



THE GERMAN OFFICE PRODUCTS MARKET 2003-2008

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1. INTRODUCTION

1.1 BACKGROUND TO THE STUDY

Since 1986, MPA International has been widely recognised as the leading research agency serving the UK office products market. Our in-depth research reports on the UK market are widely regarded as *the* authoritative industry studies.

In recent years the office products industry has undergone rapid change, with the pan-European consolidation of manufacturers and distributors. Indeed, even office products buyers at end-use level are increasingly considering pan-European supply arrangements. Accordingly, there is increasing demand for office products market information on a European basis. In October 2002, MPA International published *The German Office Products Market*, its second study of this market. This survey is an update of this report.

1.2 OBJECTIVES OF THE STUDY

The objectives of this study are as follows:

- 1 To identify the size of the office products market in Germany in 2003, by product type.
- 2 For each product sector, to provide indications of key trends, major manufacturers and distribution channels used.
- 3 To outline any developments in office technology, demographics and purchasing behaviour affecting user demand for office products.
- 4 To document the structure of distribution of office products in Germany, to identify the key players and to provide estimates of market shares by distribution channel in 2003.
- 5 To provide a forecast of market value in 2008 by product sector, and an estimate of distribution channel shares.

1.3 SCOPE

1.3.1 Products

The report covers German national market *consumption* of the following office products:

Table 1
Product Sector Coverage

Sector	Subsector
Commercial envelopes	Commercial paper envelopes
Books & pads	Exercise books, memo & refill pads, duplicate & triplicate books, manuscript books, analysis books.
Cut office paper	Copier/laser grades, top quality writings, specialist inkjet papers, offset and duplicator papers
Writing & graphic supplies	Pencils, ballpoints, rollerballs, gel ink pens, liquid ink pens, fountain pens, fibre tip pens, plastic tip pens, highlighters, markers, refills, erasers, correction aids, pencil sharpeners and rulers
Storage & filing products	Manila files, expanding files, soft plastic filing & display books, suspension filing, ring binders, lever arch files, archival filing, indexes and dividers
Electronic office supplies	Laser & inkjet printer cartridges, data storage media, transparencies, computer labels, media storage & CD cases, computer cleaning products, screen filters, copyholders, mouse mats, foot/wrist rests, computer luggage, computer security, cables
Office & desk accessories	Adhesive tapes, repositionable notes, paper & card adhesives, scissors, staplers, staples, staple extractors, punches, guillotines/trimmers, letter trays/racks, waste bins, rubber bands, paper clips, other pins & fasteners
Presentation & planning	Planning boards & year planners, wallboards & cork boards, flipcharts & accessories, stock diaries
Office furniture	Seating, desking, storage, computer trolleys and screens

Source: MPA International

1.3.2 Base Year

The base year for the study is 2003, with forecasts given to 2008.

1.4 METHODOLOGY

1.4.1 Overview

The methods of research used in the study can be divided into three distinct stages, namely:

- A programme of desk research

- A series of interviews with manufacturers and distributors of office products
- Data analysis and report writing

1.4.2 Desk Research

MPA International conducted a search for, and detailed study of, all relevant government statistics, trade figures, media publications and company reports pertaining to the office products industry.

1.4.3 Manufacturer and Distributor Interviews

The major manufacturers and distributors of the products covered in this survey were researched via in-depth interviews, which were supplemented where appropriate by further telephone interviews to collect and verify data.

1.4.4 Analysis and Reporting

All of the data collected during the research was collated, analysed and the report written. A variety of analysis techniques were used, including MPA International's system of multiple linked spreadsheets, which represent a mathematical model of the office products and stationery market in each country. This system enables the compilation of accurate distribution shares and market values at user buying prices and permits market data compiled by MPA International to be verified by a thorough cross-checking process.

1.5 DEFINITIONS

The following abbreviations and terms are used throughout the report:

Table 2
Definitions

Term	Definition
MSP (manufacturer selling price)	The price at which manufacturers sell products to resellers or direct to users. Where goods are factored it represents the final manufacturer's selling price. Where goods are imported it represents the exporter's selling price.
UBP (user buying price)	The price at which the eventual user buys the product (ie a net price, which is not necessarily the price at which it is marketed).
% gross margin	The difference between the buying and the selling price, expressed as a percentage of the selling price.

Source: MPA International

1.6 EXCHANGE RATES

The following exchange rates were used to compile this report:

Table 3

Euro Exchange Rates at October, 2002

Economy	Value Of Euro	Local Currency Value
UK	£0.6287	€1.5907
USA	\$0.94254	€1.06096

Source: OECD

Table 4

Euro Exchange Rates at October, 2003

Economy	Value Of Euro	Local Currency Value
UK	£0.69659	€1.4356
USA	\$1.14189	€0.8757

Source: OECD