



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

**MPA International**

**June 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 .....   | 2  |
| 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 .....                                | 5  |
| <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       | BUSINESS TRENDS .....                               | 16 |
| 4.4       | OFFICE EQUIPMENT TRENDS .....                       | 18 |
| 4.4.1     | Personal Computers .....                            | 18 |
| 4.4.2     | Developments in Office Technology .....             | 22 |
| 4.5       | PURCHASING TRENDS .....                             | 26 |
| 4.5.1     | Homes/Private Users .....                           | 26 |
| 4.5.2     | Small Offices .....                                 | 26 |
| 4.5.3     | Large Offices .....                                 | 27 |
| 4.5.4     | Computer Accessories & Stationery .....             | 27 |
| <b>5.</b> | <b>DISTRIBUTION</b> .....                           | 29 |
| 5.1       | DIRECT SALES FROM MANUFACTURERS .....               | 29 |
| 5.2       | OFFICE PRODUCTS WHOLESALERS .....                   | 29 |
| 5.2.1     | Overview .....                                      | 29 |
| 5.2.2     | Products .....                                      | 30 |
| 5.2.3     | Prospects .....                                     | 30 |
| 5.2.4     | Key Players .....                                   | 30 |
| 5.3       | CONTRACT STATIONERS .....                           | 31 |
| 5.3.1     | Overview .....                                      | 31 |
| 5.3.2     | Products .....                                      | 32 |
| 5.3.3     | Prospects .....                                     | 32 |
| 5.3.4     | Key Players .....                                   | 32 |
| 5.4       | OTHER OFFICE PRODUCTS DEALERS & DEALER GROUPS ..... | 33 |

|           |  |    |
|-----------|--|----|
| 5.4.1     | Overview .....                                       | 33 |
| 5.4.2     | Products .....                                       | 34 |
| 5.4.3     | Prospects .....                                      | 34 |
| 5.4.4     | Key Players .....                                    | 44 |
| 5.5       | <b>MAIL ORDER COMPANIES</b> .....                    |    |
| 5.5.1     | Overview .....                                       | 35 |
| 5.5.2     | Products .....                                       | 36 |
| 5.5.3     | Prospects .....                                      | 36 |
| 5.5.4     | Key Players .....                                    | 36 |
| 5.6       | <b>OFFICE SUPERSTORES</b> .....                      | 37 |
| 5.6.1     | Overview .....                                       | 37 |
| 5.6.2     | Products .....                                       | 37 |
| 5.6.3     | Prospects .....                                      | 37 |
| 5.6.4     | Key Players .....                                    | 37 |
| 5.7       | <b>ORIGINAL EQUIPMENT MANUFACTURERS (OEMS)</b> ..... | 38 |
| 5.8       | <b>CONSUMABLES MASTER DISTRIBUTORS</b> .....         | 38 |
| 5.8.1     | Overview .....                                       | 38 |
| 5.8.2     | Products .....                                       | 38 |
| 5.8.3     | Prospects .....                                      | 39 |
| 5.8.4     | Key Players .....                                    | 39 |
| 5.9       | <b>COMPUTER MAIL ORDER COMPANIES</b> .....           | 40 |
| 5.10      | <b>PAPER MERCHANTS</b> .....                         | 41 |
| 5.10.1    | Overview .....                                       | 41 |
| 5.10.2    | Products .....                                       | 41 |
| 5.10.3    | Prospects .....                                      | 41 |
| 5.10.4    | Key Players .....                                    | 42 |
| 5.11      | <b>HIGH STREET RETAILERS</b> .....                   |    |
| 5.11.1    | Overview .....                                       | 42 |
| 5.11.2    | Products .....                                       | 43 |
| 5.11.3    | Prospects .....                                      | 43 |
| 5.11.4    | Key Players .....                                    | 43 |
| 5.12      | <b>E-TAILERS</b> .....                               | 47 |
| 5.12.1    | Overview .....                                       | 45 |
| 5.12.2    | Products .....                                       | 45 |
| 5.12.3    | Prospects .....                                      | 45 |
| 5.12.4    | Key Players .....                                    | 71 |
| 5.13      | <b>DISTRIBUTION CHANNEL SHARES</b> .....             | 46 |
| <b>6.</b> | <b>COMMERCIAL ENVELOPES</b> .....                    | 49 |
| 6.1       | <b>MARKET SIZE &amp; GROWTH</b> .....                | 49 |
| 6.2       | <b>MARKET SEGMENTS</b> .....                         | 52 |
| 6.2.1     | Bankers & Pockets .....                              | 52 |
| 6.2.2     | Size .....   | 52 |
| 6.2.3     | Colour .....   | 52 |
| 6.2.4     | Seal Method .....                                    | 52 |
| 6.2.5     | Windowed/Non-Windowed .....                          | 53 |
| 6.3       | <b>MANUFACTURERS</b> .....                           | 53 |
| 6.4       | <b>DISTRIBUTION</b> .....                            | 55 |

|           |   |           |
|-----------|---|-----------|
| 6.5       | MARKET FORECAST .....                       | 58        |
| <b>7.</b> | <b>BOOKS &amp; PADS .....</b>               | <b>61</b> |
| 7.1       | MARKET SIZE & GROWTH .....                  | 61        |
| 7.2       | MARKET SEGMENTS .....                       | 63        |
| 7.2.1     | Exercise Books .....                        | 63        |
| 7.2.2     | Memo & Refill Pads .....                    | 63        |
| 7.2.3     | Duplicate & Triplicate Books .....          | 64        |
| 7.2.4     | Manuscript Books .....                      | 64        |
| 7.2.5     | Analysis Books .....                        | 65        |
| 7.3       | MANUFACTURERS .....                         | 65        |
| 7.4       | DISTRIBUTION .....                          | 67        |
| 7.5       | MARKET FORECAST .....                       | 70        |
| <b>8.</b> | <b>CUT OFFICE PAPER .....</b>               | <b>73</b> |
| 8.1       | MARKET SIZE & GROWTH .....                  | 73        |
| 8.2       | MARKET SEGMENTS .....                       | 75        |
| 8.2.1     | Copier/Laser Grades .....                   | 75        |
| 8.2.2     | Top Quality Writings .....                  | 75        |
| 8.2.3     | Specialist Coated Inkjet Papers .....       | 76        |
| 8.2.4     | Office Labels .....                         | 77        |
| 8.3       | KEY MANUFACTURERS & BRANDS .....            | 77        |
| 8.3.1     | Copier/Laser Grades .....                   | 77        |
| 8.3.2     | Top Quality Writings .....                  | 77        |
| 8.3.3     | Specialist Coated Inkjet Papers .....       | 78        |
| 8.3.4     | Office Labels .....                         | 78        |
| 8.4       | DISTRIBUTION .....                          | 79        |
| 8.5       | MARKET FORECAST .....                       | 82        |
| <b>9.</b> | <b>WRITING &amp; GRAPHIC SUPPLIES .....</b> | <b>85</b> |
| 9.1       | MARKET SIZE & GROWTH .....                  | 85        |
| 9.2       | MARKET SEGMENTS .....                       | 87        |
| 9.2.1     | Pencils .....                               | 87        |
| 9.2.2     | Ballpoints .....                            | 88        |
| 9.2.3     | Rollerballs .....                           | 88        |
| 9.2.4     | Gel Ink Pens .....                          | 89        |
| 9.2.5     | Liquid Ink Pens .....                       | 89        |
| 9.2.6     | Fountain Pens .....                         | 90        |
| 9.2.7     | Fibre & Plastic Tip Pens .....              | 90        |
| 9.2.8     | Highlighters .....                          | 91        |
| 9.2.9     | Markers .....                               | 91        |
| 9.2.10    | Refills .....                               | 92        |
| 9.2.11    | Erasers .....                               | 92        |
| 9.2.12    | Correction Aids .....                       | 92        |
| 9.2.13    | Pencil Sharpeners .....                     | 93        |
| 9.2.14    | Rulers .....                                | 93        |
| 9.3       | KEY MANUFACTURERS & BRANDS .....            | 93        |
| 9.4       | DISTRIBUTION .....                          | 95        |
| 9.5       | MARKET FORECAST .....                       | 98        |

|            |  |     |
|------------|--|-----|
| <b>10.</b> | <b>STORAGE &amp; FILING PRODUCTS</b>   | 101 |
| 10.1       | MARKET SIZE & GROWTH                   | 101 |
| 10.2       | SEGMENT TRENDS                         | 103 |
| 10.2.1     | Manila Files                           | 103 |
| 10.2.2     | Expanding Files                        | 103 |
| 10.2.3     | Soft Plastic Filing & Display Books    | 104 |
| 10.2.4     | Suspension Files                       | 104 |
| 10.2.5     | Ring Binders                           | 105 |
| 10.2.6     | Lever Arch Files                       | 105 |
| 10.2.7     | Archival Filing                        | 106 |
| 10.2.8     | Indexes & Dividers                     | 107 |
| 10.3       | MANUFACTURERS                          | 107 |
| 10.4       | DISTRIBUTION                           | 109 |
| 10.5       | MARKET FORECAST                        | 112 |
| <b>11.</b> | <b>COMPUTER ACCESSORIES</b>            | 115 |
| 11.1       | MARKET SUMMARY                         | 115 |
| 11.2       | MARKET SEGMENTS                        | 117 |
| 11.2.1     | Media Storage                          | 117 |
| 11.2.2     | Computer Cleaning Products             | 117 |
| 11.2.3     | Screen filters                         | 118 |
| 11.2.4     | Copyholders                            | 119 |
| 11.2.5     | Mouse mats                             | 119 |
| 11.2.6     | Foot/wrist rests                       | 120 |
| 11.2.7     | Computer luggage                       | 120 |
| 11.3       | MANUFACTURERS                          | 121 |
| 11.4       | DISTRIBUTION                           | 121 |
| 11.5       | MARKET FORECAST                        | 124 |
| <b>12.</b> | <b>OFFICE &amp; DESK ACCESSORIES</b>   | 127 |
| 12.1       | MARKET SIZE & GROWTH                   | 127 |
| 12.2       | MARKET SEGMENTS                        | 129 |
| 12.2.1     | Adhesive Tapes                         | 129 |
| 12.2.2     | Repositionable Notes                   | 129 |
| 12.2.3     | Paper & Card Adhesives                 | 130 |
| 12.2.4     | Scissors                               | 130 |
| 12.2.5     | Staplers, Staples & Staples Extractors | 131 |
| 12.2.6     | Punches                                | 132 |
| 12.2.7     | Guillotines & Trimmers                 | 133 |
| 12.2.8     | Letter Trays/Racks                     | 133 |
| 12.2.9     | Waste Bins                             | 134 |
| 12.2.10    | Rubber Bands, Pins, Clips & Fasteners  | 134 |
| 12.3       | MANUFACTURERS                          | 134 |
| 12.4       | DISTRIBUTION                           | 135 |
| 12.5       | MARKET FORECAST                        | 138 |
| <b>13.</b> | <b>PRESENTATION &amp; PLANNING</b>     | 141 |
| 13.1       | MARKET SIZE & GROWTH                   | 141 |

---

|            |                                       |            |
|------------|---------------------------------------|------------|
| 13.2       | MARKET SEGMENTS .....                 | 143        |
| 13.2.1     | Year Planners & Planning Boards ..... | 143        |
| 13.2.2     | Wallboards & Cork Boards .....        | 143        |
| 13.2.3     | Flipcharts & Accessories .....        | 144        |
| 13.2.4     | Stock Diaries & Planners .....        | 145        |
| 13.3       | MANUFACTURERS .....                   | 145        |
| 13.4       | DISTRIBUTION .....                    | 147        |
| 13.5       | MARKET FORECAST .....                 | 150        |
| <b>14.</b> | <b>THE FUTURE .....</b>               | <b>153</b> |
| 14.1       | USER TRENDS .....                     | 153        |
| 14.1.1     | Economic Forecasts .....              | 153        |
| 14.1.2     | Demographics .....                    | 153        |
| 14.1.3     | Office Technology .....               | 154        |
| 14.2       | PRODUCT MARKET TRENDS .....           | 155        |
| 14.3       | DISTRIBUTION CHANNEL TRENDS .....     | 157        |

**APPENDIX**

MANUFACTURER PROFILES

DISTRIBUTOR 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   | 2  |
| Product Sector Coverage .....   | 3  |
| 1.4 METHODOLOGY   | 3  |
| 1.5 DEFINITIONS   | 4  |
| Definitions .....   | 4  |
| 1.6 EXCHANGE RATES  | 5  |
| Euro Exchange Rates at October 2007 .....                               | 5  |
| Euro Exchange Rates at October 2006 .....                               | 5  |
| <b>2. MARKET SUMMARY</b>  | 7  |
| The Spanish Office Products Market, 2006-2007 (€bn MSP) .....           | 8  |
| The Spanish Office Products Market, 2007 .....                          | 9  |
| <b>3. ECONOMIC BACKGROUND</b>   | 11 |
| 3.1 BASIC ECONOMIC INDICATORS   | 11 |
| Basic Spanish Economic Indicators, 2005-2007 (% Change pa) .....        | 11 |
| 3.2 FORECASTS   | 11 |
| Basic Spanish Economic Indicators, 2008-2009 (% Change pa) .....        | 11 |
| <b>4. USER TRENDS</b>   | 13 |
| 4.1 POPULATION TRENDS   | 13 |
| Spanish Population, 2002-2020 .....                                     | 13 |
| Spanish Population by Age Group, 2007 .....                             | 14 |
| 4.2 EMPLOYMENT TRENDS   | 14 |
| Employment Levels in Spain, 2005-2007 (000s) .....                      | 14 |
| Spanish Employment by Region, 2006 .....                                | 15 |
| Spanish Employment by Broad Industrial Sector, 2003-2006 (%) .....      | 16 |
| 4.3 BUSINESS TRENDS   | 16 |
| Number of Companies in Spain, 2002-2007 (Thousand & % Change) .....     | 17 |
| Number of Companies in Spain by Activity, 2005-2007 (% Base) .....      | 17 |
| Number of Enterprises in Spain by Size, 2007 (Thousand & % Share) ..... | 18 |
| 4.4 OFFICE EQUIPMENT TRENDS   | 18 |
| PC Penetration by Country/Region, 2005 .....                            | 19 |
| Spain IT Market Shipments, 2004-2008 (Units) .....                      | 20 |
| Spain IT Market Shipments, 2004-2008 (% Change pa) .....                | 20 |
| Evolution of Average European PC Selling Prices, 1999-2007 (€) .....    | 21 |
| Wire Based Internet Users, 2005-2010 (000s) .....                       | 23 |
| Web Users, 2006-2010 .....  | 24 |
| Number of ADSL* Lines, 2007 (000s) .....                                | 25 |
| Internet Hosts Worldwide, 2000-2006 (millions) .....                    | 25 |
| Internet Commerce in Spain, 2006-2010 (€bn) .....                       | 26 |
| 4.5 PURCHASING TRENDS   | 26 |

|   |    |
|---|----|
| <b>5. DISTRIBUTION</b>  | 29 |
| 5.1 DIRECT SALES FROM MANUFACTURERS   | 29 |
| 5.2 OFFICE PRODUCTS WHOLESALERS   | 29 |
| Major Spanish Office Products Wholesalers, 2007 .....                                       | 31 |
| 5.3 CONTRACT STATIONERS   | 31 |
| Major Spanish Contract Stationers, 2007 .....   | 33 |
| 5.4 OTHER OFFICE PRODUCTS DEALERS & DEALER GROUPS   | 33 |
| Major Spanish Dealer Groups, 2007 .....   | 35 |
| 5.5 MAIL ORDER COMPANIES  |    |
| Major Spanish Mail Order Companies, 2007 .....  | 36 |
| 5.6 OFFICE SUPERSTORES  | 37 |
| 5.7 ORIGINAL EQUIPMENT MANUFACTURERS (OEMS)   | 38 |
| 5.8 CONSUMABLES MASTER DISTRIBUTORS   | 38 |
| Major Spanish Consumables Master Distributors, 2007 .....                                   | 39 |
| 5.9 COMPUTER MAIL ORDER COMPANIES   | 40 |
| 5.10 PAPER MERCHANTS  | 41 |
| Major Spanish Paper Merchants, 2007 .....   | 42 |
| 5.11 HIGH STREET RETAILERS  |    |
| Office Products Retailers, 2007 .....   | 44 |
| Major Spanish Supermarkets/Hypermarkets/Department Stores, 2007 .....                       | 44 |
| 5.12 E-TAILERS  | 47 |
| Major Spanish Office Products E-Tailers, 2007 .....   | 46 |
| 5.13 DISTRIBUTION CHANNEL SHARES  | 46 |
| Channel Shares of The Spanish Office Products Market, 2007 .....                            | 47 |
| <b>6. COMMERCIAL ENVELOPES</b>  | 49 |
| 6.1 MARKET SIZE & GROWTH  | 49 |
| Spanish Letter Post Traffic Volumes, 2003-2006* (millions) .....                            | 49 |
| The Spanish Commercial Envelope Market, 2006-2007 (€m at MSP) .....                         | 51 |
| 6.2 MARKET SEGMENTS   | 52 |
| 6.3 MANUFACTURERS   | 53 |
| Key Manufacturers Supplying the Spanish Commercial Envelopes Market, 2007 (€m at MSP) ..... | 54 |
| 6.4 DISTRIBUTION  | 55 |
| Manufacturer Sales of Commercial Envelopes by Channel, 2007 .....                           | 56 |
| User Purchases of Commercial Envelopes by Channel, 2007 .....                               | 57 |
| 6.5 MARKET FORECAST   | 58 |
| The Spanish Commercial Envelopes Market, 2007-2012 (€m at MSP) .....                        | 59 |

|  |     |
|--|-----|
| <b>7. BOOKS &amp; PADS</b>   | 61  |
| 7.1 MARKET SIZE & GROWTH   | 61  |
| The Spanish Books & Pads Market, 2006-2007 (€m at MSP) . . . . .                                     | 62  |
| 7.2 MARKET SEGMENTS  | 63  |
| 7.3 MANUFACTURERS  | 65  |
| Key Manufacturers in the Spanish Books & Pads Market (Estimated Ranking) . . . . .                   | 66  |
| 7.4 DISTRIBUTION   | 67  |
| Manufacturer Sales of Books and Pads by Channel, 2007 . . . . .                                      | 68  |
| User Purchases of Books & Pads by Channel, 2007 . . . . .  | 69  |
| 7.5 MARKET FORECAST  | 70  |
| The Spanish Books & Pads Market, 2007-2012 (€m at MSP) . . . . .                                     | 71  |
| <b>8. CUT OFFICE PAPER</b>   | 73  |
| 8.1 MARKET SIZE & GROWTH   | 73  |
| The Spanish Cut Office Paper Market, 2006-2007 (€m at MSP) . . . . .                                 | 74  |
| 8.2 MARKET SEGMENTS  | 75  |
| 8.3 KEY MANUFACTURERS & BRANDS   | 77  |
| Major Brands of Copier Paper in the Spanish Market, 2007 . . . . .                                   | 77  |
| Major Brands of Top Quality Writing Paper in the Spanish Market, 2007 . . . . .                      | 78  |
| Major Brands of Specialist Coated Inkjet Paper in the Spanish Market, 2007 . . . . .                 | 78  |
| 8.4 DISTRIBUTION   | 79  |
| Mills/OEMs Sales of Cut Office Paper by Channel, 2007 . . . . .                                      | 80  |
| User Purchases of Cut Office Paper by Channel, 2007 . . . . .  | 81  |
| 8.5 MARKET FORECAST  | 82  |
| The Spanish Cut Office Paper Market, 2007-2012 (€m at MSP) . . . . .                                 | 83  |
| <b>9. WRITING &amp; GRAPHIC SUPPLIES</b>   | 85  |
| 9.1 MARKET SIZE & GROWTH   | 85  |
| The Spanish Writing & Graphic Supplies Market, 2006-2007 (€m at MSP) . . . . .                       | 86  |
| 9.2 MARKET SEGMENTS  | 87  |
| 9.3 KEY MANUFACTURERS & BRANDS   | 93  |
| Key Manufacturers Supplying the Spanish Writing & Graphic Supplies Market 2007 (€m at MSP) . . . . . | 94  |
| 9.4 DISTRIBUTION   | 95  |
| Manufacturer Sales of Writing & Graphic Supplies by Channel, 2007 . . . . .                          | 96  |
| User Purchases of Writing & Graphic Supplies by Channel, 2007 . . . . .                              | 97  |
| 9.5 MARKET FORECAST  | 98  |
| The Spanish Writing & Graphic Supplies Market, 2007-2012 (€m at MSP) . . . . .                       | 99  |
| <b>10. STORAGE &amp; FILING PRODUCTS</b>   | 101 |
| 10.1 MARKET SIZE & GROWTH  | 101 |
| The Spanish Storage & Filing Products Market, 2006-2007 (€m at MSP) . . . . .                        | 102 |
| 10.2 SEGMENT TRENDS  | 103 |
| 10.3 MANUFACTURERS   | 107 |
| Key Manufacturers Supplying the Spanish Storage & Filing Products Market, 2007 (€m at MSP) . . . . . | 108 |
| 10.4 DISTRIBUTION  | 109 |
| Manufacturer Sales of Storage & Filing Products by Channel, 2007 . . . . .                           | 110 |
| User Purchases of Storage & Filing Products by Channel, 2007 . . . . .                               | 111 |
| 10.5 MARKET FORECAST   | 112 |
| The Spanish Storage & Filing Products Market, 2007-2012 (€m at MSP) . . . . .                        | 113 |

|   |     |
|---|-----|
| <b>11. COMPUTER ACCESSORIES</b>   | 115 |
| 11.1 MARKET SUMMARY   | 115 |
| The Spanish Computer Accessories Market, 2006-2007 (€m MSP) . . . . .                               | 116 |
| 11.2 MARKET SEGMENTS  | 117 |
| 11.3 MANUFACTURERS  | 121 |
| Key Manufacturers Supplying the Spanish Computer Accessories Market, 2007 . . . . .                 | 121 |
| 11.4 DISTRIBUTION   | 121 |
| Manufacturer Sales of Computer Accessories by Channel, 2007 . . . . .                               | 122 |
| User Purchases of Computer Accessories by Channel, 2007 . . . . .                                   | 123 |
| 11.5 MARKET FORECAST  | 124 |
| The Spanish Computer Accessories Market, 2007-2012 (€m at MSP) . . . . .                            | 125 |
| <b>12. OFFICE &amp; DESK ACCESSORIES</b>  | 127 |
| 12.1 MARKET SIZE & GROWTH   | 127 |
| The Spanish Office & Desk Accessories Market, 2006-2007 (€m at MSP) . . . . .                       | 128 |
| 12.2 MARKET SEGMENTS  | 129 |
| 12.3 MANUFACTURERS  | 134 |
| Key Manufacturers Supplying the Spanish Office & Desk Accessories Market, 2007 . . . . .            | 135 |
| 12.4 DISTRIBUTION   | 135 |
| Manufacturer Sales of Office & Desk Accessories by Channel, 2007 . . . . .                          | 136 |
| User Purchases of Office & Desk Accessories by Channel, 2007 . . . . .                              | 137 |
| 12.5 MARKET FORECAST  | 138 |
| The Spanish Office & Desk Accessories Market, 2007-2012 (€m at MSP) . . . . .                       | 139 |
| <b>13. PRESENTATION &amp; PLANNING</b>  | 141 |
| 13.1 MARKET SIZE & GROWTH   | 141 |
| The Spanish Presentation & Planning Market, 2007-2012 (€m at MSP) . . . . .                         | 142 |
| 13.2 MARKET SEGMENTS  | 143 |
| 13.3 MANUFACTURERS  | 145 |
| Key Manufactureres Supplying the Spanish Presentation & Planning Market, 2007 (€m at MSP) . . . . . | 146 |
| 13.4 DISTRIBUTION   | 147 |
| Manufacturer Sales of Presentation & Planning Products by Channel, 2007 . . . . .                   | 148 |
| User Purchases of Presentation & Planning Products by Channel, 2007 . . . . .                       | 149 |
| 13.5 MARKET FORECAST  | 150 |
| The Spanish Presentation & Planning Market, 2007-2012 (€m at MSP) . . . . .                         | 151 |
| <b>14. THE FUTURE</b>   | 153 |
| 14.1 USER TRENDS  | 153 |
| Basic Spanish Economic Indicators, 2008-2009 (% Change pa) . . . . .                                | 153 |
| The Spanish Population, 2002-2020 (000s) . . . . .  | 154 |
| 14.2 PRODUCT MARKET TRENDS  | 155 |
| The Spanish Office Products Market, 2007-2012 (€m at MSP) . . . . .                                 | 156 |
| 14.3 DISTRIBUTION CHANNEL TRENDS  | 157 |
| Unadjusted Channel Shares of the Spanish Office Products Market, 2007-2012 (% Share) . . . . .      | 158 |
| Adjusted Channel Shares Of The Spanish Office Products Market, 2007-2012 (% Share) . . . . .        | 161 |