office product dealers and 'consultant' interviews (informal) with a number of industry operators.

- ***Office products dealer survey***

We surveyed managers within office product dealers, using a structured set of questions. These surveys were completed online in February and March 2009.

A total of 47 office product dealers completed our survey.

Sample profile – dealer survey

Office product dealers survey - respondent profile

	Number	% Share
Type of Dealer		
Specialist office product retailer	21	45
Commercial / contract dealers	22	47
Other	4	8
State		
NSW	18	37
VIC	4	9
QLD	15	32
SA/NT	5	11
WA	5	11
Gender		
Female	7	15
Male	40	85
Annual turnover		
<$1m	10	21
$1-5m	29	62
$5-20m	5	11
>$50m	3	6
Total	47	100

- ***Desk research***

We have reviewed a variety of published data sources to assist with market estimates and insights provided in this report. These include for example:

- Australian Bureau of Statistics (ABS) - eg employment, labour force, technology adoption in households.
- Import statistics.
- Trade magazines.
- Annual reports of industry operators.
- Economic forecasts.

In addition to the above we have maintained contact with a number of industry operators to ensure we are aware of market issues and trends as they develop.

Office Products Market Update Report, 2009

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