

*Report Outline*



# NON-CORE OFFICE & WORK SUPPLIES

# 20<sup>18</sup><sub>20</sub>

A MARKET REPORT

PenfoldResearch





This research report, now in its third edition provides an in-depth analysis of the fragmented and increasingly important \$6+ billion market for non-core office & work supplies in Australia.

The report is based on a survey program with over 700 business purchasers combined with extensive secondary (desk) research.

## A Current View

Our research reveals a strong, healthy but immature and relatively fragmented 'non-core' market. This combined with buoyant/steady business conditions and no systemic threats, highlights a significant strategic opportunity for operators at present. However, the divergent nature of the non-core product categories & variances in customer behaviours across these, present a challenge (not insurmountable) for suppliers. Compared to the core (traditional) office products market, the non-core market is larger, more complex, populated by less professional suppliers and has a much more promising growth trajectory.

This report defines market composition and structure, measures products, brands and customer segments, as well as dealer/retailer market shares – and these operators' individual strengths & weaknesses. It also identifies key areas of growth and our assessment of the best categories and segments for operators to target for higher growth.

## Report features

- The only comprehensive analysis of this new and emerging market.
- Independent perspective, commentary and analysis.
- An extensive survey program of 706 interviews with business purchasers of non-core products.
- Comprehensive trend tracking – ie comparison of survey results with two past research programs (2013 & 2016) - to highlight where key changes are occurring.
- Product category sizes, growth and outlook – including identification of the most attractive areas for operators to develop.
- Market sizes and brand share measurement for over 20 individual products – including analysis of the strengths/weaknesses of major brands.
- Customer purchase behaviour analysis – by business segment (ie micro/small/medium/large/Government) – including segment size (\$s), growth/outlook and identification of the most attractive segments to target.
- Competitive analysis of all major dealers/retailers (market share/sales, net promoter scores & customer ratings including strength/weakness analyses).
- An ongoing enquiry/advisory service.
- Digital and printed versions of the report are provided to all subscribers.

## Product categories covered

<b>Kitchen supplies</b>	– eg Coffee, tea, sweeteners, biscuits
<b>Cleaning &amp; Janitorial Products</b>	– eg Paper hand towels, toilet paper, surface cleaners, hand cleaner
<b>Office Furniture</b>	– eg Office chairs, desks, filing cabinets
<b>Printing Services</b>	– eg Flyers / leaflets, business cards, brochures, large format (A3+)
<b>Promotional Products</b>	– eg Pens, polo-shirts, hats, sticky notes, cups
<b>Work Wear &amp; Safety Equipment</b>	– eg Work shirts, safety glasses, hi-vis jackets, gloves, footwear
<b>Packaging Supplies</b>	– eg Packaging tape, cartons, bubble wrap, labels



## Overview

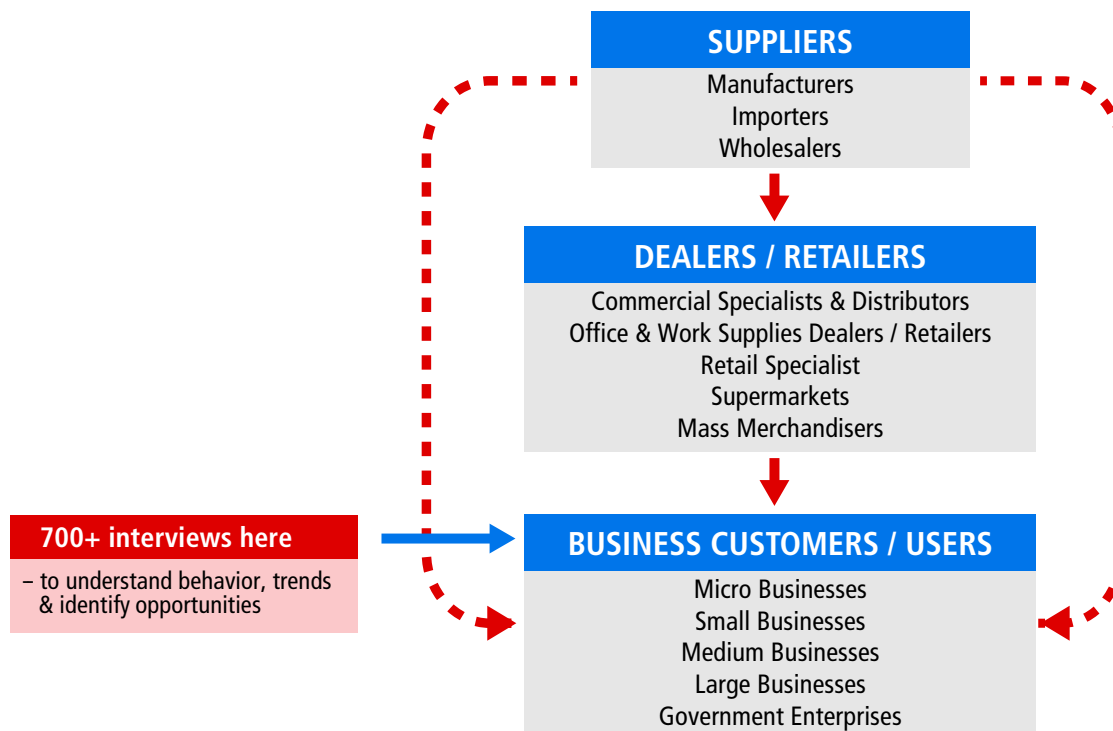
### Subscribers will be able to use this research to:

- **Identify where growth opportunities lie.** Which areas of the market will grow fastest and offer the strongest prospects – in terms of categories/products, customer types and distribution channels.
- **Measure brand shares** – and understand the importance of brands across different categories – as well as identify the strengths/weaknesses of individual brands.
- **Benchmark performance against your competitors.** Confirm competitors (and your own) market positioning as well as strengths and weaknesses via customer ratings.
- **Adjust your 'offer' to appeal to customers needs.** Customer research findings will facilitate decisions on marketing, purchase 'triggers,' ranging, pricing and distribution .
- **Assist with your internal planning and budgeting.** Use our forecasts and projections to help formulate your plans for the next budgetary period.

The report covers all the main components or 'sectors' that make up the market, including customer segments, dealer/reseller types, as well as the products/categories and brands they purchase.

The breadth of market coverage is set out in the table of contents on the pages which follow.

### Market Structure





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The report is based on a survey program with business purchasers of non-core categories as detailed below.

This is supplemented with an extensive program of desk research utilising, for example; ABS statistics, ASIC reports, import data and media articles.

## Research methodology

### Business survey (n=706)

We surveyed business purchasers of non-core products, using a structured set of questions. Sample quotas were set specifying the breakdown of the sample, to broadly replicate the overall business population. See the sample profile below.

### Non-Core Business purchasers survey - respondent profile

	Number	% Share
<b>Product category responsible for</b>		
Kitchen supplies	278	39
Cleaning/ Janitorial	276	39
Office Furniture	277	39
Printing	270	38
Promotional	272	39
Work wear/ Safety	270	38
Packaging	276	39
<b>Business (size) &amp; Government</b>		
Micro (< 5 workers)	233	33
Small (5-19 workers)	191	27
Medium (20-99 workers)	155	22
Large (100+ workers)	127	18
Government	97	14
<b>Region</b>		
NSW	209	30
ACT	8	1
VIC	180	25
TAS	18	3
QLD	146	21
SA	56	8
NT	4	1
WA	85	12
<b>Total</b>	<b>706</b>	<b>100</b>



## About Us

Penfold Research is a business focused on providing research and advisory services to operators in the work supplies, office products and related sectors. Our difference is that we are a specialist researcher who understands the market/s we work in.

Companies that purchase our reports are some of the largest and most successful in the industry, covering a wide range of categories and sectors. They include manufacturers, importers, direct dealers, retailers as well as consulting firms and financial institutions.

Penfold Research is headed by Andrew Penfold. He set up Penfold Research in 2007 following 8 years working in a major B2B research and forecasting house. He is the author of the "Office Products" market report series, which has become a widely used reference tool across the industry.

Andrew is a full member of the Australian Market and Social Research Society (AMSRS).

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