



# **THE ITALIAN OFFICE PRODUCTS MARKET 2007-2012**

**MPA International**

**February 2008**

CP House, 97-107 Uxbridge Road, Ealing London, W5 5LT  
Phone: +44 (0) 20 8832 7770 Fax: +44 (0) 20 8566 4931  
Email: [mpa@brg.co.uk](mailto:mpa@brg.co.uk)  
Website: [www.mpainternational.com](http://www.mpainternational.com)

---

## **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**

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](http://www.mpainternational.com)**

# CONTENTS

<b>1.</b>	<b>INTRODUCTION</b> .....	1
1.1	BACKGROUND TO THE STUDY .....	1
1.2	OBJECTIVES OF THE STUDY .....	1
1.3	SCOPE .....	1
1.3.1	Products .....	2
1.3.2	Base Year .....	3
1.4	METHODOLOGY .....	3
1.4.1	Overview .....	3
1.4.2	Desk Research .....	4
1.4.3	Manufacturer and Distributor Interviews .....	4
1.4.4	Analysis and Reporting .....	4
1.5	DEFINITIONS .....	4
1.6	EXCHANGE RATES .....	4
<b>2.</b>	<b>MARKET SUMMARY</b> .....	7
<b>3.</b>	<b>ECONOMIC BACKGROUND</b> .....	11
3.1	BASIC ECONOMIC INDICATORS .....	11
3.2	FORECASTS .....	11
<b>4.</b>	<b>USER TRENDS</b> .....	13
4.1	POPULATION TRENDS .....	13
4.2	EMPLOYMENT TRENDS .....	14
4.3	OFFICE EQUIPMENT TRENDS .....	15
4.3.1	Personal Computers .....	15
4.3.2	Developments In Office Technology .....	18
4.3.2.1	E-Mail .....	18
4.3.2.2	Internet .....	18
4.4	PURCHASING TRENDS .....	20
4.4.1	Homes/Private Users .....	20
4.4.2	Small Offices .....	20
4.4.3	Large Offices .....	20
4.4.4	Computer Accessories & Stationery .....	21
<b>5.</b>	<b>DISTRIBUTION</b> .....	23
5.1	DIRECT SALES FROM MANUFACTURERS .....	23
5.2	OFFICE PRODUCTS WHOLESALERS .....	23
5.2.1	Overview .....	23
5.2.2	Products .....	24
5.2.3	Prospects .....	24
5.2.4	Key Players .....	24
5.3	CONTRACT STATIONERS .....	25
5.3.1	Overview .....	25
5.3.2	Products .....	25
5.3.3	Prospects .....	26
5.3.4	Key Players .....	26

5.4	OTHER OFFICE PRODUCTS DEALERS & DEALER GROUPS .....	26
5.4.1	Overview .....	26
5.4.2	Products .....	27
5.4.3	Prospects .....	27
5.4.4	Key Players .....	27
5.5	MAIL ORDER COMPANIES .....	27
5.5.1	Overview .....	27
5.5.2	Products .....	28
5.5.3	Prospects .....	28
5.5.4	Key Players .....	28
5.6	OFFICE SUPERSTORES .....	29
5.6.1	Overview .....	29
5.6.2	Products .....	29
5.6.3	Prospects .....	29
5.6.4	Key Players .....	29
5.7	ORIGINAL EQUIPMENT MANUFACTURERS (OEMS) .....	30
5.8	CONSUMABLES MASTER DISTRIBUTORS .....	30
5.8.1	Overview .....	30
5.8.2	Products .....	30
5.8.3	Prospects .....	31
5.8.4	Key Players .....	31
5.9	COMPUTER MAIL ORDER COMPANIES .....	31
5.10	PAPER MERCHANTS .....	31
5.10.1	Overview .....	31
5.10.2	Products .....	32
5.10.3	Prospects .....	32
5.11	HIGH STREET RETAILERS .....	32
5.11.1	Stationery Retailers .....	32
5.11.2	Hypermarkets, Supermarkets & Department Stores .....	33
5.12	E-TAILERS .....	34
5.12.1	Overview .....	34
5.12.2	Products .....	34
5.12.3	Prospects .....	34
5.12.4	Key Players .....	34
5.13	DISTRIBUTION CHANNEL SHARES .....	34
<b>6.</b>	<b>COMMERCIAL ENVELOPES .....</b>	<b>37</b>
6.1	MARKET SIZE & GROWTH .....	37
6.2	MARKET SEGMENTS .....	39
6.2.1	Bankers & Pockets .....	39
6.2.2	Size & Weight .....	39
6.2.3	Colour .....	39
6.2.4	Seal Method .....	39
6.2.5	Windowed/Non-Windowed .....	39
6.3	MANUFACTURERS .....	40
6.4	DISTRIBUTION .....	42
6.5	MARKET FORECAST .....	45
<b>7.</b>	<b>BOOKS &amp; PADS .....</b>	<b>47</b>

7.1	MARKET SIZE & GROWTH .....	47
7.2	MARKET SEGMENTS .....	49
7.2.1	Exercise Books .....	49
7.2.2	Memo & Refill Pads .....	49
7.2.3	Duplicate & Triplicate Books .....	50
7.2.4	Manuscript Books .....	50
7.2.5	Analysis Books .....	50
7.3	MANUFACTURERS .....	50
7.4	DISTRIBUTION .....	52
7.5	MARKET FORECAST .....	55
<b>8.</b>	<b>CUT OFFICE PAPER .....</b>	<b>57</b>
8.1	MARKET SIZE & GROWTH .....	57
8.2	MARKET SEGMENTS .....	59
8.2.1	Copier/Laser Grades .....	59
8.2.2	Top Quality Writings .....	59
8.2.3	Specialist Coated Inkjet Papers .....	60
8.2.4	Office Labels .....	60
8.3	MANUFACTURERS .....	60
8.3.1	Copier/Laser Grades .....	60
8.3.2	Top Quality Writings .....	61
8.3.3	Specialist Coated Inkjet Papers .....	61
8.3.4	Office Labels .....	62
8.4	DISTRIBUTION .....	62
8.5	MARKET FORECAST .....	65
<b>9.</b>	<b>WRITING &amp; GRAPHIC SUPPLIES .....</b>	<b>67</b>
9.1	MARKET SIZE & GROWTH .....	67
9.2	MARKET SEGMENTS .....	69
9.2.1	Pencils .....	69
9.2.2	Ballpoints .....	69
9.2.3	Rollerballs .....	70
9.2.4	Liquid Ink Pens .....	70
9.2.5	Gel Ink Pens .....	70
9.2.6	Fountain Pens .....	71
9.2.7	Fibre & Plastic Tip Pens .....	71
9.2.8	Highlighters .....	72
9.2.9	Markers .....	72
9.2.10	Refills .....	73
9.2.11	Erasers .....	73
9.2.12	Correction Aids .....	73
9.2.13	Pencil Sharpeners .....	73
9.2.14	Rulers .....	74
9.3	MANUFACTURERS .....	74
9.4	DISTRIBUTION .....	76
9.5	MARKET FORECAST .....	79
<b>10.</b>	<b>STORAGE &amp; FILING PRODUCTS .....</b>	<b>81</b>
10.1	MARKET SIZE & GROWTH .....	81

10.2	<b>MARKET SEGMENTS</b> .....	83
10.2.1	Manila Files .....	83
10.2.2	Expanding Files .....	83
10.2.3	Soft Plastic Filing & Display Books .....	84
10.2.4	Suspension Files .....	84
10.2.5	Ring Binders .....	85
10.2.6	Lever Arch Files .....	85
10.2.7	Archival Filing .....	86
10.2.8	Indexes & Dividers .....	86
10.3	<b>KEY MANUFACTURERS</b> .....	86
10.4	<b>DISTRIBUTION</b> .....	88
10.5	<b>MARKET FORECAST</b> .....	91
<b>11.</b>	<b>COMPUTER ACCESSORIES</b> .....	93
11.1	<b>MARKET SIZE &amp; GROWTH</b> .....	93
11.2	<b>MARKET SEGMENTS</b> .....	95
11.2.1	Media Storage & CD Cases .....	95
11.2.2	Computer Cleaning Products .....	95
11.2.3	Screen Filters .....	96
11.2.4	Copyholders .....	96
11.2.5	Mouse Mats .....	96
11.2.6	Foot/Wrist Rests .....	97
11.2.7	Computer Luggage .....	97
11.3	<b>KEY MANUFACTURERS</b> .....	97
11.4	<b>DISTRIBUTION</b> .....	98
11.5	<b>MARKET FORECAST</b> .....	101
<b>12.</b>	<b>OFFICE &amp; DESK ACCESSORIES</b> .....	103
12.1	<b>MARKET SIZE &amp; GROWTH</b> .....	103
12.2	<b>MARKET SEGMENTS</b> .....	105
12.2.1	Adhesive Tapes .....	105
12.2.2	Repositionable Notes .....	105
12.2.3	Paper & Card Adhesives .....	106
12.2.4	Scissors .....	106
12.2.5	Staplers, Staples & Staples Extractors .....	106
12.2.6	Punches .....	107
12.2.7	Guillotines & Trimmers .....	108
12.2.8	Letter Trays .....	108
12.2.9	Waste Bins .....	108
12.2.10	Rubber Bands, Pins, Clips & Fasteners .....	109
12.3	<b>MANUFACTURERS</b> .....	109
12.4	<b>DISTRIBUTION</b> .....	110
12.5	<b>MARKET FORECAST</b> .....	113
<b>13.</b>	<b>PRESENTATION &amp; PLANNING</b> .....	115
13.1	<b>MARKET SIZE &amp; GROWTH</b> .....	115
13.2	<b>MARKET SEGMENTS</b> .....	117
13.2.1	Year Planners & Planning Boards .....	117
13.2.2	Wallboards & Cork Boards .....	117

13.2.3	Flipcharts & Accessories .....	118
13.2.4	Stock Diaries & Planners .....	118
13.3	MANUFACTURERS .....	118
13.4	DISTRIBUTION .....	120
13.5	MARKET FORECAST .....	123
<b>14.</b>	<b>THE FUTURE .....</b>	<b>125</b>
14.1	USER TRENDS .....	125
14.1.1	Economic Forecasts .....	125
14.1.2	Demographics .....	125
14.1.3	Office Technology .....	126
14.2	PRODUCT MARKET TRENDS .....	127
14.3	DISTRIBUTION CHANNEL TRENDS .....	129

**APPENDIX**

MANUFACTURER PROFILES

DISTRIBUTORS PROFILES

## TABLE OF TABLES

<b>1. INTRODUCTION</b>	1
1.1 BACKGROUND TO THE STUDY	1
1.2 OBJECTIVES OF THE STUDY	1
1.3 SCOPE	1
Product Sector Coverage .....	3
1.4 METHODOLOGY	3
1.5 DEFINITIONS	4
Definitions .....	4
1.6 EXCHANGE RATES	4
Exchange Rates, 2007 .....	5
Exchange Rates, 2006 .....	5
<b>2. MARKET SUMMARY</b>	7
The Italian Office Products Market, 2006-2007 (€bn at MSP) .....	8
The Italian Office Products Market, 2007 (€bn at UBP) .....	9
<b>3. ECONOMIC BACKGROUND</b>	11
3.1 BASIC ECONOMIC INDICATORS	11
Basic Italian Economic Indicators, 2004 - 2007 (% Change pa) .....	11
3.2 FORECASTS	11
Basic Italian Economic Indicators, 2007-2010 (% Change pa) .....	12
<b>4. USER TRENDS</b>	13
4.1 POPULATION TRENDS	13
Italian Population, 2002-2050 (000s) .....	13
Italian Population 2005* By Age Group (000s) .....	14
4.2 EMPLOYMENT TRENDS	14
Employment Levels In Italy 2002-2006 (000s) .....	14
Italian Employment By Broad Industrial Sector, 2002-2006 (% Share) .....	15
4.3 OFFICE EQUIPMENT TRENDS	15
PC Penetration by Country/Region, 2005 .....	16
Italy IT Market Shipments, 2004-2008 (Units) .....	17
Italy IT Market Shipments, 2004-2008 (% Change) .....	17
Evolution of Average European PC Selling Prices, 1999-2007 (€) .....	18
Web Users, 2006-2010 .....	19
Number of ADSL lines, 2006-2010 (000s) .....	19
Internet Commerce In Italy 2006-2010 (€bn) .....	20
4.4 PURCHASING TRENDS	20

<b>5. DISTRIBUTION</b>	23
5.1 DIRECT SALES FROM MANUFACTURERS	23
5.2 OFFICE PRODUCTS WHOLESALERS	23
5.3 CONTRACT STATIONERS	25
5.4 OTHER OFFICE PRODUCTS DEALERS & DEALER GROUPS	26
5.5 MAIL ORDER COMPANIES	27
5.6 OFFICE SUPERSTORES	29
5.7 ORIGINAL EQUIPMENT MANUFACTURERS (OEMS)	30
5.8 CONSUMABLES MASTER DISTRIBUTORS	30
5.9 COMPUTER MAIL ORDER COMPANIES	31
5.10 PAPER MERCHANTS	31
5.11 HIGH STREET RETAILERS	32
5.12 E-TAILERS	34
5.13 DISTRIBUTION CHANNEL SHARES	34
Channel Shares of the Italian Office Products Market, 2007 . . . . .	35
<b>6. COMMERCIAL ENVELOPES</b>	37
6.1 MARKET SIZE & GROWTH	37
Italian Letter Post Traffic Volumes, 2004-2006 (millions) . . . . .	37
The Italian Commercial Envelope Market, 2006-2007 (€m at MSP) . . . . .	38
6.2 MARKET SEGMENTS	39
6.3 MANUFACTURERS	40
Key Manufacturers Supplying the Italian Commercial Envelope Market, 2007 . . . . .	41
6.4 DISTRIBUTION	42
Manufacturer Sales of Commercial Envelopes by Channel, 2007 . . . . .	43
User Purchases of Commercial Envelopes by Channel, 2007 . . . . .	44
6.5 MARKET FORECAST	45
The Italian Commercial Envelopes Market, 2007-2012 (€m at MSP) . . . . .	46
<b>7. BOOKS &amp; PADS</b>	47
7.1 MARKET SIZE & GROWTH	47
The Italian Books & Pads Market, 2006-2007 (€m at MSP) . . . . .	48
7.2 MARKET SEGMENTS	49
7.3 MANUFACTURERS	50
Key Manufacturers Supplying the Italian Books & Pads Market, 2007 . . . . .	51
7.4 DISTRIBUTION	52
Manufacturer Sales of Books & Pads by Channel, 2007 . . . . .	53
User Purchases of Books & Pads by Channel, 2007 . . . . .	54
7.5 MARKET FORECAST	55
The Italian Books & Pads Market, 2007-2012 (€m at MSP) . . . . .	56

<b>8. CUT OFFICE PAPER</b>	57
8.1 MARKET SIZE & GROWTH	57
The Italian Cut Office Paper Market, 2006-2007 (€m at MSP) .....	58
8.2 MARKET SEGMENTS	59
8.3 MANUFACTURERS	60
Major Brands of Copier Paper in the Italian Market, 2007 .....	61
Major Brands of Top Quality Writing Paper in the Italian Market, 2007 .....	61
Major Brands of Specialist Coated Inkjet Paper in the Italian Market, 2007 .....	62
8.4 DISTRIBUTION	62
Manufacturer Sales of Cut Office Paper by Channel, 2007 .....	63
User Purchases of Cut Office Paper by Channel, 2007 .....	64
8.5 MARKET FORECAST	65
The Italian Cut Office Paper Market, 2007-2012 (€m at MSP) .....	66
<b>9. WRITING &amp; GRAPHIC SUPPLIES</b>	67
9.1 MARKET SIZE & GROWTH	67
The Italian Writing & Graphic Supplies Market, 2006-2007 (€m at MSP) .....	68
9.2 MARKET SEGMENTS	69
9.3 MANUFACTURERS	74
Key Manufacturers Supplying the Italian Writing & Graphic Supplies Market, 2007 .....	75
9.4 DISTRIBUTION	76
Manufacturer Sales of Writing & Graphic Supplies by Channel, 2007 .....	77
User Purchases of Writing & Graphic Supplies by Channel, 2007 .....	78
9.5 MARKET FORECAST	79
The Italian Writing & Graphic Supplies Market, 2007-2012 (€m at MSP) .....	80
<b>10. STORAGE &amp; FILING PRODUCTS</b>	81
10.1 MARKET SIZE & GROWTH	81
The Italian Storage & Filing Products Market, 2006-2007 (€m at MSP) .....	82
10.2 MARKET SEGMENTS	83
10.3 KEY MANUFACTURERS	86
Key Manufacturers Supplying the Italian Storage & Filing Products Market, 2007 .....	87
10.4 DISTRIBUTION	88
Manufacturer Sales of Storage & Filing Products by Channel, 2007 .....	89
User Purchases of Storage & Filing Products by Channel, 2007 .....	90
10.5 MARKET FORECAST	91
The Italian Storage & Filing Products Market, 2007-2012 (€m at MSP) .....	92
<b>11. COMPUTER ACCESSORIES</b>	93
11.1 MARKET SIZE & GROWTH	93
The Italian Computer Filing Products & Accessories Market, 2006-2007 (€m at MSP) .....	94
11.2 MARKET SEGMENTS	95
11.3 KEY MANUFACTURERS	97
Key Manufacturers Supplying the Italian Computer Accessories Market, 2007 .....	98
11.4 DISTRIBUTION	98
Manufacturer Sales of Computer Accessories by Channel, 2007 .....	99
User Purchases of Computer Accessories by Channel, 2007 .....	100
11.5 MARKET FORECAST	101
The Italian Computer Accessories Market, 2007-2012 (€m at MSP) .....	102

<b>12. OFFICE &amp; DESK ACCESSORIES</b>	<b>103</b>
12.1 MARKET SIZE & GROWTH	103
The Italian Office & Desk Accessories Market, 2006-2007 (€m at MSP) .....	104
12.2 MARKET SEGMENTS	105
12.3 MANUFACTURERS	109
Key Manufacturers Supplying the Italian Office & Desk Accessories Market, 2007 .....	109
12.4 DISTRIBUTION	110
Manufacturer Sales of Office & Desk Accessories By Channel, 2007 .....	111
User Purchases of Of Office & Desk Accessories By Channel, 2007 .....	112
12.5 MARKET FORECAST	113
The Italian Office & Desk Accesories Market, 2007-2012 (€m at MSP) .....	114
<b>13. PRESENTATION &amp; PLANNING</b>	<b>115</b>
13.1 MARKET SIZE & GROWTH	115
The Italian Presentation & Planning Market, 2006-2007 (€m at MSP) .....	116
13.2 MARKET SEGMENTS	117
13.3 MANUFACTURERS	118
Key Manufacturers Supplying the Italian Presentation & Planning Market, 2007 .....	119
13.4 DISTRIBUTION	120
Manufacturer Sales of Presentation & Planning Products By Channel. 2007 .....	121
User Purchases of Presentation & Planning Products By Channel, 2007 .....	122
13.5 MARKET FORECAST	123
The Italian Presentation & Planning Market, 2007-2012 (€m at MSP) .....	124
<b>14. THE FUTURE</b>	<b>125</b>
14.1 USER TRENDS	125
Basic Italian Economic Indicators, 2007-2010 (% Change pa) .....	125
Italian Population 2002-2050 (000s) .....	126
14.2 PRODUCT MARKET TRENDS	127
The Italian Office Products Market, 2007-2012 (€m at MSP) .....	128
14.3 DISTRIBUTION CHANNEL TRENDS	129
Unadjusted Channel Shares of the Italian Office Products Market, 2007-2012 (% Share) .....	130
Adjusted Channel Shares Of The Italian Office Products Market, 2007-2012 (% Share) .....	133