

THE BENELUX OFFICE PRODUCTS MARKET 2004-2009

**© MPA International
APRIL 2005**

CP House, 97-107 Uxbridge Road, Ealing, London W5 5TL
Tel: +44 (0) 20 8832 7770 Fax: +44 (0) 20 8566 4931
E-mail: mpa@brg.co.uk
Website: www.mpainternational.com

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form, or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior permission of the copyright owner.

NOTE

The information given in this report has been compiled from published sources and interpreted from fieldwork based on informed opinions. Whilst every care has been taken in the preparation of the report, there may have been some errors in the information obtained. Although it is impossible to verify every single detail by cross checking, we believe the general picture provided is reasonably accurate and comprehensive.

Many of MPA International's reports contain an overview of selected company financial information and capabilities based on published sources where available. Although the companies represented are believed to be the major suppliers the profiles are meant to be indicative rather than definitive.

It is fundamental to the philosophy of MPA International to constantly seek to extend and improve our service to clients. In pursuit of these aims, we shall be pleased to consider all requests for regular or periodic updating of all or any part of the information contained in this report, or for extensions in coverage in terms of product areas, market sectors and/or geographic regions.

We are, of course, always happy to discuss with any subscriber the possibility of undertaking further work, whether arising out of this report, or in different business areas.

MORE INFORMATION ON MPA INTERNATIONAL

At the end of this report you will find a copy of our corporate brochure and a list of our latest published reports. Should you require more information on either our published reports or our private client services, please contact us at the address given.

Full details on all of MPA International's published studies (including full tables of contents and tables of tables) and ad-hoc research services can be found on our website:

www.mpainternational.com

CONTENTS

1. INTRODUCTION.....	1
1.1 BACKGROUND TO THE STUDY	1
1.2 OBJECTIVES OF THE STUDY	1
1.3 SCOPE	2
1.3.1 Products	2
1.3.2 Base Year	2
1.4 METHODOLOGY.....	3
1.4.1 Overview	3
1.4.2 Desk Research.....	3
1.4.3 Manufacturer and Distributor Interviews	3
1.4.4 Analysis and Reporting	3
1.5 DEFINITIONS.....	4
1.6 EXCHANGE RATES	4
2. MARKET SUMMARY	7
3. ECONOMIC BACKGROUND.....	9
3.1 BASIC ECONOMIC INDICATORS.....	9
3.1.1 Belgium	9
3.1.2 The Netherlands	10
3.1.3 Luxembourg	11
3.2 FORECASTS	11
3.2.1 Belgium	11
3.2.2 The Netherlands	12
3.2.3 Luxembourg	12
4. USER TRENDS.....	13
4.1 POPULATION TRENDS	13
4.1.1 Overview	13
4.1.2 Belgium	14
4.1.3 The Netherlands	15
4.1.4 Luxembourg	16
4.2 EMPLOYMENT TRENDS.....	17
4.2.1 Overview	17
4.2.2 Belgium	18
4.2.3 The Netherlands	19
4.2.4 Luxembourg	21
4.3 BUSINESS TRENDS	22
4.3.1 Overview	22
4.3.2 Belgium	22
4.3.3 The Netherlands	24
4.3.4 Luxembourg	25
4.4 OFFICE EQUIPMENT TRENDS	26
4.4.1 Overview	26
Belgium	27
Netherlands.....	27
4.4.2 Personal Computers.....	28
4.4.3 Mono Laser Printers	32
4.4.4 Colour Laser Printers	33
4.4.5 Inkjet Printers	33
4.4.6 Developments In Office Technology.....	34
E-Mail.....	34
Internet	34

Other Trends	37
4.5 PURCHASING TRENDS	38
4.5.1 Homes/Private Users	38
4.5.2 Small Offices	38
4.5.3 Large Offices	39
4.5.4 EOS & Stationery	39
5. DISTRIBUTION	41
5.1 DIRECT SALES FROM MANUFACTURERS	41
5.2 OFFICE PRODUCTS WHOLESALERS	41
5.2.1 Overview	41
5.2.2 Products	42
5.2.3 Prospects	42
5.2.4 Key Players	43
Others	43
5.3 CONTRACT STATIONERS	44
5.3.1 Products	44
5.3.2 Prospects	45
5.3.3 Key Players	45
5.4 OTHER OFFICE PRODUCTS DEALERS & DEALER GROUPS	47
5.4.1 Overview	47
5.4.2 Products	47
5.4.3 Prospects	48
5.4.4 Key Players	48
5.5 MAIL ORDER COMPANIES	49
5.5.1 Overview	49
5.5.2 Products	49
5.5.3 Prospects	50
5.5.4 Key Players	50
5.6 OFFICE SUPERSTORES	52
5.6.1 Overview	52
5.6.2 Products	52
5.6.3 Prospects	53
5.6.4 Key Players	53
5.7 ORIGINAL EQUIPMENT MANUFACTURERS (OEMS)	54
5.7.0 Overview	54
5.7.1 Products	54
5.7.2 Prospects	54
5.7.3 Key Players	55
5.8 CONSUMABLES MASTER DISTRIBUTORS	57
5.8.1 Overview	57
5.8.2 Products	57
5.8.3 Prospects	57
5.8.4 Key Players	58
5.9 CONSUMABLES SPECIALISTS	60
5.10 COMPUTER MAIL ORDER COMPANIES	60
5.10.1 Overview	60
5.10.2 Products	61
5.10.3 Prospects	61
5.10.4 Key Players	61
5.11 HARDWARE DEALERS	62
5.11.1 Overview	62
5.11.2 Products	63
5.11.3 Prospects	63
5.11.4 Key Players	63
5.12 PAPER MERCHANTS	64
5.12.1 Overview	64
5.12.2 Products	64
5.12.3 Prospects	64
5.12.4 Key Players	65

5.13	HIGH STREET RETAILERS.....	67
5.13.1	Overview.....	67
5.13.2	Products.....	67
5.13.3	Prospects.....	68
5.13.4	Key Players.....	68
5.14	E-TAILERS.....	69
5.14.1	Overview.....	69
5.14.2	Products.....	70
5.14.3	Prospects.....	70
5.14.4	Key Players.....	70
5.15	DISTRIBUTION CHANNEL SHARES.....	71
6.	COMMERCIAL ENVELOPES.....	73
6.1	MARKET SIZE & GROWTH.....	73
6.2	MARKET SEGMENTS.....	74
6.2.1	Bankers & Pockets.....	74
6.2.2	Size.....	74
6.2.3	Colour.....	74
6.2.4	Seal Method.....	75
6.2.5	Windowed/Non-Windowed.....	75
6.3	MANUFACTURERS.....	75
6.4	DISTRIBUTION.....	77
6.5	MARKET FORECAST.....	78
7.	BOOKS & PADS.....	81
7.1	MARKET SIZE & GROWTH.....	81
7.2	MARKET SEGMENTS.....	82
7.2.1	Exercise Books.....	82
7.2.2	Memo & Refill Pads.....	82
7.2.3	Duplicate & Triplicate Books.....	82
7.2.4	Manuscript Books.....	83
7.2.5	Analysis Books.....	83
7.3	MANUFACTURERS.....	84
7.4	DISTRIBUTION.....	86
7.5	MARKET FORECAST.....	87
8.	CUT OFFICE PAPER.....	89
8.1	MARKET SIZE & GROWTH.....	89
8.2	MARKET SEGMENTS.....	91
8.2.1	Copier/Laser Grades.....	91
8.2.2	Top Quality Writings.....	91
8.2.3	Specialist Coated Inkjet Papers.....	92
8.2.4	Offset & Duplicator Papers.....	92
8.3	KEY MANUFACTURERS & BRANDS.....	93
8.3.1	Copier/Laser Grades.....	93
8.3.2	Top Quality Writings.....	95
8.3.3	Specialist Coated Inkjet Papers.....	97
8.4	DISTRIBUTION.....	97
8.5	MARKET FORECAST.....	99
9.	WRITING & GRAPHIC SUPPLIES.....	101
9.1	MARKET SIZE & GROWTH.....	101
9.2	MARKET SEGMENTS.....	102
9.2.1	Pencils.....	102
9.2.2	Ballpoints.....	103
9.2.3	Rollerballs.....	103
9.2.4	Gel Ink Pens.....	104
9.2.5	Liquid Ink Pens.....	104
9.2.6	Fountain Pens.....	105
9.2.7	Fibre & Plastic Tip Pens.....	105

9.2.8	<i>Highlighters</i>	105
9.2.9	<i>Markers</i>	106
9.2.10	<i>Refills</i>	106
9.2.11	<i>Erasers</i>	107
9.2.12	<i>Correction Aids</i>	107
9.2.13	<i>Pencil Sharpeners</i>	108
9.2.14	<i>Rulers</i>	108
9.3	KEY MANUFACTURERS & BRANDS	108
9.4	DISTRIBUTION	111
9.5	MARKET FORECAST	112
10.	STORAGE & FILING PRODUCTS	115
10.1	MARKET SIZE & GROWTH	115
10.2	SEGMENT TRENDS	116
10.2.1	<i>Manila Files</i>	116
10.2.2	<i>Expanding Files</i>	116
10.2.3	<i>Soft Plastic Filing & Display Books</i>	117
10.2.4	<i>Suspension Files</i>	117
10.2.5	<i>Ring Binders</i>	118
10.2.6	<i>Lever Arch Files</i>	118
10.2.7	<i>Archival Filing</i>	118
10.2.8	<i>Indexes & Dividers</i>	119
10.3	MANUFACTURERS	119
10.4	DISTRIBUTION	123
10.5	MARKET FORECAST	124
11.	ELECTRONIC OFFICE SUPPLIES	125
11.1	MARKET SUMMARY	125
11.2	MARKET SEGMENTS	125
11.2.1	<i>Non-Impact Printing Supplies</i>	125
	Market Size & Growth	125
	Market Segments	126
	Manufacturers	127
	Distribution	131
	Market Forecast	132
11.2.2	<i>Data Storage Media</i>	133
	Market Size & Growth	133
	Market Segments	133
	Manufacturers	135
	Distribution	137
	Market Forecast	138
11.2.3	<i>Output Media</i>	139
	Market Size & Growth	139
	Market Segments	139
	Manufacturers	142
	Distribution	144
	Market Forecast	144
11.2.4	<i>Computer Filing Products & Accessories</i>	145
	Market Size & Growth	145
	Market Segments	146
	Manufacturers	149
	Distribution	151
	Market Forecast	152
11.2.5	<i>Computer Peripherals</i>	153
	Market Size & Growth	153
	Market Segments	154
	Manufacturers	155
	Distribution	156
	Market Forecast	156
11.3	DISTRIBUTION SUMMARY	157
11.4	MARKET FORECAST SUMMARY	158
12.	OFFICE & DESK ACCESSORIES	159

12.1	MARKET SIZE & GROWTH.....	159
12.2	MARKET SEGMENTS.....	160
12.2.1	<i>Adhesive Tapes.....</i>	160
12.2.2	<i>Repositionable Notes.....</i>	160
12.2.3	<i>Paper & Card Adhesives.....</i>	160
12.2.4	<i>Scissors.....</i>	161
12.2.5	<i>Staplers, Staples & Staples Extractors.....</i>	161
12.2.6	<i>Punches.....</i>	162
12.2.7	<i>Guillotines & Trimmers.....</i>	162
12.2.8	<i>Letter Trays/Racks.....</i>	163
12.2.9	<i>Waste Bins.....</i>	163
12.2.10	<i>Rubber Bands, Pins, Clips & Fasteners.....</i>	163
12.3	MANUFACTURERS.....	164
12.4	DISTRIBUTION.....	168
12.5	MARKET FORECAST.....	169
13.	PRESENTATION & PLANNING.....	171
13.1	MARKET SIZE & GROWTH.....	171
13.2	MARKET SEGMENTS.....	172
13.2.1	<i>Year Planners & Planning Boards.....</i>	172
13.2.2	<i>Wallboards & Cork Boards.....</i>	172
13.2.3	<i>Flipcharts & Accessories.....</i>	173
13.2.4	<i>Stock Diaries & Planners.....</i>	173
13.3	MANUFACTURERS.....	174
	Manufacturers of Planning boards, Wallboards, Flipcharts and Accessories:.....	175
	Manufacturers of Stock Diaries & Planners:.....	176
13.4	DISTRIBUTION.....	177
13.5	MARKET FORECAST.....	178
14.	OFFICE FURNITURE.....	181
14.1	MARKET SIZE & GROWTH.....	181
14.2	MARKET SEGMENTS.....	182
14.2.1	<i>Seating.....</i>	182
14.2.2	<i>Desking.....</i>	183
14.2.3	<i>Storage.....</i>	183
14.2.4	<i>Computer Trolleys.....</i>	183
14.2.5	<i>Screens.....</i>	184
14.3	MANUFACTURERS.....	185
14.4	DISTRIBUTION.....	187
14.5	MARKET FORECAST.....	188
15.	THE FUTURE.....	191
15.1	USER TRENDS.....	191
15.1.1	<i>Economic Forecasts.....</i>	191
	Belgium.....	191
	The Netherlands.....	191
	Luxembourg.....	192
15.1.2	<i>Demographics.....</i>	192
15.1.3	<i>Office Technology.....</i>	193
15.2	PRODUCT MARKET TRENDS.....	194
15.3	DISTRIBUTION CHANNEL TRENDS.....	194

TABLE OF TABLES

1. INTRODUCTION.....	1
1.1 BACKGROUND TO THE STUDY	1
1.2 OBJECTIVES OF THE STUDY	1
1.3 SCOPE	2
1.3.1 <i>Products</i>	2
Product Sector Coverage	2
1.3.2 <i>Base Year</i>	2
1.4 METHODOLOGY	3
1.4.1 <i>Overview</i>	3
1.4.2 <i>Desk Research</i>	3
1.4.3 <i>Manufacturer and Distributor Interviews</i>	3
1.4.4 <i>Analysis and Reporting</i>	3
1.5 DEFINITIONS.....	4
Definitions	4
1.6 EXCHANGE RATES	4
Exchange Rates at October, 2003	4
Exchange Rates at October, 2004	5
2. MARKET SUMMARY	7
The Benelux Office Products Market, 2003-2004 (€n MSP).....	7
The Benelux Office Products Market, 2004	7
3. ECONOMIC BACKGROUND.....	9
3.1 BASIC ECONOMIC INDICATORS.....	9
3.1.1 <i>Belgium</i>	9
Basic Belgian Economic Indicators, 2002-2004 (% Change pa)	9
3.1.2 <i>The Netherlands</i>	10
Basic Dutch Economic Indicators, 2002-2004 (% Change pa)	10
3.1.3 <i>Luxembourg</i>	11
Basic Luxembourg Economic Indicators, 2002-2004 (% Change pa)	11
3.2 FORECASTS	11
3.2.1 <i>Belgium</i>	11
Basic Belgian Economic Indicators, 2005-2006 (% Change pa)	11
3.2.2 <i>The Netherlands</i>	12
Basic Dutch Economic Indicators, 2005-2006 (% Change pa)	12
3.2.3 <i>Luxembourg</i>	12
Basic Luxembourg Economic Indicators, 2005-2006 (% Change pa)	12
4. USER TRENDS.....	13
4.1 POPULATION TRENDS	13
4.1.1 <i>Overview</i>	13
Benelux Population, 2002-2020	13
Benelux Population, by Age Group, 2004	13
4.1.2 <i>Belgium</i>	14
Belgian Population, 2002-2020	14
Belgian Population, by Age Group, 2004	14
4.1.3 <i>The Netherlands</i>	15
Dutch Population, 2002-2020	15
Dutch Population, by Age Group, 2004	15
4.1.4 <i>Luxembourg</i>	16
Luxembourg Population, 2002-2020	16
Luxembourg Population, by Age Group, 2004	16
4.2 EMPLOYMENT TRENDS.....	17
4.2.1 <i>Overview</i>	17
Employment Levels in Benelux, 2002-2004 (Thousands).....	17
Benelux Employment by Country, 2004	17
Benelux Employment by Broad Industrial Sector, 2002-2003* (%).....	18
4.2.2 <i>Belgium</i>	18

Employment Levels in Belgium, 2002-2004 (Thousands)	18
Belgian Employment, by Region, 2003*	19
Belgian Employment by Broad Industrial Sector, 2002-2004 (%)	19
4.2.3 <i>The Netherlands</i>	19
Employment Levels in the Netherlands, 2002-2004 (Thousands)	19
Dutch Employment by Region, 2003*	20
Dutch Employment by Broad Industrial Sector, 2002-2003 (%) *	20
4.2.4 <i>Luxembourg</i>	21
Employment Levels in Luxembourg, 2002-2004 (Thousands)	21
Luxembourg Employment by Broad Industrial Sector, 2002-2004(%)	21
4.3 BUSINESS TRENDS	22
4.3.1 <i>Overview</i>	22
Number of Companies in Benelux, 2001-2003*	22
4.3.2 <i>Belgium</i>	22
Number of Companies in Belgium, 2001-2003*	22
Number of Companies in Belgium, by Activity, 2001-2002* (% Base)	23
Number of Enterprises in Belgium, by Size, 2002*	23
4.3.3 <i>The Netherlands</i>	24
Number of Companies in the Netherlands, 2001-2003*	24
Number of Companies in the Netherlands, by Activity, 2001-2003 (% Base)*	24
Number of Enterprises in the Netherlands, by Size, 2002*	24
4.3.4 <i>Luxembourg</i>	25
Number of Companies in Luxembourg, 2001-2003*	25
Number of Companies in Luxembourg, by Activity, 2002-2003 (% Base)	25
Number of Enterprises in Luxembourg, by Size, 2002*	25
4.4 OFFICE EQUIPMENT TRENDS	26
4.4.1 <i>Overview</i>	26
Office Equipment Installed Bases in Benelux, 2002-2009 (Thousands)	26
Office Printer Installed Bases in Belgium, 2002-2009 (Thousands)	27
Office Printer Installed Bases in the Netherlands, 2002-2009 (Thousands)	27
4.4.2 <i>Personal Computers</i>	28
PC Penetration By Country/Region 2004	28
Benelux IT Market Shipments 2002-2006 (Units)	29
Benelux IT Market Shipments 2003-2007 (% Change pa)	29
Belgium/Luxembourg IT Market Shipments 2002-2006 (Units)	30
Belgium/Luxembourg IT Market Shipments 2003-2006 (% Change pa)	30
Netherlands IT Market Shipments 2002-2006 (Units)	31
Netherlands IT Market Shipments 2003-2006 (% Change pa)	31
Evolution Of Average European PC Selling Prices 2000-2006 (€)	32
4.4.3 <i>Mono Laser Printers</i>	32
Share of Mono Laser Printer Installed Base in Benelux, 2004	33
4.4.4 <i>Colour Laser Printers</i>	33
Share of Colour Laser Printer Installed Base in Benelux, 2004	33
4.4.5 <i>Inkjet Printers</i>	33
Share of Inkjet Printer Installed Base in Benelux, 2004	34
4.4.6 <i>Developments In Office Technology</i>	34
Wire Based Internet Users 2003-2007 (Thousands)	35
Web Users 2004-2008	36
Number Of Broadband Connections 2004 (Thousands)	36
Internet Hosts Worldwide, 1998-2004 (millions)	37
Bluetooth & WLAN-Enabled Devices 2000-2008 (millions)	37
Digital Still Camera & Camcorder Sales in Western Europe, 2001-2005 (000 Units)	38
4.5 PURCHASING TRENDS	38
4.5.1 <i>Homes/Private Users</i>	38
4.5.2 <i>Small Offices</i>	38
4.5.3 <i>Large Offices</i>	39
4.5.4 <i>EOS & Stationery</i>	39
5. DISTRIBUTION	41
5.1 DIRECT SALES FROM MANUFACTURERS	41
5.2 OFFICE PRODUCTS WHOLESALERS	41
5.2.1 <i>Overview</i>	41
5.2.2 <i>Products</i>	42
5.2.3 <i>Prospects</i>	42

5.2.4	Key Players	43
	Major Benelux Office Products Wholesaler, 2004	43
5.3	CONTRACT STATIONERS	44
5.3.1	Products	44
5.3.2	Prospects.....	45
5.3.3	Key Players	45
	Major Benelux Contract Stationers, 2004.....	45
5.4	OTHER OFFICE PRODUCTS DEALERS & DEALER GROUPS.....	47
5.4.1	Overview	47
5.4.2	Products	47
5.4.3	Prospects.....	48
5.4.4	Key Players	48
	Major Benelux Dealer Groups, 2004.....	48
5.5	MAIL ORDER COMPANIES	49
5.5.1	Overview	49
5.5.2	Products	49
5.5.3	Prospects.....	50
5.5.4	Key Players	50
	Major Benelux Mail Order Companies, 2004.....	50
5.6	OFFICE SUPERSTORES	52
5.6.1	Overview	52
5.6.2	Products	52
5.6.3	Prospects.....	53
5.6.4	Key Players	53
	Major Benelux Office Superstores, 2004.....	53
5.7	ORIGINAL EQUIPMENT MANUFACTURERS (OEMS).....	54
5.7.0	Overview	54
5.7.1	Products	54
5.7.2	Prospects.....	54
5.7.3	Key Players	55
	Major Benelux OEMs, 2004.....	55
5.8	CONSUMABLES MASTER DISTRIBUTORS	57
5.8.1	Overview	57
5.8.2	Products	57
5.8.3	Prospects.....	57
5.8.4	Key Players	58
	Major Benelux Consumables Master Distributors, 2004	58
5.9	CONSUMABLES SPECIALISTS.....	60
5.10	COMPUTER MAIL ORDER COMPANIES	60
5.10.1	Overview	60
5.10.2	Products	61
5.10.3	Prospects.....	61
5.10.4	Key Players	61
	Major Benelux Computer Mail Order Companies, 2004	61
5.11	HARDWARE DEALERS.....	62
5.11.1	Overview	62
5.11.2	Products	63
5.11.3	Prospects.....	63
5.11.4	Key Players	63
	Major Benelux Hardware Dealers, 2004.....	63
5.12	PAPER MERCHANTS.....	64
5.12.1	Overview	64
5.12.2	Products	64
5.12.3	Prospects.....	64
5.12.4	Key Players	65
	Major Benelux Paper Merchants, 2004	65
5.13	HIGH STREET RETAILERS.....	67
5.13.1	Overview	67
5.13.2	Products	67
5.13.3	Prospects.....	68
5.13.4	Key Players	68

Major Benelux Retailers, 2004	68
5.14 E-TAILERS	69
5.14.1 <i>Overview</i>	69
5.14.2 <i>Products</i>	70
5.14.3 <i>Prospects</i>	70
5.14.4 <i>Key Players</i>	70
5.15 DISTRIBUTION CHANNEL SHARES.....	71
Channel Shares of the Benelux Office Products Market, 2004.....	71
6. COMMERCIAL ENVELOPES.....	73
6.1 MARKET SIZE & GROWTH.....	73
Benelux Letter Post Traffic Volumes, 2001-2003* (millions).....	73
The Benelux Commercial Envelope Market, 2003-2004 (€n at MSP)	74
6.2 MARKET SEGMENTS.....	74
6.2.1 <i>Bankers & Pockets</i>	74
6.2.2 <i>Size</i>	74
6.2.3 <i>Colour</i>	74
6.2.4 <i>Seal Method</i>	75
6.2.5 <i>Windowed/Non-Windowed</i>	75
6.3 MANUFACTURERS	75
Key Manufacturers Supplying the Benelux Commercial Envelope Market, 2004 (€n at MSP).....	75
6.4 DISTRIBUTION.....	77
Manufacturer Sales of Commercial Envelopes, by Channel, 2004.....	78
User Purchases of Commercial Envelopes, by Channel, 2004	78
6.5 MARKET FORECAST	78
The Benelux Commercial Envelopes Market, 2004-2009 (€n at MSP).....	79
7. BOOKS & PADS.....	81
7.1 MARKET SIZE & GROWTH.....	81
The Benelux Books & Pads Market, 2003-2004 (€n at MSP)	81
7.2 MARKET SEGMENTS.....	82
7.2.1 <i>Exercise Books</i>	82
7.2.2 <i>Memo & Refill Pads</i>	82
7.2.3 <i>Duplicate & Triplicate Books</i>	82
7.2.4 <i>Manuscript Books</i>	83
7.2.5 <i>Analysis Books</i>	83
7.3 MANUFACTURERS	84
Key Manufacturers Supplying the Benelux Books & Pads Market, 2004 (€n at MSP).....	84
7.4 DISTRIBUTION.....	86
Manufacturer Sales of Books & Pads, by Channel, 2004	86
User Purchases of Books & Pads, by Channel, 2004.....	87
7.5 MARKET FORECAST	87
The Benelux Books & Pads Market, 2004-2009 (€n at MSP).....	88
8. CUT OFFICE PAPER.....	89
8.1 MARKET SIZE & GROWTH.....	89
The Benelux Cut Office Paper Market, 2003-2004 (Thousand Tonnes)	89
European Uncoated Woodfree Paper Prices, 2001-2004 (value/tonne).....	90
The Benelux Cut Office Paper Market, 2003-2004 (€n at MSP).....	90
8.2 MARKET SEGMENTS.....	91
8.2.1 <i>Copier/Laser Grades</i>	91
8.2.2 <i>Top Quality Writings</i>	91
8.2.3 <i>Specialist Coated Inkjet Papers</i>	92
8.2.4 <i>Offset & Duplicator Papers</i>	92
8.3 KEY MANUFACTURERS & BRANDS	93
8.3.1 <i>Copier/Laser Grades</i>	93
Major Brands of Copier Paper in the Benelux Market, 2004.....	93
8.3.2 <i>Top Quality Writings</i>	95
Major Brands of Top Quality Writing Paper in the Benelux Market, 2004.....	95
8.3.3 <i>Specialist Coated Inkjet Papers</i>	97
Major Brands of Specialist Inkjet Paper in the Benelux Market, 2004.....	97
8.4 DISTRIBUTION.....	97

	Manufacturer Sales of Cut Office Paper, by Channel, 2004	98
	User Purchases of Cut Office Paper, by Channel, 2004	98
8.5	MARKET FORECAST	99
	The Benelux Cut Office Paper Market, 2004-2009 (€m at MSP)	99
9.	WRITING & GRAPHIC SUPPLIES	101
9.1	MARKET SIZE & GROWTH	101
	The Benelux Writing & Graphic Supplies Market, 2003-2004 (€m at MSP)	102
9.2	MARKET SEGMENTS	102
9.2.1	<i>Pencils</i>	102
9.2.2	<i>Ballpoints</i>	103
9.2.3	<i>Rollerballs</i>	103
9.2.4	<i>Gel Ink Pens</i>	104
9.2.5	<i>Liquid Ink Pens</i>	104
9.2.6	<i>Fountain Pens</i>	105
9.2.7	<i>Fibre & Plastic Tip Pens</i>	105
9.2.8	<i>Highlighters</i>	105
9.2.9	<i>Markers</i>	106
9.2.10	<i>Refills</i>	106
9.2.11	<i>Erasers</i>	107
9.2.12	<i>Correction Aids</i>	107
9.2.13	<i>Pencil Sharpeners</i>	108
9.2.14	<i>Rulers</i>	108
9.3	KEY MANUFACTURERS & BRANDS	108
	Key Manufacturers Supplying the Benelux Writing & Graphic Supplies Market, 2004 (€m at MSP)	108
9.4	DISTRIBUTION	111
	Manufacturer Sales of Writing & Graphic Supplies, by Channel, 2004	112
	User Purchases of Writing & Graphic Supplies, by Channel, 2004	112
9.5	MARKET FORECAST	112
	The Benelux Writing & Graphic Supplies Market, 2004-2009 (€m at MSP)	113
10.	STORAGE & FILING PRODUCTS	115
10.1	MARKET SIZE & GROWTH	115
	The Benelux Storage & Filing Products Market, 2003-2004 (€m at MSP)	116
10.2	SEGMENT TRENDS	116
10.2.1	<i>Manila Files</i>	116
10.2.2	<i>Expanding Files</i>	116
10.2.3	<i>Soft Plastic Filing & Display Books</i>	117
10.2.4	<i>Suspension Files</i>	117
10.2.5	<i>Ring Binders</i>	118
10.2.6	<i>Lever Arch Files</i>	118
10.2.7	<i>Archival Filing</i>	118
10.2.8	<i>Indexes & Dividers</i>	119
10.3	MANUFACTURERS	119
	Key Manufacturers Supplying the Benelux Storage & Filing Products Market, 2004 (€m at MSP)	119
10.4	DISTRIBUTION	123
	Manufacturer Sales of Storage & Filing Products, by Channel, 2004	123
	User Purchases of Storage & Filing Products, by Channel, 2004	123
10.5	MARKET FORECAST	124
	The Benelux Storage & Filing Products Market, 2004-2009 (€m at MSP)	124
11.	ELECTRONIC OFFICE SUPPLIES	125
11.1	MARKET SUMMARY	125
	The Benelux EOS Market, 2003-2004 (€m MSP)	125
11.2	MARKET SEGMENTS	125
11.2.1	<i>Non-Impact Printing Supplies</i>	125
	The Benelux Non-Impact Printing Supplies Market, 2003-2004 (€m MSP)	126
	Major Benelux Mono Laser Toner Cartridge Remanufacturers, 2004	127
	Major Benelux Non-Original Colour Laser Toner Cartridge Manufacturers, 2004	129
	Major Benelux Compatible & Refilled Inkjet Cartridge Suppliers, 2004	130
	The Benelux Non-Impact Printing Supplies Market, 2004-2009 (€m at MSP)	132
11.2.2	<i>Data Storage Media</i>	133

The Benelux Data Storage Media Market, 2003-2004 (€m MSP).....	133
Key Manufacturers Supplying the Benelux Data Storage Media Market, 2004 (€m at MSP).....	136
The Benelux Data Storage Media Market, 2004-2009 (€m at MSP).....	139
11.2.3 <i>Output Media</i>	139
The Benelux Output Media Market, 2003-2004 (€m MSP).....	139
The Benelux Transparency Market, 2003-2004 (€m MSP).....	140
The Benelux Office Label Market, 2003-2004 (€m MSP).....	141
Key Manufacturers Supplying the Benelux Transparency Market, 2004 (€m at MSP).....	142
Key Manufacturers Supplying the Benelux Office Label Market, 2004 (€m at MSP).....	143
The Benelux Output Media Market, 2004-2009 (€m at MSP).....	145
11.2.4 <i>Computer Filing Products & Accessories</i>	145
The Benelux Computer Filing Products & Accessories Market, 2003-2004 (€m MSP).....	146
Key Manufacturers Supplying the Benelux Computer Filing Products & Accessories Market, 2004.....	149
The Benelux Computer Filing Products & Accessories Market, 2004-2009 (€m at MSP).....	153
11.2.5 <i>Computer Peripherals</i>	153
The Benelux Computer Peripherals Market, 2003-2004 (€m MSP).....	153
Key Manufacturers Supplying the Benelux Computer Peripherals Market, 2004.....	155
The Benelux Computer Peripherals Market, 2004-2009 (€m at MSP).....	156
11.3 DISTRIBUTION SUMMARY	157
Manufacturer Sales of EOS, by Channel, 2004.....	157
User Purchases of EOS, by Channel, 2004.....	157
11.4 MARKET FORECAST SUMMARY	158
The Benelux EOS Market, 2004-2009 (€m at MSP).....	158
12. OFFICE & DESK ACCESSORIES	159
12.1 MARKET SIZE & GROWTH	159
The Benelux Office & Desk Accessories Market, 2003-2004 (€m at MSP).....	159
12.2 MARKET SEGMENTS	160
12.2.1 <i>Adhesive Tapes</i>	160
12.2.2 <i>Repositionable Notes</i>	160
12.2.3 <i>Paper & Card Adhesives</i>	160
12.2.4 <i>Scissors</i>	161
12.2.5 <i>Staplers, Staples & Staples Extractors</i>	161
12.2.6 <i>Punches</i>	162
12.2.7 <i>Guillotines & Trimmers</i>	162
12.2.8 <i>Letter Trays/Racks</i>	163
12.2.9 <i>Waste Bins</i>	163
12.2.10 <i>Rubber Bands, Pins, Clips & Fasteners</i>	163
12.3 MANUFACTURERS	164
Key Manufacturers Supplying the Benelux Office & Desk Accessories Market, 2004.....	164
12.4 DISTRIBUTION	168
Manufacturer Sales of Office & Desk Accessories, by Channel, 2004.....	168
User Purchases of Office & Desk Accessories, by Channel, 2004.....	169
12.5 MARKET FORECAST	169
The Benelux Office & Desk Accessories Market, 2004-2009 (€m at MSP).....	170
13. PRESENTATION & PLANNING	171
13.1 MARKET SIZE & GROWTH	171
The Benelux Presentation & Planning Market, 2003-2004 (€m at MSP).....	171
13.2 MARKET SEGMENTS	172
13.2.1 <i>Year Planners & Planning Boards</i>	172
13.2.2 <i>Wallboards & Cork Boards</i>	172
13.2.3 <i>Flipcharts & Accessories</i>	173
13.2.4 <i>Stock Diaries & Planners</i>	173
13.3 MANUFACTURERS	174
Key Manufacturers Supplying the Benelux Presentation & Planning Market, 2004 (€m at MSP).....	174
13.4 DISTRIBUTION	177
Manufacturer Sales of Presentation & Planning Products, by Channel, 2004.....	177
User Purchases of Presentation & Planning Products, by Channel, 2004.....	178
13.5 MARKET FORECAST	178
The Benelux Presentation & Planning Market, 2004-2009 (€m at MSP).....	179
14. OFFICE FURNITURE	181

14.1	MARKET SIZE & GROWTH.....	181
	The Office Furniture Market, 2003-2004 (€m at MSP).....	182
14.2	MARKET SEGMENTS.....	182
14.2.1	<i>Seating</i>	182
14.2.2	<i>Desking</i>	183
14.2.3	<i>Storage</i>	183
14.2.4	<i>Computer Trolleys</i>	183
14.2.5	<i>Screens</i>	184
14.3	MANUFACTURERS.....	185
	Key Manufacturers Supplying the Benelux Office Furniture Market, 2004 (€m at MSP).....	185
14.4	DISTRIBUTION.....	187
	Manufacturer Sales of Office Furniture, by Channel, 2004.....	187
	User Purchases of Office Furniture, by Channel, 2004.....	188
14.5	MARKET FORECAST.....	188
	The Benelux Office Furniture Market, 2004-2009 (€m at MSP).....	189
15.	THE FUTURE.....	191
15.1	USER TRENDS.....	191
15.1.1	<i>Economic Forecasts</i>	191
	Basic Belgian Economic Indicators, 2005-2006 (% Change pa).....	191
	Basic Dutch Economic Indicators, 2005-2006 (% Change pa).....	191
	Basic Luxembourg Economic Indicators, 2005-2006 (% Change pa).....	192
15.1.2	<i>Demographics</i>	192
	Benelux Population, 2002-2020.....	192
15.1.3	<i>Office Technology</i>	193
15.2	PRODUCT MARKET TRENDS.....	194
	The Benelux Office Products Market, 2004-2009 (€m at MSP).....	194
15.3	DISTRIBUTION CHANNEL TRENDS.....	194
	Unadjusted Channel Shares of the Benelux Office Products Market, 2004-2009 (% Share).....	195
	Adjusted Channel Shares of the Benelux Office Products Market, 2004-2009 (% Share).....	197