

CATEGORY RESOURCE GUIDE

Sanitary paper products

Included in this document

(Click to view each section)

Market landscape

Manufacturing insights

- [Product overview](#)
- [Selection factors](#)
- [OEM and manufacturing locations](#)
- [Raw materials](#)
- [Regulatory and approvals](#)
- [Non-awarded suppliers](#)

Logistics insights

- [Transportation/shipping](#)
- [Product storage](#)

Utilization insights

- [Clinical contract support resources](#)

Building supply assurance

- [Potential supply vulnerabilities](#)
- [Conservation strategies](#)
- [Supply chain programs](#)
- [Planning for disruptions](#)

Vizient award overview

Awarded suppliers

FM0391 – Essity
FM0392 – Georgia-Pacific
FM0393 – Kimberly-Clark

Distribution

Distributed through the following distribution channels:

Facilities management
Food
Medical-surgical



Want to receive weekly Supply Assurance updates?

Update your preferences through our [Subscription Manager](#) by selecting Supply Assurance Weekly Digest.

Questions? Contact supplyassurance@vizientinc.com, pharmacyquestions@vizientinc.com, novaplus@vizientinc.com.

DISCLAIMER: THE INFORMATION CONTAINED IN THIS DOCUMENT IS INTENDED FOR INFORMATIONAL PURPOSES ONLY AND IS IN NO WAY INTENDED TO BE A SUBSTITUTE FOR OR IN ANY MANNER TO BE CONSTRUED AS MEDICAL OR CLINICAL ADVICE. VIZIENT IS COMPILING INFORMATION AND EMERGING PRACTICES FROM MEMBERS TO AID IN KNOWLEDGE TRANSFER DURING CRITICAL SUPPLY EVENTS. THE INFORMATION CONTAINED HEREIN HAS NOT BEEN INDEPENDENTLY VERIFIED, RESEARCHED, OR INVESTIGATED AND SHOULD NOT BE CONSTRUED AS ADVICE OR A RECOMMENDATION. DECISIONS REGARDING WHETHER AND HOW TO UTILIZE ANY OF THESE PRACTICES SHOULD BE MADE BY HEALTH CARE PROVIDERS, AT THEIR OWN RISK, WITH CONSIDERATION OF INDIVIDUAL CIRCUMSTANCES. AS INFORMATION IS CHANGING RAPIDLY, VIZIENT ENCOURAGES YOU TO ALWAYS REFER TO THE CDC, YOUR STATE'S DEPARTMENT OF HEALTH, AND YOUR LOCAL PUBLIC HEALTH AUTHORITY FOR GUIDANCE. VIZIENT DOES NOT PROVIDE LEGAL, REGULATORY, OR MEDICAL ADVICE AND DISCLAIMS LIABILITY OR RESPONSIBILITY FOR THE ACCURACY, COMPLETENESS, AND/OR CLINICAL EFFICACY AND SAFETY FOR THE PRODUCTS OR PROCESSES CONTAINED HEREIN. MEMBERS SHOULD SEEK THEIR LEGAL COUNSEL'S ADVICE ON LOCAL, STATE, AND FEDERAL LEGAL/REGULATORY MATTERS.

Making supply uncertainty a thing of the past, not the future

To help members maintain supply assurance for essential products, Vizient shares insights via [category resource guides](#) on vizientinc.com. These category-specific documents contain comprehensive manufacturing, logistics and utilization insights to help members source supplies with confidence. Category resource profiles are one way we're [building supply assurance together](#).

Market landscape

Sanitary paper manufacturers produce numerous paper goods, including toilet paper, paper towels, facial tissues and napkins. Sanitary paper product manufacturers are increasingly focused on sustainable sourcing for raw materials and providing more eco-friendly options. These raw materials include wood pulp and recycled fibers/recovered paper.

Manufacturing insights

Product overview

The products include table napkins and tablecloths, toilet paper, paper towels, facial tissues, sanitary napkins and applicable dispensers. The products are made of recycled paper pulp, hardwood and softwood.

Selection factors

Sanitary paper product selection factors should align with the organization's infection control protocols, budget constraints and sustainability goals. The primary consideration is the products' ability to maintain a hygienic environment and prevent cross-contamination. This would include ply layers and absorbency.

Sustainability – Many organizations are adopting eco-friendly practices choosing products with recycled fibers/paper to align with environmental goals.

OEM and manufacturing location

The sanitary paper product manufacturing industry has a moderate level of globalization.

Today, the industry experiences a moderate but growing level of globalization in trade. Product imports from Canada, China and Mexico grew substantially during the current period, particularly in the low-cost product segment. On the other hand, exports fell sharply during the same period, which has pressured domestic operators. U.S.-based operators maintain technological leadership in the industry and continue to dominate high-end products, although emerging market competitors have improved the average quality of their products during the past five years.

- Georgia-Pacific manufacturing locations found [here](#)
- Kimberly-Clark Professional manufacturing locations found [here](#)
- Essity Professional manufacturing locations found [here](#)

Raw materials

Raw materials utilized in this category include wood pulp and recovered paper.

Wood pulp is the primary raw material for sanitary paper products, typically sourced from softwood and hardwood trees. Increases in the price of wood pulp adversely affect industry growth. In 2021, the price of wood pulp increased significantly. In 2023, the price has increased at a much slower rate, posing a potential threat to the industry.

Recovered paper is also used in sanitary paper in varying degrees to reduce environmental impact.

The latest manufacturing insights are available [here](#).

Regulatory and approvals

Manufacturers must adhere to government regulations and industry standards related to hygiene and product safety.

Non-awarded suppliers

Solaris Paper Inc.

Proctor & Gamble Co.

Logistics insights

Transportation/shipping

Sanitary paper products are transported via domestic trucking, rail and occasionally air.

All contracted suppliers maintain a network of distribution centers strategically located throughout the U.S.. All suppliers utilize various transportation modes, including trucks, railroad, and in some cases, intermodal transportation, to move their products from manufacturing facilities to distribution centers.

The Southeast U.S. houses the majority of pulp mills, with Georgia leading the region. The Great Lakes region houses the second most pulp mills.

Products are primarily provided via a distribution channel; however, opportunities for direct purchase are currently being developed.

See additional freight update [here](#).

Product storage

No specific storage requirements.

Utilization insights

Clinical contract support resources

N/A

Building supply assurance

Potential supply vulnerabilities

Raw material availability: Sanitary paper products production relies on a steady supply of wood pulp or recycled paper. Disruptions in the availability or cost of these raw materials due to factors like natural disasters, supply chain interruptions or price fluctuations can impact production.

Transportation disruptions: Sanitary paper products require long-distance transportation from manufacturing facilities to distribution centers. Transportation disruptions such as strikes, fuel shortages or extreme weather events can lead to delays.

Labor shortages: Manufacturing plants for sanitary paper products require skilled labor for machine operation and quality control. Labor shortages due to labor disputes, pandemic-related issues or other factors can affect production capacity.

Energy costs: Sanitary paper production is energy intensive. Fluctuations in electricity and natural gas prices can impact manufacturing costs.

Conservation strategies

Because predicting the next supply shortage is impossible, it is important that healthcare providers not only adopt and implement care practices strategies to conserve critical products and supplies, but it is equally as important to sustain leading practices that will help ensure the availability of essential products post recovery and in the future. For example, some hospitals have reported decreasing their IV solution use by as much as 50% in some care areas by continuing to adhere to the conservation strategies implemented during the recent shortages.

Healthcare providers and other leading organizations have identified and recommend the following actions:

Additionally, with other products and services:

- Assess and identify all hospital services.
- Identify and list critical products, supplies, and resources required to sustain operation of those areas identified and ranked in the first step.

- Maintain the internal planning team document with accurate information. Review and update the document on a routine basis with current employee contact information. If a team member no longer works in the organization, identify the replacement and communicate the information to all stakeholders.
- Communicate practice changes and procedures frequently to staff and stakeholders.
- Hold regularly scheduled planning meetings in the absence of a supply chain shortage or event. This will help to ensure that identified processes and protocols remain relevant and any issues requiring revisions and/or updates are addressed in advance of a shortage or disaster.

If your organization has implemented conservation strategies for sanitary paper or any other category, share your information [here](#). The information you share will be anonymous unless you grant Vizient permission to share.

Supply chain programs

Essity, Georgia-Pacific and Kimberly-Clark participate in the Impact Support Services Standardization Program, which improves procurement processes on commonly purchased products and financially rewards standardization efforts while reducing product variation and improving procurement processes on commonly purchased products. Since 1996, members have earned more than \$1.5 billion in cash rebates through the programs. With 12 programs to choose from and built-in flexibility within each program, it's easy to gain additional value beyond price for your organization. For more information, click [here](#).

Planning for disruptions

Distributor recommendations

Evaluation of alternative brands and offerings

Best practice strategies

Vizient offers the following best practices to help members manage disruptions. These suggestions are available to help you gain insight on how the industry is managing supply challenges.

If your inventory is low

Vizient is committed to bringing hospitals, manufacturers, distributors and the industry together to talk about this issue and any long-term implications. We feel continued dialogue around the issue by experts – hospitals, manufacturers, distributors and industry – will be crucial to ultimately arriving at a solution to vexing issues. During critical supply periods, members should continue to order their normal levels of products in order to ensure continued availability for all institutions.

If you begin to experience a shortage:

- Evaluate your current supply.
- Contact your local supplier representative and report exactly how many days' supply you have left.
- If you are not getting a response from suppliers, contact Vizient so we can facilitate communication between member and supplier; provide whether you are ordering direct or through distribution (medical/surgical or pharmacy), and indicate supplier and distributor (if applicable) when you contact Vizient.
- We encourage you to continue the conversation within your organization, with your peers and with the manufacturers and distributors to identify ways to manage your ongoing needs.
- Submit inquiries to disasterresponse@vizientinc.com.

Expedite supply resolution

To expedite resolution for supply issues, contact your local supplier and provide the following information:

- The description and item number of the product that is experiencing a shortage
- Whether you are purchasing directly or through an Authorized Distributor
- Days' supply remaining in your inventory

If expanding your facility

We suggest members notify suppliers when expanding their facilities to assist in planning and anticipate increases in allocations. You should consider notifying your suppliers at least three months ahead of the completion of your facility to ensure sufficient capacity.

Building supply assurance together

Collaboration among suppliers, distributors, members and Vizient strengthens the assurance of supply for all stakeholders. Our wealth of experience, actionable data and predictive planning helps to strengthen supply assurance. Further, our work with stakeholders focuses on improving supply chain risk mitigation as we collaborate to enhance data, increase supply visibility and expand inventory access.

Four themes keep us centered and are the pillars of our supply chain assurance efforts: insights, access, enablement and advocacy. [Learn more about our supply assurance strategy.](#)

In the event of a supply disruption, Vizient will publish a [product disruption brief](#) to the [Supply Assurance webpage](#). Curated by Vizient experts, these documents provide a summary of current conditions and strategies to manage product-level disruptions.

In addition to our disruption briefs, Vizient also compiles all known disruptions into the monthly [Supply Update Executive Summary](#) which tracks all supply chain disruptors, including current market challenges, category-specific product updates and recovering markets.

Whether a supply disruption is the result of a natural or human-made disaster, it is imperative that members are informed. The [Vizient Disaster Preparedness webpage](#) was developed to help providers meet supply chain needs before, during and after an event. The Supply Update section of the guide is updated on a frequent and routine basis with communication from all awarded suppliers that have manufacturing facilities in areas impacted by a disaster. Additionally, a status update list of those manufacturers whose operations have been affected, as well as a list of impacted product(s), will be maintained and updated as that information is received from supplier.

The importance of an internal planning team

Identifying an internal planning team is imperative to managing supply, mitigating risks and sustaining operations during a supply shortage. According to [the Supply Chain Disaster Preparedness Manual](#) developed by the Centers for Disease Control and Prevention (CDC), internal teams should consist of representatives from supply chain, purchasing, emergency management, each clinical/care delivery area, inventory staff, receiving and distribution staff. Relative to medication and solutions, Vizient member feedback indicated the pharmacy department as an integral member to the internal team, as clinical/pharmacy practice changes may occur. Additional members may include the facilities safety manager, security, risk management, legal, marketing and communications, and public relations.

A simple internal team planning document will help to identify, contact and quickly convene relevant team members. See the sample below:

Name	Title	Department/role	Phone	Email

Once an internal team is identified, additional considerations before beginning the development and implementation of a recovery plan include the following:

- The team's goals
- The responsibilities of each planning team member
- Other department/team members who may need to be involved
- Frequency of team meetings
- How the goal/mission will be accomplished
- How information will be documented and communicated to the broader audience
- A current framework for success either within your facility or from a leading organization

Stakeholder communication

During supply chain product disruptions, it is vital that accurate and timely information is disseminated to internal and external stakeholders. The following actions should be considered in an effort to facilitate and ensure informed decisions:

- Designate the point person or persons who will be responsible for developing, disseminating and monitoring all communications coming from the internal planning team.
- The internal planning team should collaborate key messages/information to stakeholders, such as changes in policies and/or practice changes.
- Clearly communicate the roles and responsibilities of all staff based on the agreed upon recovery plan. If there are changes to the plan at any time, timely communication of those changes will help to increase risk mitigation and minimize interruption of patient care.
- Establish communication mechanisms for information exchange. Examples include but are not limited to regularly scheduled briefings and meetings, in-services, staff trainings, live/recorded webinars, memos and emails.
- Determine the frequency of reminders and updates regarding supply disruption status and anticipated resolution.
- Frequent updates and reminders after a supply disruption has been mitigated or eliminated help to ensure ongoing success and sustainability of best practices.

Supply management and logistics

A leading practice identified in managing recent shortages is a centralized management approach of impacted product codes. A key responsibility of the internal planning group is to identify all affected product codes and to determine the amount of supply on hand, expected and any allocation protocols implemented by the supply source. Once the current product status is determined, the following actions are recommended:

- Update and maintain an accurate inventory list. Each care area that utilizes any product code on the inventory list should identify a point person to collect on hand and usage levels on an agreed upon frequency. That information should be reported back to the internal planning team. Inventory can either be managed by care delivery areas or in a centralized manner.
- Identify space in the facility to store, manage and distribute product. Designate authorized personnel responsible for maintaining the inventory (expiration dates temperature, ventilation, utilization, equipment maintenance and repair, etc.).
- Develop and seek approval for the inventory management protocol and communicate this information to all stakeholders.
- Update and maintain accurate purchase order and allocation protocols from the contracted supplier and your group purchasing organization (GPO).
- Update and maintain accurate emergency contact information for all suppliers as well as internal stakeholders. This process should be done at least every six months.
- Review the inventory management status on an agreed upon frequency with the internal planning group. Assess for barriers to its effectiveness, implement any changes necessary and communicate those changes to all stakeholders.

Planning for all levels of care and ancillary products

Feedback from lessons learned indicated the need to include all levels of care and ancillary products, if applicable, in the conservation plan. If your provider system has children's hospitals, ambulatory surgery centers, outpatient clinics and/or long-term care facilities, utilization and logistics of products and supplies must be incorporated into the plan. Additionally, it is vital that ancillary products are considered when contemplating allocations and purchase orders. For example, during the recent drugs and solutions shortages, as large volume solution bags went on back order, smaller volume bags, compounding products, and syringes also went on back order because of practice changes. Therefore, conservation planning should include actual and the additional ancillary products that may be required to sustain a clinical and/or operational practice change.



To learn more, please contact:
Kylie Taylor, Dir., Assurance.,
supplyassurance@vizientinc.com.

As the nation's largest member-driven health care performance improvement company, Vizient provides solutions and services that empower health care providers to deliver high-value care by aligning cost, quality and market performance. With analytics, advisory services and a robust sourcing portfolio, we help members improve patient outcomes and lower costs.