



CANADIAN OFFICE PRODUCTS ASSOCIATION ASSOCIATION CANADIENNE DES PRODUITS DE BUREAU

Where business solutions and networking meet

Industry Data Reports

COPA introduced **Industry Data Reports** more than 10 years ago. These quarterly reports provide product sales by 6 major categories and 27 sub-categories across 4 regions in Canada.

Industry	2012 Sales		2013 Sales		Change in Sales	
	QTR 1	YTD	QTR 1	YTD	Variance	%
Business Machines	\$ 92,146,090	\$ 92,146,090	\$ 90,572,590	\$ 90,572,590	\$ (1,573,500)	-1.7%
Computer (Supplies)	\$ 388,703,292	\$ 388,703,292	\$ 409,730,460	\$ 409,730,460	\$ 21,027,168	5.4%
Paper Products	\$ 128,956,513	\$ 128,956,513	\$ 126,075,285	\$ 126,075,285	\$ (2,881,229)	-2.2%
Furniture	\$ 71,737,043	\$ 71,737,043	\$ 67,052,126	\$ 67,052,126	\$ (4,684,917)	-6.5%
Office Supplies	\$ 208,127,434	\$ 208,127,434	\$ 202,009,874	\$ 202,009,874	\$ (6,117,560)	-2.9%
Other	\$ 92,851,915	\$ 92,851,915	\$ 101,914,683	\$ 101,914,683	\$ 9,062,768	9.8%
Grand Total	\$ 982,522,287	\$ 982,522,287	\$ 997,355,018	\$ 997,355,018	\$ 14,832,731	1.5%
Sub-Categories:						
<i>Business Machines</i>	<i>Computer (Supplies)</i>	<i>Paper Products</i>	<i>Furniture</i>	<i>Writing</i>	<i>Other</i>	
<i>Shredders</i>	<i>Storage</i>	<i>Envelopes</i>	<i>Chairs</i>	<i>Office Essentials - non-consumable</i>	<i>Janitorial & Sanitation</i>	
<i>Copiers/fax/multi-function devices</i>	<i>Computer Hardware</i>	<i>Fine White Commodity</i>	<i>Workstations</i>	<i>Office Essentials - consumables</i>	<i>Food & Beverage</i>	
<i>Calculators</i>	<i>Computer Software</i>	<i>Fine Other Technology</i>	<i>File Cabinets</i>	<i>Other</i>	<i>Services</i>	
<i>Presentation Products</i>	<i>Inkjet Supplies</i>	<i>Pads</i>	<i>Other</i>		<i>Other</i>	
<i>Other</i>	<i>Toner Supplies</i>	<i>Other</i>				
	<i>Computer Accessories</i>					
	<i>Other</i>					

The Data Factory

The Industry Data Reports provided resellers with an excellent baseline for comparing total sales and sales by major categories, but provided marketers and category managers with little insight into the type or actual products sold. Manufacturers were also looking for greater details than what was currently available on sales to commercial customers.

In early 2012, the Data Factory Committee, made up of leaders in the Canadian office products industry, was formed to help in the development and expansion of the Industry Data Reports.

Why COPA

No nonsense, no hype, no manipulation—Just the facts!

The Canadian Office Products Association (COPA) is a not for profit organization. Fees are standard and all revenues are reinvested into the Association to deliver cost-effective business solutions and networking to its members.



How we do it?

The heart of the Data Factory is its product database. The products database provides context and dimensions to the data and links between vendors, resellers and industry standards. The database is a result of an exhaustive and independent analysis of vendor and reseller products in the Canadian market.

Sales data is collected directly from our member resellers and married to the product database to provide rich reporting by categories, sub-categories and key attributes.

Key Features

- Data is collected on a product / SKU level
- Total sales and units are reported separately for Commercial and Retail
- Branded products are included
- Calculation of eachs (principle items per SKU ex. SKU with 5 pencils + eraser = 5 eachs)
- Categories and sub-categories
- Attributes (Colour, size, width, barrel colour, grips, recycled, etc.)
- Other information is captured for cross-reference and future reporting
 - Manufacturers and Reseller product numbers
 - New, discontinued, change and effective dates
 - Reseller Product Numbers
 - UPC / GTIN numbers
 - Vendor minimum order size
 - MSDS numbers

Over the past months this new data has confirmed many of our beliefs and provided new insight into our industry.

- Commercial sales accounts for 45% of sales but 51% of "eachs" volumes.
- Volumes or average prices on a unit basis are extremely misleading.
- The "Ranking" of product sales can vary considerably between retail and commercial.
- Branded products play a major role in retail sales but are often ranked #5 or lower in commercial sales.
- Packaging appears to be a major difference.
- While commercial prices are generally lower than retail prices on high volume, contracted products, average commercial prices on low volume, non-contracted products can be significantly higher.

Sample Reports

Quarterly Sales Report

- By Pens, Gel Pens, Ballpoint Retractable, by SKU
- Split by Retail and Commercial Sales



- Ranked separately by Total, Retail and Commercial sales

Fig. 1 Product Ranking

Q2 2013 Sub-Category with SKU Detail	Sales				Rank		
	Retail	Commercial	Commercial %	Total	Retail	Commercial	Total
Writing Instruments	\$17,019,324	14,282,409	45.6%	\$31,301,733			
Pens	\$6,665,837	7,103,829	51.6%	\$13,769,666			
Gel Pens	\$1,875,995	2,161,342	53.5%	\$4,037,337			
Ballpoint Pens - RT	\$1,986,441	2,011,036	50.3%	\$3,997,477			
Branded RT Ball Point Pen	\$493,470	336,469	40.5%	\$829,939	1	2	1
FlexGrip Ultra RT Ballpoint Pen	\$122,107	357,717	74.6%	\$479,824	5	1	2
ComfortMate RT Ballpoint Pen	\$104,727	162,838	60.9%	\$267,565	7	3	3
Profile RT Ballpoint Pen	\$143,072	108,798	43.2%	\$251,870	2	4	4
Z-Grip RT Ball Point Pen	\$116,329	81,279	41.1%	\$197,608	6	5	5
SoftFeel RT Ballpoint Pen	\$137,906	54,816	28.4%	\$192,722	3	9	6
InkJoy 300 RT Ballpoint Pen	\$124,213	15,678	11.2%	\$139,891	4	23	7
Velocity Bold RT Ballpoint Pen	\$97,371	15,245	13.5%	\$112,616	8	26	8
Atlantis RT Ballpoint Pen	\$85,869	23,744	21.7%	\$109,613	9	20	9
Pro+ RT Ballpoint Pen	\$67,733	28,826	29.9%	\$96,559	11	18	10

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Note:

- The #2 ranked product in total is ranked #1 commercially but only #5 retail.
- Products ranked 7-9 in total are ranked in the 20's in commercial

Quarterly Category UOM Report

- Split by Retail and Commercial Sales
- Ranked by separately by Total, Retail and Commercial sales

Fig. 2 UOM

Q2 2013 Unit Of Measure	Sales			Rank		
	Retail	Commercial	Total	Retail	Commercial	Total
Writing Instruments	\$17,019,324	14,282,409	\$ 31,301,733			
Pens	\$6,665,837	7,103,829	\$ 13,769,666			
Each - 1	\$1,689,939	5,860,808	\$ 7,550,747	1	1	1
Box - 12	\$771,228	867,290	\$ 1,638,518	2	2	2
Carded - 4	\$764,080	42,755	\$ 806,835	3	5	3
Carded - 3	\$619,460	25,576	\$ 645,036	4	7	4
Pack - 12	\$448,211	156,412	\$ 604,623	6	3	5
Carded - 2	\$530,485	55,498	\$ 585,983	5	4	6
Pack - 8	\$420,495	0	\$ 420,495	7	19	7
Pack - 5	\$168,791	0	\$ 168,791	8	19	8
Carded - 5	\$157,549	432	\$ 157,981	9	17	9
Carded - 8	\$151,425	2,282	\$ 153,707	10	16	10

Statistics Courtesy of COPA, Data Factory, Copyright- All Rights Reserved

Note:

- “Eachs” accounts for 83% of commercial sales but only 25% of retail sales even though “Eachs” are ranked #1 for all groups.
- In fact, 95% of commercial sales are focused in 2 UOM “Eachs” and a “Box-12” while retail sales are spread across a broad assortment of package types.
- The Pak-8 UOM is Ranked 7 in retail but show no sales commercially.



Quarterly Category Variance Report

- Units (SKUs), Eachs and Average Price
- By SKU

Fig. 3 Units, Eachs, Average Price

Writing Instruments Category	Units				Eachs				Average Price			% Variance				
	Q1	Q2	Var.	%	Q1	Q2	Var.	%	Q1 / Unit	Q2 / Unit	Var	Q1 Eachs	Q2 Eachs	Var	Units	Eachs
Writing Instruments	19,516,900	19,195,083	(321,817)	-1.68%	78,213,850	79,950,026	1,736,176	2.17%	\$1.808	\$1.631	(\$0.178)	\$0.451	\$0.392	(\$0.060)	-9.8%	-13.2%
Pens	10,456,659	9,612,061	(844,598)	-8.79%	36,627,311	34,498,729	(2,128,582)	-6.17%	\$1.526	\$1.433	(\$0.093)	\$0.436	\$0.399	(\$0.036)	-6.1%	-8.4%
Brand	1,443,650	1,418,120	(25,530)	-1.80%	12,101,861	12,281,977	180,116	1.47%	\$2.116	\$1.926	(\$0.189)	\$0.252	\$0.222	(\$0.030)	-8.9%	-11.9%
Paper Mate	3,205,429	3,047,314	(158,115)	-5.19%	3,619,244	3,366,955	(252,289)	-7.49%	\$0.842	\$0.828	(\$0.014)	\$0.746	\$0.749	\$0.004	-1.7%	0.5%
Uni-Ball	962,581	869,192	(93,389)	-10.74%	1,214,340	1,081,009	(133,331)	-12.33%	\$2.357	\$2.326	(\$0.031)	\$1.868	\$1.871	\$0.002	-1.3%	0.1%
BIC	1,764,938	1,588,972	(175,966)	-11.07%	15,556,937	14,427,139	(1,129,798)	-7.83%	\$1.350	\$1.264	(\$0.086)	\$0.153	\$0.139	(\$0.014)	-6.4%	-9.1%
Pilot	1,034,353	940,362	(93,991)	-10.00%	1,324,422	1,071,581	(252,841)	-23.60%	\$2.398	\$1.962	(\$0.435)	\$1.872	\$1.722	(\$0.150)	-18.1%	-8.0%
Zebra	1,113,318	932,456	(180,862)	-19.40%	1,484,174	1,185,547	(298,627)	-25.19%	\$1.425	\$1.406	(\$0.019)	\$1.069	\$1.106	\$0.037	-1.4%	3.4%
Pentel	845,418	748,328	(97,090)	-12.97%	1,024,514	877,338	(147,176)	-16.78%	\$1.489	\$1.551	\$0.062	\$1.229	\$1.323	\$0.094	4.2%	7.7%
Staedtler	79,598	57,901	(21,697)	-37.47%	264,723	157,594	(107,129)	-67.98%	\$2.184	\$2.086	(\$0.099)	\$0.657	\$0.766	\$0.109	-4.5%	16.7%
Merangue	5,159	5,576	417	7.48%	20,524	32,323	11,799	36.50%	\$7.375	\$6.782	(\$0.593)	\$1.854	\$1.170	(\$0.684)	-8.0%	-36.9%
Stabilo	1,754	3,388	1,634	48.23%	1,754	3,388	1,634	48.23%	\$3.414	\$1.493	(\$1.922)	\$3.414	\$1.493	(\$1.922)	-56.3%	-56.3%

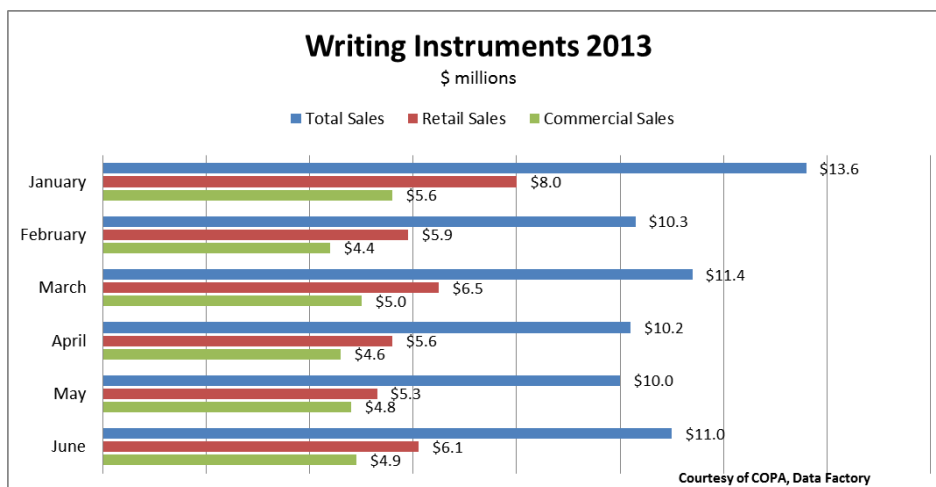
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Note:

- In Q2 2013 19 million units (SKUs) were sold but in terms of eachs close to 80 million eachs were sold.
- Comparing Average Price by Units (SKU) with diverse content is meaningless.
- In Q2 2013 844 thousand fewer SKUs were sold but in terms of eachs over 2 million fewer pens were sold. Note: This is not as bad as it looks. See Monthly Sales below.

Monthly Sales Reports

- Split by Total, Retail and Commercial



Courtesy of COPA, Data Factory

Note:

- The apparent drop in sales in Q2 2013 is not due to sales in Q2 but to unusually high sales in January 2013 following disappointing Christmas sales in December 2012.
- Retail sales experience significant month to month fluctuation while commercial sales are more stable and predictable.



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About COPA

The Canadian Office Products Association (COPA) is the leading representative of the nation's office product retailers and manufacturers.

Founded in 1933 as the Stationers' Guild of Canada Inc., the organization broadened its mandate in 1956 to become the Stationery and Office Equipment Guild of Canada Inc., and in 1968 evolved into what is today known as the Canadian Office Products Association. During its history, the Association has re-engineered itself to reflect the ever-changing needs of its members as well as the industry itself.

Call now to receive the latest reports

COPA's Data Factory Reports are a cost effective tool for:

- Brand and Portfolio Management
- Market Performance
- Retail or Commercial Marketing
- Assortment Analysis
- Market Comparisons
- Setting Marketing and Financial Targets

Reports are available in a variety of formats, as well as level of detail and frequency. Whether it's insight into private label growth, volume, or pricing, we can be trusted to improve bottom-line profits and maximize return on investment.

Please contact Sam Moncada, COPA president, at smoncada@copa.ca for further details or for an in-house demonstration.

We thank the following individuals for dedicating their time and expertise:

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