



FM Supplies: Mountain or Molehill?

Just how big is this opportunity?

With demand for 'traditional' office products (OP) in structural value decline over recent years, OP resellers have increasingly turned to other product areas, recognising the potential opportunities of being a 'solutions provider' to their B2B customers, rather than just a supplier of stationery.

One of the main sectors has been FM (Facilities Management) supplies – or 'Janitorial/Sanitorial/Breakroom/Industrial/Health & Safety/Mailroom supplies' – a market that has been conservatively estimated as being approximately 30% larger than the traditional OP sector.

Certainly, OP resellers have seen significant growth in FM's share of their total sales: in the UK, for example, FM supplies now accounts for:

- 11-12% of total OP wholesaler sales
- Between 7-15% of OP dealers' sales on average.

Indeed, some are reporting annual increases of 8-10% pa in this category – at a time when growth has been hard to find elsewhere.

Despite this growth, the OP industry still accounts for a small share of the overall FM supplies market. While this could be seen as an opportunity for further growth, it also points to a potential weakness in the OP industry's position, since there are many other powerful specialist and non-specialist channels also supplying these products – and having a potential interest in supplying OP.

As a result, the OP industry needs to understand how B2B end-user buyers of these products currently behave - and how they are likely to behave in future. Key questions include:

- Who buys these products?
- How many FM product categories do they purchase?
- How much do they spend on these products annually?
- What other products do they buy? Do they also buy OP items?
- Where do they currently buy these products from, and on what basis are suppliers selected?
- Do they buy FM supplies from OP resellers? What share of their purchases do these account for, currently?
- What barriers are preventing the use of OP resellers, and what would encourage them to purchase FM supplies from them in future?
- What are their service requirements?
- How and where do buyers search for products?
- Which brands are most important?
- How acceptable are private label products?
- How else will the purchasing of these products change in future?

Martin Wilde Associates (MWA) – specialist researchers to the global OP market-and OPI – the global OP industry magazine – are proud to announce the publication of a new research study, "*FM Supplies:Mountain or Molehill?*", which provides answers to these and other key questions.

Based on 300 in-depth interviews with B2B buyers of FM supplies in the US, and another 300 in the UK, the research - published in two reports, each focusing on one of these two countries - looks at the purchasing of the following FM categories:

Category	Includes
Breakroom/Catering Products	Food; beverages; catering utensils, appliances & supplies.
Cleaning/Janitorial Products	Cleaning chemicals, materials and appliances; washroom/restroom cleaners; hand & skin care; towels, dispensers & accessories; refuse products.
Health, Safety & Security Products	First aid & health supplies; personal protection equipment (PPE); fire & safety products; cash, key & security products.
Mailroom, Shipping & Packaging Products	Mailing, packing & shipping supplies & equipment.

Quotas were applied to the sample to ensure that at least 150 buyers of each of the above categories were interviewed in each country, and that a range of company sizes and activities were investigated.

In the report, MWA compares and contrasts the answers to the key issues across business size categories, ensuring that the collected data yields the information that manufacturers, wholesalers and resellers will need to determine future strategy, product ranges, communications and investment decisions.

In addition, in-depth interviews with OP wholesalers and OP dealer groups were also carried out in each country in order to gather their views of what the future holds for FM supplies in the OP channel.

The results of the research are available now, in two 150+ page full written reports:

- USA
- UK

The reports can be ordered via the OPI web site for US\$3,100/£2,000 per report or for a special discounted price of US\$5,100/£3,300 for the two publications.

To order your copy, complete the Order Form and return it to OPI, or order your copy online at www.opi.net/mole



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