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The State Of The OP Industry Report **2018-19** A Market Insight Resource For The OP Industry

By Martin Wilde Associates (MWA) and OPI

Once again, the last 12 months have seen the global office products (OP) industry continue to change substantially:

- Despite economic recovery being established in most markets, overall demand for traditional OP is steady at best, and in decline in many countries. What is the current estimated value of the core OP market, how is this changing in 2018 and 2019, and which of its subcategories are faring the worst and best?
- Distributors continue to report increasing sales of alternative product categories and services, particularly facilities supplies and business gifts. What is the estimated size of the available market for facilities supplies and in which of its constituent subcategories are OP distributors seeing the most growth at present?
- Managed print (MPS) is now firmly on the agenda for many OP distributors: what share of sales does this now account for?
- Distributor margins continue to be under pressure: which types of OP distributor have 'bucked the trend', and how have they managed to do so?
- Profound changes are occurring in the structure of supply: e-commerce is now firmly established as the dominant OP ordering method in many countries, while traditional channels continue to be challenged. What channels have won and lost share in each country 2018 and which are most expected to benefit in 2019?
- Amazon – with its Amazon Business operation now firmly established in many countries - is now widely recognised as a fast-growing player in this market. What share of the core OP market is it now believed to have, and where is it being most successful? What has been the reaction in Australia to the arrival of Amazon?
- What has been the reaction in the USA and Canada to the possible acquisition of Essendant by Staples?
- What are opinions in Europe about the possible future survival of ADVEO, and how will the wholesale landscape look if ADVEO doesn't survive?

In such turbulent times, senior industry executives need a reliable yardstick against which to assess their own perceptions and strategies. Martin Wilde Associates (MWA) – specialist researchers to the global OP market – and OPI, the global OP industry publisher, are proud to announce the launch of the sixth edition of their annual research study, “The State Of The OP Industry 2018-19”, which aims to be a ‘must have’ authoritative sourcebook for the OP industry, which:

Research for the study will commence in February 2019, with the report being published in April 2019.

- Investigates the state of the OP markets in the US, Canada, Benelux, France, Germany, UK and Australia in detail.
- Is based on insights and data collected from in-depth and online interviews with c50 senior OP industry executives in the US (c10 interviews), Canada (c4), Benelux (c3), France (c7), Germany (c7), UK (c10) and Australia (c4).
- Collates and reports the 2018 financial performance of the key 15 OP distributors in the US and Europe, as well as the main industry events of 2018.
- Includes analysis and commentary from Martin Wilde, who has unrivalled experience of researching the global OP market, supplemented by further data and analysis from OPI, the leading global OP industry magazine.

The data collected from these senior OP industry executives will aim to answer the following questions for each country market covered by the study:

- What was the value of the core OP market in 2018?
- What are the core OP market growth trends in 2018 and 2019?
- What will be the value of the core OP market in 2019?
- What was the value of the addressable facilities supplies market in 2018?
- What are respondents' overall revenue and margin trends in 2018 and 2019?
- What share of respondents' sales are accounted for by JanSan supplies, breakroom/catering supplies, workwear/PPE, business gifts/promotional products, MPS and wellbeing/ergonomic products in 2018 and 2019?
- Which product categories are growing or declining overall in 2018 and 2019?
- Which distribution channels won or lost share in 2018 and 2019?
- What are the shares of respondents' sales in e-commerce and own label products in 2018 and 2019?
- What share of the core OP market does Amazon/Amazon Business now have, and which customers is it being most successful in capturing? What has been the reaction in Australia to the entry of Amazon?
- What are the recent and future results of the proposed acquisition of Essendant?
- What are opinions in Europe about the possible future survival of ADVEO, and how will the wholesale landscape look if ADVEO doesn't survive?

This authoritative industry-wide report is available for only £599 if ordered before 31st January 2019, and for £850 thereafter.



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