

Paper Buying Survey

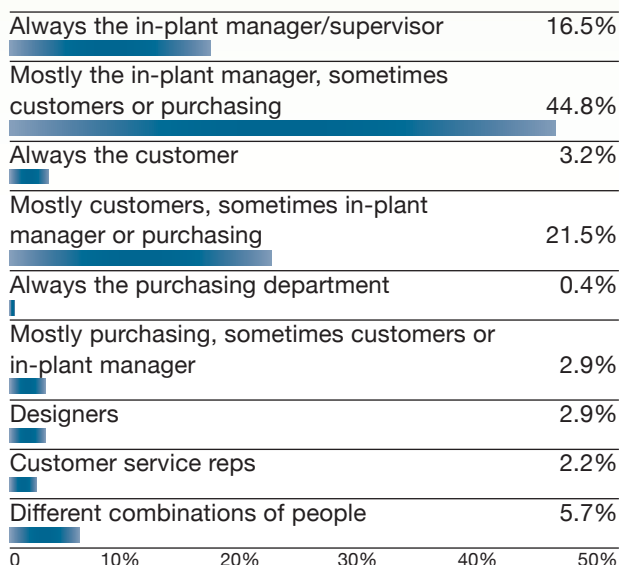
IN-PLANTS PLAY a very large role in buying and specifying paper for their customers, with 52 percent of them spending more than \$100,000 on paper annually. Most rely on multiple merchants to get the best deals, with 17.5 percent saying they changed their primary paper supplier in the past year due to factors like poor service, better prices/availability elsewhere or new bid contracts.

When it comes to using environmentally responsible papers, apathy seems to be taking hold in organizations. The percentage that consider the use of “green” papers to be “extremely important” is virtually identical to the percentage that did so in our 2011 survey (17 percent).

Read on to learn more about the paper-buying and usage habits of in-plants.

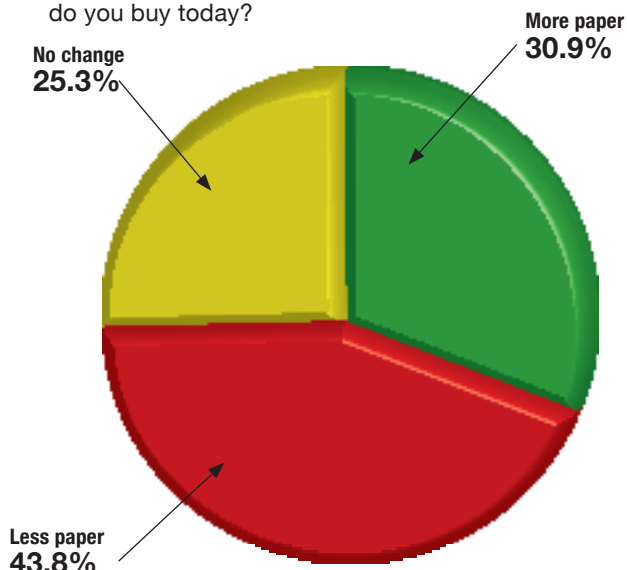
Who Picks Paper?

Managers still play the biggest role in specifying paper.



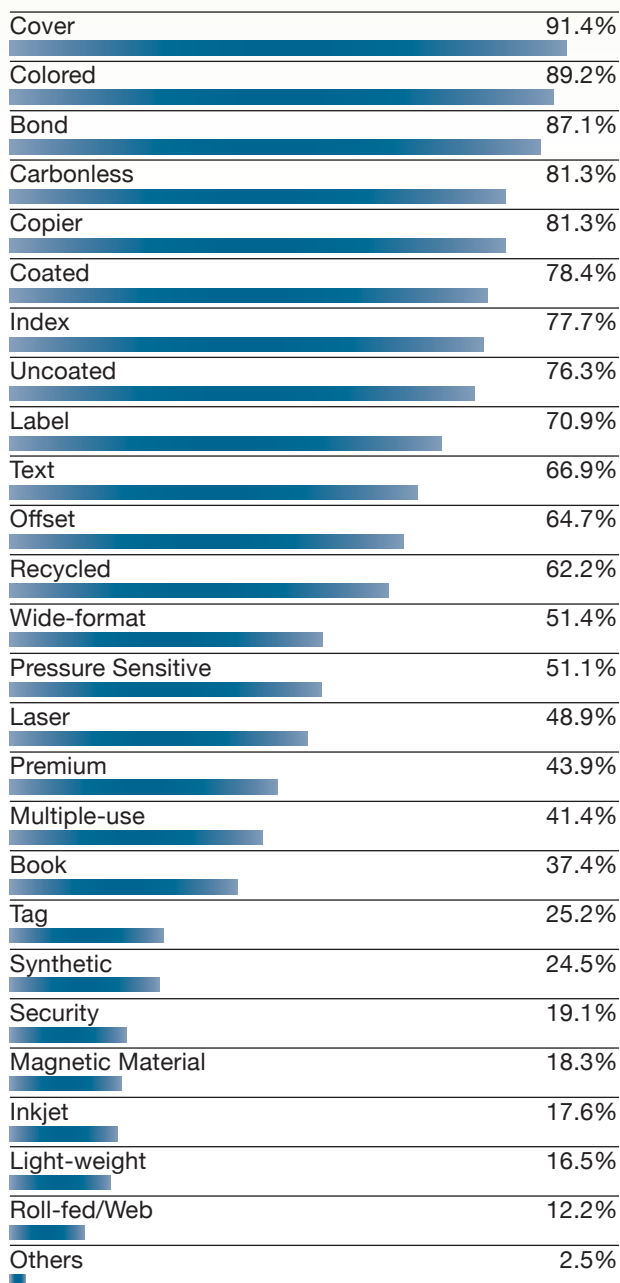
Paper Purchases Drop

Compared with two years ago, how much paper do you buy today?



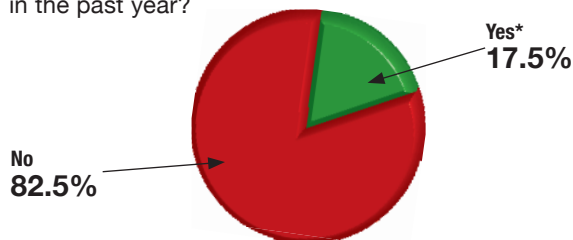
Type of Paper

Here are the most popular papers bought by in-plants.



Supplier Loyalty

Have you changed your primary paper supplier in the past year?



* Reasons: better price, poor customer service, new state contract, yearly bid contract, closed retail store, new suppliers, for better delivery service, mill changes, product availability, complicated online purchasing system

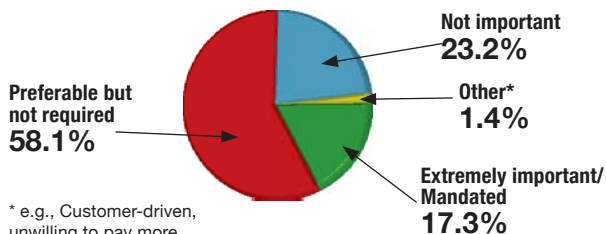
Paper Expenditures

More than half of in-plants spend over \$100,000 on paper annually.

Up to \$25,000	9.4%
Between \$25,001 and \$50,000	14.9%
Between \$50,001 and \$100,000	23.6%
Between \$100,001 and \$200,000	18.8%
Between \$200,001 and \$300,000	8.7%
Between \$300,001 and \$400,000	5.1%
Between \$400,001 and \$500,000	4.0%
Between \$500,001 and \$750,000	6.5%
Between \$750,001 and \$1,000,000	3.3%
More than \$1,000,000	5.8%

Light 'Green' Movement

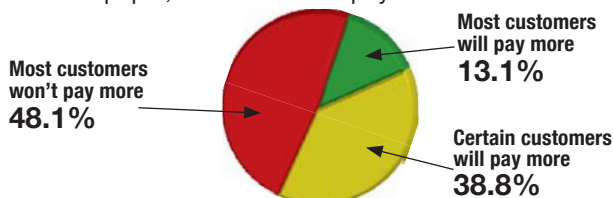
How important is it to your parent organization that the paper you use is environmentally responsible?



* e.g., Customer-driven, unwilling to pay more

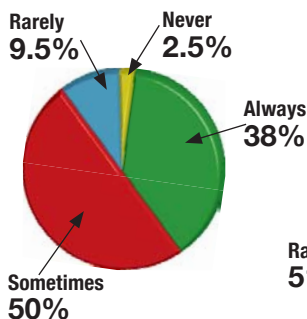
More Green for Green?

Customers may like the idea of using recycled or certified paper, but most won't pay more for it.

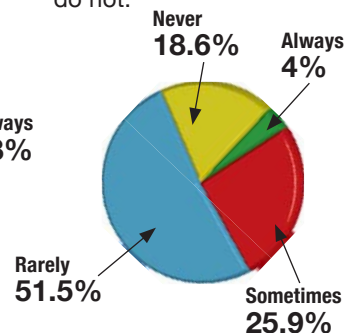


Brand Name Paper?

In-plants often specify paper by brand name...



...Though their customers do not.



Shopping Around

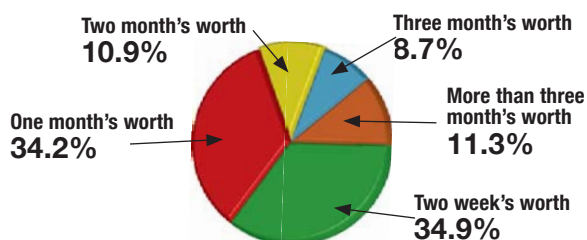
Most rely on multiple merchants to get the best deals.

More than one paper merchant	78.4%
A single paper merchant	19%
Office supply companies	16.1%
Retail paper store	4.4%
Direct from mill	3.3%
Online suppliers	5.9%
Manufacturers' paper sample books	2.9%
Other*	3.3%

* e.g., National accounts, state bids, Costco

Reducing Inventory

Here's how much paper in-plants keep on hand.



Paper Storage

Production floor paper storage is up 13% since 2011, while storage in a separate room dropped 13.5%.

Floor of production area	49.8%
Shelves in production area	48%
Room separate from production area	38.9%
Climate-controlled stock room	25.1%
Other*	7.3%

* Warehouse, climate-controlled production area, vault, vendor warehouse