

# The write stuff

The stationery and office supplies category is vast. Incorporating locally manufactured ranges, budget options imported from China and Korea, luxury imports from Europe and North America, and everything in between, it's an exciting market.

In 2020, the Covid-19 lockdown was instrumental in driving the work-from-home trend and forced home schooling on a vast number of under-prepared families. There was a mad scramble for stationery, arts and crafts products, and office supplies. And then the world settled into what is fast becoming the new normal. Home-office set ups are taking shape while remote learning finds its feet. In addition, digitisation has shifted stationery and office supply requirements. Stationery needs are clearly changing, but to what extent does this affect the retail space?

## Who is your target market?

Retailers should still be stocking stationery items and office supplies, albeit targeted for their catchment area and customer base of schools, universities, residential homes and complexes, office parks, large corporates, industrial and business areas, and small traders selling onto the end consumer. The secret is to understand the needs of each customer segment, to maintain and adjust the range and stock levels accordingly.

## Work from home

The Covid pandemic has forced a revision of the traditional office-based model. Many businesses



“ Stationery needs are clearly changing, but to what extent does this affect the retail space? ”

have discovered that their employees are equally productive, and sometimes even more so, when based at home. Remote working is a far more sustainable practice than previously thought, and even for companies that might prefer their

employees to be on-site, continued safety concerns mean that a full migration back to the office is unlikely to happen soon.

It is for this reason that global and local businesses, including Shopify and Twitter, are





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providing their remote workforce with a stipend or reimbursements to cover at-home office supplies – and this covers everything from paper, pens, and printer ink, to desks, chairs, cushions, and laptop stands.

In some cases, an entire office set-up is required, particularly if the employee is going to continue working from home or is self-employed. In this case a full complement of stationery and office supplies is necessary – from cabinets and office furniture, files, and labelling, all the way through to mouse batteries, punches, and staplers. For those who have returned to the office, office supplies and stationery requirements may have also shifted as the company moves to more digitised or sustainable solutions.

### The paperless office

Environmentally aware offices and individual consumers are driving the paperless office movement in an attempt to minimise their carbon footprint and produce less waste. In other cases, cost-cutting measures, efficiency initiatives, and technological innovations are encouraging paper-free workspaces.

For those who cannot go completely paperless, sustainable paper suppliers and recyclable materials are increasingly on-trend. This is offset by a growing middle class, a rising adult literacy rate, and an increasing number of consumers where price is the driving factor and the option of going paperless, or using sustainable supplies, is just too expensive.



The Protection of Personal Information Act (POPIA) has also affected the growth of the paperless office. For certain businesses, the repercussions of a data leak are so serious that no hard copies of data are permitted, and everything must be actioned, recorded, and stored online.

### Back to (home) school

Of the parents we spoke with, most agreed that their home-schooling stationery requirements were less than what they would have had to provide according to stationery lists provided by schools.

In most cases, this was due to a reduction in loss – It's a lot harder for children to lose their stationery at home than it is for them to misplace it at school.

For many, school stationery lists are still the driving force behind their stationery purchases. Government schools have been sending work home via WhatsApp, and this requires students to have a full complement of school stationery at home.

That said, back to school needs vary wildly from age group to age group, and from rural to government to private school. This is where understanding your target market comes into play.

### Digital transformation?

As a developing country, South Africa is behind in terms of equitable access to technology such as tablets, laptops, and personal PCs. Internet access is still out of reach for many rural learners, which means traditional stationery at affordable prices remains in demand. This demand is set to increase as government works to increase access to schooling for underprivileged and rural learners of all ages.

Private schools have been moving away from traditional paper notebooks and towards digital and online learning for some time now. Over the past year and a half, repeated school closures have seen a surge in online learning.

One teacher we spoke with commented that in the current situation, all the stationery she needs to do her job as a high school teacher is a red pen. Notes are sent digitally, classes are held online,

and even tests are taken and marked online. Similarly, her students may choose to take notes by hand, but many prefer to use some form of technology to do so, making their stationery requirements negligible and based mainly on personal preference. Of course, this may change according to the lockdown situation, but the move towards digitisation is and will continue to march on.

**Need versus want**

Stationery is a strange beast – some people use the bare minimum, while others covet and collect. In our mini consumer survey, several consumers admitted to buying more stationery than they needed simply for the pleasure of it.

Higher-end pens and notebooks were cited as ‘want’ purchases rather than ‘need’ purchases, with parents and teachers alike claiming that girls tend to enjoy stationery more than boys.

Price is a driving factor for many, but for those who can afford it, quality can also be important, and a fair number of consumers are prepared to pay more for a higher quality product. This is as applicable for notebooks and pens as it is for bigger ticket items.

For the consumer whose business depends on it, a reliable printer with good after sales support is preferable to a cheap and chirpy machine.

For people forced to WFH, home office set-ups have become vital, and consumers are prepared to pay for comfort in the form of ergonomic chairs, height-adjustable desks, foot rests, and laptop stands.



**Stationery as a destination driver**

As the demand for quality products increases, so too does the opportunity to create a destination shop with a carefully selected range of high-quality or bespoke stationery. A few key products that answer basic office needs are ideal – most consumers we spoke with mentioned pens, clutch pencils and lead, and notebooks as their most frequently used stationery items.

Typo recycled paper notebooks



Takealot stationery set

**The Covid effect**

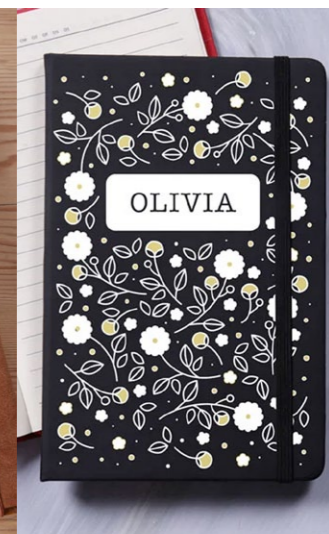
A potential blow to the stationery market was dealt by the pandemic in the form of earnings and job losses. For consumers on the bread line, feeding their families takes precedence over school fees and stationery lists. For those who have lost their jobs or been furloughed, the need for stationery at home is greatly diminished. But whether this will have a long-term effect on the market is still to be seen.



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# Back-to-School is bigger than ever

The global pandemic and subsequent lockdowns that followed were able to change the way schools, offices and workspaces operated. With many learners and professionals either opting to or being forced to work from home, a shift has been made to the digitization of the learning/work process and flow.



Aimed at building a lasting trade partnership, Freedom Stationery prioritises easy and convenient stock replenishment with extensive merchandising, point-of-sale and marketing support.

1m, 2m, 3m or 5m drops are available to suit your store, featuring fast-moving items with fantastic margins.

Despite this, there continues to be a demand in stationery and office supplies, especially in the build-up to back-to-school this year.

Learners attending online classes from home in particular, has resulted in an increased demand for equipment and supplies that would simulate the "in-class experience". Whilst stand-alone desks, monitors, chairs, keyboards, and classroom equipment have understandably enjoyed increased sales during the new normal. The industry has seen a high demand for the traditional office and stationery supplies. These range from basic paper products, writing instruments, school, home stationery to arts and craft supplies.

Marlin's extensive range of everyday stationery with an emphasis on providing "Real Good Value" by offering high quality products at competitive prices is perfectly positioned to meet this demand, with a host of supporting brands that are geared toward consumer needs.

*This, in essence, means that the demand has not changed for the back-to-school season. If anything, it has increased, and retailers should work towards meeting this demand by stocking stationery items and office supplies, particularly product ranges that are geared more specifically to their market.*

Marlin doesn't just provide the stock, but presents an entire offering that has been designed to serve as an end-to-end solution for every stationery department.



Marlin and Freedom Stationery welcome you to get in touch for more information on how to take advantage of the increased demand and how best we can make our brands work for you.

[www.freedomstationery.co.za](http://www.freedomstationery.co.za)



Basic school stationery is a guaranteed market, and as these requirements differ between age groups, but change very little year on year, retailers can easily base their stock on the stationery lists of local schools. A word of warning though: if you are going to offer a stationery range, do so reliably and consistently.

Retailers face stiff competition from specialist stores, forcing a cost versus quality standoff. Retailers can often afford to cut prices, or offer a lower-cost range, whereas speciality stores must also cater to consumers looking for high-end or unique solutions, gifts, and luxury items.

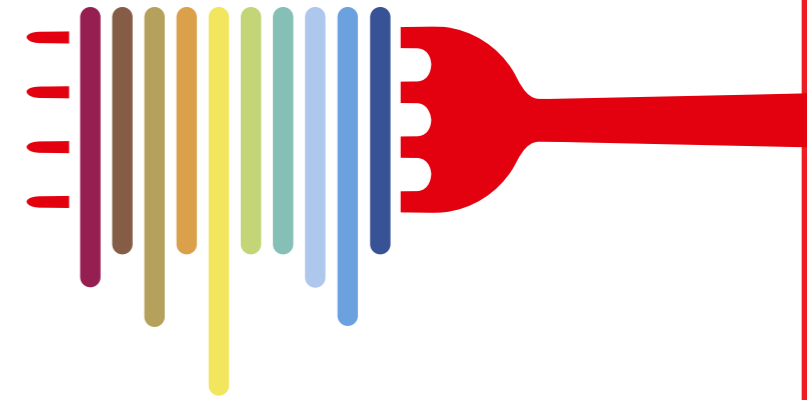
A Typo or Cotton On notebook may cost more than an own-brand exam pad, but certain consumers are willing to pay for a fun, quirky, or themed product. Speciality suppliers such as Waltons or Makro offer a one-stop home-office shop and also provide discounts on bulk purchases for smaller offices. Larger companies may also go direct to suppliers for the majority of their on-site office equipment and stationery needs.

### Buying habits

- Online sales have taken off during the pandemic, as consumers try to shop safely, keep socially distanced, and manage their time effectively. It is for this reason that online retailers such as Takealot have made inroads into the stationery and office supplies market.
- Following suit, retailers and speciality suppliers have had to up their online shopping and collection or delivery options. As restrictions loosen, consumers who enjoy the visceral shopping experience return to stores but may still use online shopping as a convenience measure.
- Certain times of the year, particularly the back-to-school rush, result in loss-leading deals on stationery being offered to draw customers into the store. The hope here is that the deals on offer are good enough to encourage shoppers who will then complete the bulk of their shopping in-store. This approach may not be as effective in the future, however, with online shopping making it far easier for consumers to be picky about what they buy from where.

### What to stock

With an overwhelming array to choose from, retailers often turn to own-brand products and traditional favourites



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that enjoy brand loyalty from consumers.

Understanding the needs of your customer base is vital to stocking the correct array of stationery and office supplies, while also taking into account the competition from speciality suppliers and online outlets. Stores with a lower LSM base must remain price-driven, whereas stores with a consumer base that has more disposable income can look at a more varied offering.

### South Africa as a growing market

An article on the Africa Business Pages website suggests that we can expect to see growth in the 2020 – 2026 period in the stationery and office supplies category, at an international level as well as the local one.

The article says, "According to a recent report issued by the Emirates Industrial Bank Journal, demand for stationery and allied paper products has seen a growth of almost 27 per cent in the last two years." A major portion of the increased imports of stationery products has been attributed to the increasing demand for these products in Dubai's re-export markets, (e)specially the emerging markets in Africa.

Dubai wholesalers offer African retailers a comprehensive range of stationery products, at a range of prices. Cheap imports from China, Korea, and Hong Kong are as readily available as higher-quality products from Europe, North America, and Asia. They also allow retailers to buy only what they need, instead of having to commit to a set container load directly from the manufacturers.



The African Business Pages article goes on to say that "Industry experts believe that African markets are extremely price sensitive and most of the requirements originating from Africa are for low priced goods – quality being a secondary consideration." It does, however, point out that South Africa is becoming known as a major destination for stationery products, with the country emerging as one of UAE's leading trading partners in the region. The report also says that South African consumers are no longer satisfied with poor quality products and are willing to pay good prices for quality products.

#### Sources:

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### CNA – A case study

The journey of CNA exemplifies the pitfalls associated with being a speciality store with too many specialities. Their recent rebirth, however, shows a renewed focus on stationery and home-schooling. The CNA website states that the chain has "embarked on a 5-year growth plan focussed on smaller store/shop sizes in convenient locations to better serve the broader South African customer."

In addition to this they have narrowed their focus to a full range of "scholastic, home office and fashionable on trend items," as well as an improved arts and crafts offering (no doubt fuelled by increasingly desperate parents faced with prolonged home schooling and the entertainment of younger children).

They are also undertaking to provide a comprehensive early childhood development (ECD) range. Whether this strategy will work remains to be seen, as nobody predicted the impact Covid-19 would have on retailers and the economy as a whole. **SR**



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