April 2019

HP Workforce Sustainability Survey

Global Insights Report
METHODOLOGY

WHAT
The HP Workforce Sustainability Survey is an online survey in 10 markets among three audiences.

WHY
The survey looks at attitudes towards, satisfaction with, and impact of an individual’s workplace environment, its sustainability, safety, as well as awareness and perceptions of counterfeit / clone cartridges.

HOW
20-minute online survey fielded between January 31 and February 25, 2019.
METHODOLOGY

WHO WE REACHED OUT TO

Sample sizes listed are per country

General population
1,000 interviews per country

Office workers
500 interviews per country

Office supplies decision makers
500 interviews per country
(Broken down by 200 office managers, 150 ITDMs, and 150 business owners)
KEY FINDINGS
Office workers are not only more likely to leave companies that don’t implement sustainable business practices, they will also speak out on public forums—turning internal issues into external reputational damage.

Office supplies should play a key role in a workplace’s commitment to sustainability and safety—yet, office decision makers’ lack of knowledge causes a lack of priority around the sustainability and safety of cartridges. Offices are producing a lot of completely avoidable cartridge waste despite the large majority of office decision makers knowing that cartridges are recyclable.

There is a lot of misinformation floating around. About half of consumers and office decision makers are not aware of the impact non-Original cartridges have on the environment, and that not all cartridges are created equal.

Fueled by lack of information, and lack of agency, office supplies decision makers are unintentionally breaking the trust of their fellow office workers by purchasing non-Original cartridges. Office decision makers don’t necessarily feel it’s their responsibility to promote and enforce sustainability within the office, perhaps one of the reasons they continue to purchase non-Original cartridges for their office printers. However, this creates a breach of trust with office workers, most of whom trust their offices are NOT purchasing non-Original cartridges.

Among the general population, ignorance is breeding complacency. Unaware and unconvinced of the impact of non-Original cartridges, consumers will keep purchasing them.

The issue of non-Original cartridges is not just within offices. Consumers around the world demonstrate they don’t understand the impact of cartridge waste and the benefits of Original cartridges. As a result, many don’t plan on avoiding purchasing non-Original cartridges in the future.

Vocalizing its commitment to preventing ink cartridge waste is good business for HP. Brands are being called into action to address the environmental impact of their products, and this includes ink manufacturers. Consumers give HP permission globally to speak up and warn consumers about the risks of non-Original cartridges, which poses little risk to HP since most say they’re willing to pay more for products from companies that demonstrate their commitment to reducing their environmental impact.
DETAILED FINDINGS
SUSTAINABILITY IN THE WORKPLACE IS NO LONGER OPTIONAL—OFFICE WORKERS AROUND THE WORLD EXPECT IT FROM THEIR EMPLOYERS
FOR MOST OFFICE WORKERS, SUSTAINABILITY IN THE WORKPLACE IS AS IMPORTANT AS DIVERSITY AND INCLUSION

6 IN 10 office workers think ignoring sustainability in the workplace is as bad as ignoring diversity & inclusion (56%)
“Ignoring sustainability in the workplace is as bad as ignoring diversity & inclusion”

56%
FOR MOST, SUSTAINABILITY IS NOW A HYGIENE FACTOR

NEARLY HALF OF Office workers agree that...

I don’t demand sustainability from my employer because I expect them to already have sustainable business practices (48%)

Companies that don’t focus on sustainability don’t deserve to be in business (43%)

6 IN 10 Office workers agree that...

Sustainability is no longer a nice to have for companies, it’s a need to have (61%)

Sustainability is key to engaging the workforce of the future (58%)
SUSTAINABLE PRACTICES ARE NOW TABLE STAKES FOR MANY AROUND THE WORLD – AN EXPECTATION, NOT A CHOICE

- Sustainability is no longer a nice to have for companies, it’s a need to have (61%)
- Sustainability is key to engaging the workforce of the future (58%)
- I don’t demand sustainability from my employer because I expect them to already have sustainable business practices (48%)
- Companies that don’t focus on sustainability don’t deserve to be in business (43%)

% of individuals who agree

This is especially true in emerging economies
AN EMPLOYER’S SUSTAINABLE BUSINESS PRACTICES DIRECTLY IMPACT THEIR ABILITY TO HIRE AND RETAIN TOP TALENT
POOR SUSTAINABILITY PRACTICES AFFECT RECRUITMENT, RETENTION, AND ADVOCACY

**NEARLY HALF** agree **TOP TALENT** will only want to work at companies that implement sustainable business practices (46%)

**4 IN 10** agree I would **LOOK TO CHANGE JOBS** if the company I worked for didn't implement sustainable business practices (40%)

**6 IN 10** vs **OVER 9 IN 10**

Office workers who feel their employer is behind others in sustainable practices would recommend their workplace (62%)

Office workers who feel their employer is ahead of others in sustainable practices would recommend their workplace (96%)
“Top talent will only want to work at companies that implement sustainable business practices” 46%

“Sustainability is a major factor for me when choosing what company to work for” 45%

“I would be less likely to take a job at a company if they didn’t implement sustainable business practices” 44%

Recruitment
Retention
Advocacy

SUSTAINABILITY IS PARTICULARLY ATTRACTIVE TO TALENT IN EMERGING ECONOMIES

Q8: How much do you agree or disagree with the following statements? (top 2 box reported), Q10: How much do you agree or disagree with the following statements? (top 2 box reported) // Base sizes: Global OWs = 5001, Canada OWs = 500, China OWs = 500, France OWs = 501, Germany OWs = 500, India OWs = 500, Italy OWs = 500, Mexico OWs = 500, Spain OWs = 500, Spain OWs = 500, UK OWs = 500, US OWs = 500
COMPANIES THAT AREN’T SUSTAINABLE RISK LOSING A SIGNIFICANT NUMBER OF THEIR EMPLOYEES—UP TO TWO THIRDS FOR CHINESE EMPLOYERS

I would look to change jobs if the company I worked for didn’t implement sustainable business practices

% of individuals who agree

<table>
<thead>
<tr>
<th>Country</th>
<th>Recruitment</th>
<th>Retention</th>
<th>Advocacy</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>64%</td>
<td>52%</td>
<td>40%</td>
</tr>
<tr>
<td>India</td>
<td>63%</td>
<td>42%</td>
<td>34%</td>
</tr>
<tr>
<td>Mexico</td>
<td>52%</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>Italy</td>
<td>42%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>Spain</td>
<td>34%</td>
<td>32%</td>
<td>31%</td>
</tr>
<tr>
<td>France</td>
<td>32%</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>US</td>
<td>31%</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Canada</td>
<td>31%</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>UK</td>
<td>31%</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Germany</td>
<td>25%</td>
<td>31%</td>
<td>25%</td>
</tr>
</tbody>
</table>
BEING AHEAD IN SUSTAINABILITY MEANS POSITIVE RECOMMENDATIONS FOR AN EMPLOYER

6 IN 10
Office workers who feel their employer is *behind* others in sustainable practices would recommend their workplace (62%)

OVER 9 IN 10
Office workers who feel their employer is *ahead of* others in sustainable practices would recommend their workplace (96%)

APAC*  96%  69%
North America  96%  65%
EMEA  95%  57%
OFFICE WORKERS ARE NOT ONLY MORE LIKELY TO LEAVE COMPANIES THAT DON’T IMPLEMENT SUSTAINABLE BUSINESS PRACTICES, THEY WILL ALSO SPEAK OUT ON PUBLIC FORUMS—TURNING INTERNAL ISSUES INTO EXTERNAL REPUTATIONAL DAMAGE
OFFICE WORKERS ARE NOT ONLY MORE LIKELY TO LEAVE COMPANIES THAT DON’T IMPLEMENT SUSTAINABLE BUSINESS PRACTICES, THEY WILL ALSO SPEAK OUT ON PUBLIC FORUMS—TURNING INTERNAL ISSUES INTO EXTERNAL REPUTATIONAL DAMAGE

“If the company I worked for had poor sustainability practices, I WOULD LEAVE THEM A BAD REVIEW to warn others (e.g., on Glassdoor)”

% of individuals who agree

- India: 62%
- China: 61%
- Mexico: 50%
- Italy: 41%
- Spain: 36%
- Canada: 32%
- France: 31%
- US: 29%
- UK: 24%
- Germany: 22%

Q10: How much do you agree or disagree with the following statements? (top 2 box reported) // Base sizes: Global OWs = 5001, Canada OWs = 500, China OWs = 500, France OWs = 501, Germany OWs = 500, India OWs = 500, Italy OWs = 500, Mexico OWs = 500, Spain OWs = 500, UK OWs = 500, US OWs = 500
MILLENNIAL OFFICE WORKERS GLOBALLY ARE PARTICULARLY LIKELY TO SPEAK OUT IF THEIR EMPLOYER HAD POOR SUSTAINABILITY PRACTICES

- If the company I worked for had poor sustainability practices, I WOULD LEAVE THEM A BAD REVIEW TO WARN OTHERS (e.g., on Glassdoor) - 44%
- I would LOOK TO CHANGE JOBS if the company I worked for didn't implement sustainable business practices - 45%
- If I discovered the company I worked for was causing harm to its employees due to its choice in the quality of its office supplies, I WOULD SPEAK OUT PUBLICLY AGAINST THEM - 49%
- I would be LESS LIKELY TO TAKE A JOB AT A COMPANY if they didn't implement sustainable business practices - 47%
- If I discovered the company I worked for was causing harm to the environment due to its choice in the quality of its office supplies, I WOULD PETITION FOR LEGAL ACTION - 41%
- If I discovered the company I worked for was causing harm to the environment due to its choice in the quality of its office supplies, I WOULD SPEAK OUT PUBLICLY AGAINST THEM - 43%
44% of Millennial office workers agree if the company I worked for had poor sustainability practices, I WOULD LEAVE THEM A BAD REVIEW to warn others (e.g., on Glassdoor) (vs. 34% for Gen X office workers). This is especially true in the US, Spain, and Mexico.
SUSTAINABLE PRACTICES IN THE WORKPLACE DON’T JUST IMPACT THE HIRING AND RETENTION OF TOP TALENT—THEY IMPROVE EMPLOYEE PERFORMANCE AND GENERAL SATISFACTION.
ALL OVER THE WORLD, OFFICE WORKERS WHO FEEL THEIR WORKPLACE IS LEADING THE CHARGE IN SUSTAINABILITY ARE HAPPIER, FEEL SAFER AND MORE CARED FOR, ARE MORE PRODUCTIVE, AND ARE NOT JUST LOYAL BUT AVID ADVOCATES.

Office workers who feel their workplace is AHEAD of others in sustainability

- I feel happy in my workplace: 81% (35% disagree)
- My workplace environment is safe for my health: 85% (47% disagree)
- I feel cared about by my employer in my workplace environment: 76% (26% disagree)
- I feel I can be productive in my workplace environment: 81% (52% disagree)
- I plan to stay at my current workplace for the next year: 82% (48% disagree)
- I am an avid advocate for my employer: 72% (28% disagree)

Office workers who feel their workplace is BEHIND others in sustainability

- I feel happy in my workplace: 35% (81% disagree)
- My workplace environment is safe for my health: 47% (85% disagree)
- I feel cared about by my employer in my workplace environment: 26% (76% disagree)
- I feel I can be productive in my workplace environment: 52% (81% disagree)
- I plan to stay at my current workplace for the next year: 48% (82% disagree)
- I am an avid advocate for my employer: 28% (72% disagree)

Q2: How much do you agree or disagree with the following about your workplace? // Q4: Which of the following statements best describes you? // Base sizes: Global office workers who feel their workplace is ahead of others in terms of sustainability = 1252, Global office workers who feel their workplace is behind others in terms of sustainability = 755.
GETTING THERE—HOW CAN EMPLOYERS MEET OFFICE WORKERS’ DEMANDS?

OFFICE SUPPLIES SHOULD PLAY A KEY ROLE IN A WORKPLACE’S COMMITMENT TO SUSTAINABILITY AND SAFETY

HOWEVER, OFFICE DECISION MAKERS’ LACK OF KNOWLEDGE CAUSES A LACK OF PRIORITY AROUND THE SUSTAINABILITY AND SAFETY OF CARTRIDGES
To office decision makers’ knowledge, printer ink cartridges are not recycled in 40% of their workplaces.

% of office decision makers reporting their office does not recycle ink cartridges

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>48%</td>
</tr>
<tr>
<td>India</td>
<td>48%</td>
</tr>
<tr>
<td>Italy</td>
<td>44%</td>
</tr>
<tr>
<td>Mexico</td>
<td>43%</td>
</tr>
<tr>
<td>France</td>
<td>42%</td>
</tr>
<tr>
<td>China</td>
<td>39%</td>
</tr>
<tr>
<td>UK</td>
<td>36%</td>
</tr>
<tr>
<td>US</td>
<td>35%</td>
</tr>
<tr>
<td>Canada</td>
<td>33%</td>
</tr>
<tr>
<td>Spain</td>
<td>32%</td>
</tr>
</tbody>
</table>

Q13: To the best of your knowledge, which of the following office supplies are currently recycled in your workplace? // Base sizes: Global DMs = 5,007, Canada DMs = 500, China DMs = 505, France DMs = 500, Germany DMs = 502, India DMs = 500, Italy DMs = 500, Mexico DMs = 500, Spain DMs = 500, UK DMs = 500, US DMs = 500
73% of office decision makers know ink cartridges are recyclable

% of office decision makers that know ink cartridges are recyclable

- Canada: 80%
- US: 79%
- Spain: 78%
- UK: 77%
- France: 76%
- China: 76%
- Mexico: 69%
- India: 66%
- Germany: 64%
- Italy: 62%

Q12: To the best of your knowledge, which of the following office supplies are recyclable? // Base sizes: Global DMs = 5,007, Canada DMs = 500, China DMs = 505, France DMs = 500, Germany DMs = 502, India DMs = 500, Italy DMs = 500, Mexico DMs = 500, Spain DMs = 500, UK DMs = 500, US DMs = 500

THIS IS DESPITE THE MAJORITY OF OFFICE DECISION MAKERS KNOWING CARTRIDGES ARE RECYCLABLE
THE LACK OF ACTION IS PERHAPS LINKED TO THE LACK OF IMPORTANCE MANY DECISION MAKERS PLACE ON THE IMPACT OF CARTRIDGE WASTE

ONLY HALF agree “Ink and toner cartridge waste is a serious issue” (58%)
Besides price, what else do you consider when purchasing ink / toner cartridges?

- **Performance**: 62%
- **Brand / manufacturer**: 58%
- **Trusted source**: 52%
- **Environmental impact**: 38%

Therefore, environmental impact is not a key consideration of theirs when purchasing cartridges.
Many office decision makers purchase non-original cartridges

<table>
<thead>
<tr>
<th>Country</th>
<th>ANY NON-ORIGINAL CARTRIDGES</th>
<th>CLONE / THIRD PARTY CARTRIDGES</th>
<th>COUNTERFEIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>30%</td>
<td>39%</td>
<td>36%</td>
</tr>
<tr>
<td>China</td>
<td>36%</td>
<td>41%</td>
<td>39%</td>
</tr>
<tr>
<td>Spain</td>
<td>39%</td>
<td>43%</td>
<td>36%</td>
</tr>
<tr>
<td>US</td>
<td>36%</td>
<td>37%</td>
<td>36%</td>
</tr>
<tr>
<td>Italy</td>
<td>36%</td>
<td>43%</td>
<td>39%</td>
</tr>
<tr>
<td>France</td>
<td>36%</td>
<td>37%</td>
<td>36%</td>
</tr>
<tr>
<td>Germany</td>
<td>36%</td>
<td>37%</td>
<td>36%</td>
</tr>
<tr>
<td>Canada</td>
<td>35%</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>UK</td>
<td>32%</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>Mexico</td>
<td>25%</td>
<td>40%</td>
<td>49%</td>
</tr>
</tbody>
</table>

Q29: Do you purchase Original or clone/third-party printer cartridges for the office printers you manage? (net of “I purchase a mix of Original and clone/third party cartridges” and “I only purchase clone/third party cartridges”) / Q32: Do you think it’s possible you may have unintentionally purchased a counterfeit cartridge for office printers you manage in the past? (top 2 box reported) // Base sizes: Global DMs = 5,097, Canada DMs = 500, China DMs = 505, France DMs = 500, Germany DMs = 502, India DMs = 500, Italy DMs = 500, Mexico DMs = 500, Spain DMs = 500, UK DMs = 500, US DMs = 500.
Among those who purchase clone / third-party cartridges,

49%

say PRICE is a factor in their purchase decision

---

Q29: Do you purchase Original or clone/third-party printer cartridges for the office printers you manage? (net of “I purchase a mix of Original and clone/third party cartridges” and “I only purchase clone/third party cartridges) / Q32: Do you think it’s possible you may have unintentionally purchased a counterfeit cartridge for office printers you manage in the past? (top 2 box reported) / Q31: You mentioned you’ve purchased a clone/third party cartridge for the office printers you manage before. What features made you choose a clone/third-party cartridge?

---

EDELMAN INTELLIGENCE / © 2019

TOTAL: Global DMs = 5,007, Canada DMs = 500, China DMs = 505, France DMs = 500, Germany DMs = 502, India DMs = 500, Italy DMs = 500, Mexico DMs = 500, Spain DMs = 500, UK DMs = 500, US DMs = 500

THOSE WHO PURCHASE CLONE/THIRD PARTY CARTRIDGES: Global DMs = 5,007, Canada DMs = 237, China DMs = 301, France DMs = 283, Germany DMs = 241, India DMs = 354, Italy DMs = 293, Mexico DMs = 248, Spain DMs = 294, UK DMs = 244, US DMs = 252
THIS IS UNINTENTIONALLY CREATING A BREACH OF TRUST WITH OFFICE WORKERS—THE MAJORITY OF WHOM BELIEVE THEIR COMPANIES ARE NOT PURCHASING NON-ORIGINAL CARTRIDGES

“I trust my company is not buying clone / third-party cartridges”

61%

“I trust my company is not buying counterfeit cartridges”

64%

% of decision makers who purchase clone cartridges
% of decision makers who think it’s possible they have purchased counterfeit
% of office workers who trust their company is not purchasing counterfeit cartridges
% of office workers who trust their company is not buying clone/third-party cartridges

Spain  Italy  France  Germany  China  US  Canada  UK  India  Mexico

61%  60%  57%  61%  65%  61%  60%  66%  72%  69%
39%  41%  39%  37%  36%  43%  36%  43%  35%  40%

THIS IS UNINTENTIONALLY CREATING A BREACH OF TRUST WITH OFFICE WORKERS—THE MAJORITY OF WHOM BELIEVE THEIR COMPANIES ARE NOT PURCHASING NON-ORIGINAL CARTRIDGES

“I trust my company is not buying clone / third-party cartridges”

61%

“I trust my company is not buying counterfeit cartridges”

64%

% of decision makers who purchase clone cartridges
% of decision makers who think it’s possible they have purchased counterfeit
% of office workers who trust their company is not purchasing counterfeit cartridges
% of office workers who trust their company is not buying clone/third-party cartridges

Spain  Italy  France  Germany  China  US  Canada  UK  India  Mexico

61%  60%  57%  61%  65%  61%  60%  66%  72%  69%
39%  41%  39%  37%  36%  43%  36%  43%  35%  40%

THIS IS UNINTENTIONALLY CREATING A BREACH OF TRUST WITH OFFICE WORKERS—THE MAJORITY OF WHOM BELIEVE THEIR COMPANIES ARE NOT PURCHASING NON-ORIGINAL CARTRIDGES

“I trust my company is not buying clone / third-party cartridges”

61%

“I trust my company is not buying counterfeit cartridges”

64%

% of decision makers who purchase clone cartridges
% of decision makers who think it’s possible they have purchased counterfeit
% of office workers who trust their company is not purchasing counterfeit cartridges
% of office workers who trust their company is not buying clone/third-party cartridges

Spain  Italy  France  Germany  China  US  Canada  UK  India  Mexico

61%  60%  57%  61%  65%  61%  60%  66%  72%  69%
39%  41%  39%  37%  36%  43%  36%  43%  35%  40%

THIS IS UNINTENTIONALLY CREATING A BREACH OF TRUST WITH OFFICE WORKERS—THE MAJORITY OF WHOM BELIEVE THEIR COMPANIES ARE NOT PURCHASING NON-ORIGINAL CARTRIDGES

“I trust my company is not buying clone / third-party cartridges”

61%

“I trust my company is not buying counterfeit cartridges”

64%

% of decision makers who purchase clone cartridges
% of decision makers who think it’s possible they have purchased counterfeit
% of office workers who trust their company is not purchasing counterfeit cartridges
% of office workers who trust their company is not buying clone/third-party cartridges

Spain  Italy  France  Germany  China  US  Canada  UK  India  Mexico

61%  60%  57%  61%  65%  61%  60%  66%  72%  69%
39%  41%  39%  37%  36%  43%  36%  43%  35%  40%

THIS IS UNINTENTIONALLY CREATING A BREACH OF TRUST WITH OFFICE WORKERS—THE MAJORITY OF WHOM BELIEVE THEIR COMPANIES ARE NOT PURCHASING NON-ORIGINAL CARTRIDGES

“I trust my company is not buying clone / third-party cartridges”

61%

“I trust my company is not buying counterfeit cartridges”

64%

% of decision makers who purchase clone cartridges
% of decision makers who think it’s possible they have purchased counterfeit
% of office workers who trust their company is not purchasing counterfeit cartridges
% of office workers who trust their company is not buying clone/third-party cartridges

Spain  Italy  France  Germany  China  US  Canada  UK  India  Mexico

61%  60%  57%  61%  65%  61%  60%  66%  72%  69%
39%  41%  39%  37%  36%  43%  36%  43%  35%  40%

THIS IS UNINTENTIONALLY CREATING A BREACH OF TRUST WITH OFFICE WORKERS—THE MAJORITY OF WHOM BELIEVE THEIR COMPANIES ARE NOT PURCHASING NON-ORIGINAL CARTRIDGES

“I trust my company is not buying clone / third-party cartridges”

61%

“I trust my company is not buying counterfeit cartridges”

64%

% of decision makers who purchase clone cartridges
% of decision makers who think it’s possible they have purchased counterfeit
% of office workers who trust their company is not purchasing counterfeit cartridges
% of office workers who trust their company is not buying clone/third-party cartridges

Spain  Italy  France  Germany  China  US  Canada  UK  India  Mexico

61%  60%  57%  61%  65%  61%  60%  66%  72%  69%
39%  41%  39%  37%  36%  43%  36%  43%  35%  40%
AS HALF OF OFFICE DECISION MAKERS OPERATE WITH FALSE INFORMATION, MOST ARE NOT AWARE OF THE IMPACT NON-ORIGINAL CARTRIDGES HAVE ON THEIR OFFICES.

HALF of office decision makers globally falsely believe:

- ALL INK CARTRIDGES ARE RECYCLABLE, regardless if they're original or clone/third-party/counterfeit cartridges (53%)

Original manufacturers only want to discourage people from buying clone/third-party/counterfeit cartridges BECAUSE THEY'RE EATING INTO THEIR PROFITS, NOT BECAUSE OF QUALITY / SAFETY ISSUES (50%)

- ALL INK CARTRIDGES HAVE THE SAME IMPACT on the environment (50%)

- CLONE/THIRD-PARTY/COUNTERFEIT CARTRIDGES DO NOT COST MORE IN THE LONG-RUN than original cartridges (48%)

Q34: Please indicate if you think the following statements are true or false. // Base sizes: Global DMs = 5,007
GERMANY, US, AND CANADA HAVE THE MOST UNINFORMED OFFICE DECISION MAKERS—SUGGESTING A REAL NEED FOR KNOWLEDGE SPREADING

% of individuals who falsely believe…

- All ink cartridges have the same impact on the environment
- Original manufacturers only want to discourage people from buying clone/third-party/counterfeit cartridges because they’re eating into their profits, not because of quality / safety issues
- All ink cartridges are recyclable, regardless if they’re Original or clone/third-party/counterfeit cartridges
- Clone/third-party/counterfeit cartridges do not cost more in the long-run than Original cartridges
PERHAPS FUELED BY LACK OF INFORMATION, THERE IS A DISTINCT LACK OF AGENCY ON BEHALF OF OFFICE DECISION MAKERS TO ENSURE THE PURCHASE AND PROPER RECYCLING OF CARTRIDGES—DESPITE THIS FALLING UNDER THEIR JOB DESCRIPTION
Q9: Now thinking more about whose responsibility it is to push us towards more sustainable workplaces, how much do you agree or disagree with the following statements? (top 2 box reported) // Base sizes: Global DMs = 5,007

<table>
<thead>
<tr>
<th>Statement</th>
<th>% of office decision makers who agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is the employer’s responsibility to understand what a pleasant workplace environment looks like and ensure to maintain it</td>
<td>78%</td>
</tr>
<tr>
<td>It is the responsibility of employers to ensure all office supplies contribute to a safe and healthy environment for their employees</td>
<td>76%</td>
</tr>
<tr>
<td>The employer has a responsibility to promote and enforce sustainable business practices</td>
<td>75%</td>
</tr>
<tr>
<td>It is the responsibility of employers to push for tighter regulation on the safety of their employees’ workspaces</td>
<td>72%</td>
</tr>
<tr>
<td>It is the responsibility of office workers to speak up and tell their employer what they want their workplace environment to be like</td>
<td>71%</td>
</tr>
<tr>
<td>The government has a responsibility to promote and enforce sustainable business practices</td>
<td>69%</td>
</tr>
<tr>
<td>I have a responsibility to promote and enforce sustainable business practices</td>
<td>67%</td>
</tr>
</tbody>
</table>
OFFICE DECISION MAKERS IN EMERGING ECONOMIES ARE MORE LIKELY TO SHARE RESPONSIBILITY EQUALLY WITH EMPLOYERS

% of office decision makers who agree with the following statements

- The EMPLOYER has a responsibility to promote and enforce sustainable business practices
- It is the responsibility of OFFICE WORKERS to speak up and tell their employer what they want their workplace environment to be like
- The GOVERNMENT has a responsibility to promote and enforce sustainable business practices
- I HAVE a responsibility to promote and enforce sustainable business practices

The EMPLOYER has a responsibility to promote and enforce sustainable business practices:
- Canada DMs = 500
- China DMs = 505
- France DMs = 500
- Germany DMs = 502
- India DMs = 500
- Italy DMs = 500
- Mexico DMs = 500
- Spain DMs = 500
- UK DMs = 500
- US DMs = 500

Office decision makers in emerging economies are more likely to share responsibility equally with employers.

Equal responsibility put on employer/theirselfs:
- India: 85% (82%)
- Mexico: 82% (77%)
- China: 80% (77%)
- US: 84% (81%)
- UK: 64% (65%)
- Canada: 52% (60%)
- Spain: 72% (70%)
- France: 72% (70%)
- Germany: 71% (68%)
- Italy: 71% (68%)

More responsibility put on employer vs. themselves:
- India: 82% (77%)
- Mexico: 80% (77%)
- China: 79% (77%)
- US: 81% (77%)
- UK: 79% (77%)
- Canada: 77% (74%)
- Spain: 76% (71%)
- France: 78% (74%)
- Germany: 76% (75%)
- Italy: 77% (74%)
THIS ISSUE IS NOT JUST ISOLATED TO OUR OFFICES—for those who own printers at home, ignorance breeds complacency—unaware of the effect, people don’t prioritize environmental impact when purchasing ink cartridges.
INK CARTRIDGE WASTE GOES BEYOND THE OFFICE—WITH LESS THAN 3 IN 10 HOUSEHOLDS TAKING CARE TO RECYCLE THEIR CARTRIDGES CONSISTENTLY

ONLY 3 IN 10 recycle ink cartridges every time (29%)

% of individuals who recycle their ink cartridges every time…

Spain: 45%  France: 41%  Italy: 36%  Canada: 32%  UK: 29%  Germany: 28%  US: 25%  Mexico: 24%  China: 21%  India: 10%
THIS IS NOT CAUSED BY LACK OF KNOWLEDGE, AS THE MAJORITY OF CONSUMERS KNOW CARTRIDGES CAN BE RECYCLED

% of individuals who...

Know ink cartridges are recyclable

61%

Recycle ink cartridges every time

29%

EDELMAN INTELLIGENCE / © 2019

Q12: To the best of your knowledge, which of the following office supplies are recyclable? / Q14: And how often do you recycle the following? // Base sizes: Global Gen Pop = 10001, Canada Gen Pop = 1000, China Gen Pop = 1000, France Gen Pop = 1000, Germany Gen Pop = 1001, India Gen Pop = 1000, Italy Gen Pop = 1000, Mexico Gen Pop = 1000, Spain Gen Pop = 1000, UK Gen Pop = 1000, US Gen Pop = 1000
SO WHAT’S THE PROBLEM? – THEY DON’T SEE INK CARTRIDGE WASTE AS A SERIOUS ISSUE

LESS THAN HALF
globally consider ink and toner cartridge waste to be a serious issue…
(44%, TOP 2 on a 5pt scale)

Besides price, top factors considered when purchasing a cartridge:

- PERFORMANCE: 56%
- BRAND/MANUFACTURER: 53%
- TRUSTED SOURCE: 48%

…and only ONE THIRD even consider environmental impact when buying cartridges
(33%)
**UK, US, AND CANADA ARE LEAST LIKELY TO CONSIDER ENVIRONMENTAL IMPACT WHEN PURCHASING INK CARTRIDGES**

“Besides price, what else do you consider when purchasing ink / toner cartridges?”

<table>
<thead>
<tr>
<th>Performance</th>
<th>Brand / manufacturer</th>
<th>Trusted source</th>
<th>Environmental impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>56%</td>
<td>53%</td>
<td>48%</td>
<td>33%</td>
</tr>
</tbody>
</table>

- China: 69%, 66%, 65%, 63%, 64%, 62%, 60%, 60%, 57%, 55%, 53%, 46%, 45%, 38%, 31%, 26%, 26%, 25%, 25%, 26%
- India: 66%, 66%, 63%, 55%, 53%, 46%, 45%, 38%, 31%, 26%, 26%, 25%, 25%, 26%
- Spain: 69%, 63%, 53%, 46%, 45%, 38%, 31%, 26%, 26%, 25%, 25%, 26%
- Mexico: 69%, 66%, 65%, 63%, 64%, 62%, 60%, 60%, 57%, 55%, 53%, 46%, 45%, 38%, 31%, 26%, 26%, 25%, 25%, 26%
- Italy: 69%, 66%, 65%, 63%, 64%, 62%, 60%, 60%, 57%, 55%, 53%, 46%, 45%, 38%, 31%, 26%, 26%, 25%, 25%, 26%
- Germany: 69%, 66%, 65%, 63%, 64%, 62%, 60%, 60%, 57%, 55%, 53%, 46%, 45%, 38%, 31%, 26%, 26%, 25%, 25%, 26%
- France: 69%, 66%, 65%, 63%, 64%, 62%, 60%, 60%, 57%, 55%, 53%, 46%, 45%, 38%, 31%, 26%, 26%, 25%, 25%, 26%
- UK: 69%, 66%, 65%, 63%, 64%, 62%, 60%, 60%, 57%, 55%, 53%, 46%, 45%, 38%, 31%, 26%, 26%, 25%, 25%, 26%
- US: 69%, 66%, 65%, 63%, 64%, 62%, 60%, 60%, 57%, 55%, 53%, 46%, 45%, 38%, 31%, 26%, 26%, 25%, 25%, 26%
- Canada: 69%, 66%, 65%, 63%, 64%, 62%, 60%, 60%, 57%, 55%, 53%, 46%, 45%, 38%, 31%, 26%, 26%, 25%, 25%, 26%
Perhaps because so few consider ink and toner cartridge waste to be a serious issue

<table>
<thead>
<tr>
<th>Country</th>
<th>Consider Ink and Toner Cartridge Waste to Be a Serious Issue</th>
<th>Consider Environmental Impact when Purchasing Ink Cartridges</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>72%</td>
<td></td>
</tr>
<tr>
<td>India</td>
<td>63%</td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>US</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Canada</td>
<td>32%</td>
<td></td>
</tr>
</tbody>
</table>

Q15: How much do you agree or disagree with the following statements? (top 2 box reported) / Q23: Besides price, what else do you consider when purchasing ink / toner cartridges? // Base sizes: Canada Gen Pop = 1000, China Gen Pop = 1000, France Gen Pop = 1000, Germany Gen Pop = 1001, India Gen Pop = 1000, Italy Gen Pop = 1000, Mexico Gen Pop = 1000, Spain Gen Pop = 1000, UK Gen Pop = 1000, US Gen Pop = 1000
THE PURCHASE OF NON-ORIGINAL CARTRIDGES IS A REAL GLOBAL ISSUE THAT GOES BEYOND OFFICES AND INTO THE GENERAL PUBLIC’S HOMES

45% globally who purchase cartridges think it’s possible they could have purchased a counterfeit cartridge

60% globally who purchase clone/third-party cartridges

Q26: How frequently do you choose to buy clone/third-party cartridges for your home printer? (net of “I purchase a mix of Original and clone/third party cartridges” and “I only purchase clone/third party cartridges”) / Q28: Do you think it’s possible you may have unintentionally purchased a counterfeit cartridge for your home printer in the past? (top 2 box reported) // Base size: Global Gen Pop = 10001
INDIA, SPAIN, AND CHINA ARE PARTICULARLY HIGH OFFENDERS

Those who think it’s possible they could have purchased COUNTERFEIT CARTRIDGES

- India: 74%
- Spain: 67%
- China: 51%
- Italy: 50%
- Mexico: 51%
- Germany: 38%
- France: 39%
- UK: 40%
- US: 44%
- Canada: 35%

Those who purchase CLONE / THIRD-PARTY CARTRIDGES

- India: 78%
- Spain: 69%
- China: 65%
- Italy: 62%
- Mexico: 62%
- Germany: 60%
- France: 55%
- UK: 53%
- US: 52%
- Canada: 50%

Q26: How frequently do you choose to buy clone/third-party cartridges for your home printer? (net of "I purchase a mix of Original and clone/third party cartridges" and "I only purchase clone/third party cartridges")
Q28: Do you think it’s possible you may have unintentionally purchased a counterfeit cartridge for your home printer in the past? (top 2 box reported)

Base sizes: Canada Gen Pop = 1000, China Gen Pop = 1000, France Gen Pop = 1000, Germany Gen Pop = 1001, India Gen Pop = 1000, Italy Gen Pop = 1000, Mexico Gen Pop = 1000, Spain Gen Pop = 1000, US Gen Pop = 1000
UNAWARE AND UNCONVINCED OF THE IMPACT, CONSUMERS WILL KEEP PURCHASING

HALF globally falsely believe:

- All ink cartridges have the same impact on the environment (54%)
  - Original manufacturers only want to discourage people from buying clone / third-party / counterfeit cartridges because they’re eating into their profits, not because of quality / safety issues (52%)

- All ink cartridges are recyclable, regardless if they’re Original or clone/third-party/counterfeit cartridges (51%)

- Clone / third-party / counterfeit cartridges do not cost more in the long-run than Original cartridges (51%)

As a result, many globally don’t plan on avoiding purchasing non-Original cartridges in the future

40% globally DO NOT agree they will avoid purchasing CLONE/THIRD-PARTY CARTRIDGES in the future at all costs (BOTTOM 3 on 5pt scale)

35% globally DO NOT agree they will avoid purchasing COUNTERFEIT CARTRIDGES in the future at all costs (BOTTOM 3 on 5pt scale)
SKEPTICISM & MISINFORMATION IS PREVALENT GLOBALLY. CHINA & MEXICO ARE MOST KNOWLEDGEABLE ABOUT IMPACT OF NON-ORIGINAL CARTRIDGES

% of individuals who falsely believe…

- All ink cartridges have the same impact on the environment
- Original manufacturers only want to discourage people from buying clone/third-party/counterfeit cartridges because they’re eating into their profits, not because of quality / safety issues
- All ink cartridges are recyclable, regardless if they’re Original or clone/third-party/counterfeit cartridges
- Clone/third-party/counterfeit cartridges do not cost more in the long-run than Original cartridges

Q34: Please indicate if you think the following statements are true or false. / Q36: How much do you agree or disagree with the following statements? (bottom 3 box reported) / Q37: How much do you agree or disagree with the following statements? (bottom 3 box reported) / Base sizes: Canada Gen Pop = 1000, China Gen Pop = 1000, France Gen Pop = 1000, Germany Gen Pop = 1001, India Gen Pop = 1000, Italy Gen Pop = 1000, Mexico Gen Pop = 1000, Spain Gen Pop = 1000, UK Gen Pop = 1000, US Gen Pop = 1000
EQUIPPED WITH THIS KNOWLEDGE, CHINA AND MEXICO ARE THE LEAST LIKELY TO PURCHASE NON-ORIGINAL CARTRIDGES IN THE FUTURE

Those who DO NOT agree they will avoid purchasing CLONE/THIRD-PARTY CARTRIDGES in the future at all costs
(BOTTOM 3 on 5pt scale)

Those who DO NOT agree they will avoid purchasing COUNTERFEIT CARTRIDGES in the future at all costs
(BOTTOM 3 on 5pt scale)

Q36: How much do you agree or disagree with the following statements? / Q37: How much do you agree or disagree with the following statements? (bottom 3 box reported) // Base sizes: Canada Gen Pop = 1000, China Gen Pop = 1000, France Gen Pop = 1000, Germany Gen Pop = 1000, India Gen Pop = 1000, Italy Gen Pop = 1000, Mexico Gen Pop = 1000, Spain Gen Pop = 1000, UK Gen Pop = 1000, US Gen Pop = 1000

Q36: How much do you agree or disagree with the following statements? / Q37: And below are several similar statements about Counterfeit cartridges. How much do you agree or disagree with the following statements?
ADDRESSING THE ISSUE: BRANDS ARE BEING CALLED TO TAKE ACTION
CONSUMERS ARE LOOKING TO BRANDS TO BE PROACTIVE IN PROVIDING SAFE PRODUCTS AND REDUCING ENVIRONMENTAL IMPACT

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I believe brands should be <strong>PROACTIVE ON THE SAFETY OF THEIR PRODUCTS</strong> and do more than follow existing governmental regulations</td>
<td>77%</td>
</tr>
<tr>
<td>It is the responsibility of brands to <strong>PUSH FOR TIGHTER REGULATION ON THE SAFETY OF THEIR PRODUCTS</strong></td>
<td>74%</td>
</tr>
<tr>
<td>I believe brands should be <strong>PROACTIVE IN THE ENVIRONMENTAL IMPACT OF THEIR PRODUCTS</strong> and do more than follow existing governmental regulations</td>
<td>75%</td>
</tr>
<tr>
<td>It is the responsibility of brands to <strong>PUSH FOR TIGHTER REGULATION ON THE ENVIRONMENTAL IMPACT OF THEIR PRODUCTS</strong></td>
<td>72%</td>
</tr>
</tbody>
</table>
C2: Thinking about the role brands/companies have in making the world a better place and addressing societal issues, please indicate how much you agree or disagree with the following statements (top 2 box reported) // Base sizes: Canada Gen Pop = 1000, China Gen Pop = 1000, France Gen Pop = 1000, Germany Gen Pop = 1001, India Gen Pop = 1000, Italy Gen Pop = 1000, Mexico Gen Pop = 1000, Spain Gen Pop = 1000, UK Gen Pop = 1000, US Gen Pop = 1000

This sentiment is strong across all countries.

% of individuals who agree...

- I believe brands should be proactive on the safety of their products and do more than follow existing governmental regulations
- It is the responsibility of brands to push for tighter regulation on the safety of their products
- I believe brands should be proactive in the environmental impact of their products and do more than follow existing governmental regulations
- It is the responsibility of brands to push for tighter regulation on the environmental impact of their products
THIS INCLUDES INK MANUFACTURERS – CONSUMERS ARE LOOKING TO HP TO INFORM THEM ABOUT RISKS OF NON-ORIGINAL CARTRIDGES

“Original manufacturers should do more to warn about…”

68% Counterfeit cartridges

64% Clone cartridges
Q36: How much do you agree or disagree with the following statements? (top 2 box reported) / Q37: And below are several similar statements about Counterfeit cartridges. How much do you agree or disagree with the following statements? (top 2 box reported)

- Original manufacturers should do more to warn buyers about CLONE/THIRD-PARTY cartridges
- Original manufacturers should do more to warn buyers about COUNTERFEIT cartridges

**Base sizes:**
- Canada Gen Pop = 1000
- China Gen Pop = 1000
- India Gen Pop = 1000
- France Gen Pop = 1000
- Germany Gen Pop = 1001
- Italy Gen Pop = 1000
- Mexico Gen Pop = 1000
- Spain Gen Pop = 1000
- US Gen Pop = 1000
- UK Gen Pop = 1000
- US Gen Pop = 1000

**Percentage Agreement:**
- Mexico: 80%
- China: 80%
- India: 77%
- Spain: 73%
- US: 68%
- UK: 66%
- Italy: 65%
- Canada: 65%
- France: 64%
- Germany: 63%

**Percentage Disagreement:**
- Mexico: 20%
- China: 20%
- India: 23%
- Spain: 27%
- US: 32%
- UK: 34%
- Italy: 35%
- Canada: 35%
- France: 36%
- Germany: 37%
64% of consumers globally say they’re willing to pay more for products from companies that demonstrate their commitment to reducing their environmental impact.
PROFILING DECISION MAKERS
In every country, HP is still the most considered brand when purchasing ink cartridges.

### Decision makers’ supplies brand consideration—Global breakdown

<table>
<thead>
<tr>
<th>Country</th>
<th>HP</th>
<th>Canon</th>
<th>Epson</th>
<th>Kodak</th>
<th>Non-original (store-brand)</th>
<th>Non-original (other)</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>69%</td>
<td>50%</td>
<td>50%</td>
<td>7%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>China</td>
<td>68%</td>
<td>59%</td>
<td>50%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Mexico</td>
<td>62%</td>
<td>50%</td>
<td>50%</td>
<td>12%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>US</td>
<td>58%</td>
<td>57%</td>
<td>26%</td>
<td>7%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Canada</td>
<td>57%</td>
<td>57%</td>
<td>23%</td>
<td>11%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Germany</td>
<td>56%</td>
<td>55%</td>
<td>18%</td>
<td>11%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Spain</td>
<td>55%</td>
<td>55%</td>
<td>26%</td>
<td>11%</td>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>UK</td>
<td>56%</td>
<td>56%</td>
<td>31%</td>
<td>12%</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>France</td>
<td>57%</td>
<td>57%</td>
<td>31%</td>
<td>10%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Italy</td>
<td>55%</td>
<td>55%</td>
<td>44%</td>
<td>11%</td>
<td>11%</td>
<td>9%</td>
</tr>
</tbody>
</table>

Above global total: 64%  Below global total: 36%
ALMOST AS MANY OFFICE DECISION MAKERS BUY THEIR PRINTER SUPPLIES ON CONTRACT AS THEY DO ON AN AD-HOC BASIS...

39% of decision makers buy *all* of their printer supplies on *contract*

23% have a *contract* but *also* buy supplies on an *ad-hoc basis*

36% *do not* have a contract and *only* buy on an *ad-hoc basis*
...BUT THIS DIFFERS GREATLY BETWEEN COUNTRIES, WITH SOME BUYING MOSTLY AD-HOC AND OTHERS BUYING MOSTLY ON CONTRACT

- We buy all our supplies on contract
- We don't have a contract and only buy on an ad-hoc basis

Supplies on contract:
- India: 52%, 15%
- China: 53%, 18%
- Spain: 46%, 35%
- France: 42%, 31%
- Mexico: 43%, 37%
- Italy: 36%, 34%
- Canada: 34%, 41%
- UK: 32%, 41%
- US: 46%, 20%
- Germany: 62%

Supplies on ad-hoc basis:
- India: 52%, 15%
- China: 53%, 18%
- Spain: 46%, 35%
- France: 42%, 31%
- Mexico: 43%, 37%
- Italy: 36%, 34%
- Canada: 34%, 41%
- UK: 32%, 41%
- US: 46%, 20%
- Germany: 62%

Q20: Thinking about your office printers, how does your company purchase printer supplies? // Base sizes: Global DMs = 5,007, Canada DMs = 505, China DMs = 505, France DMs = 500, Germany DMs = 502, India DMs = 500, Italy DMs = 500, Mexico DMs = 500, Spain DMs = 500, UK DMs = 500, US DMs = 500
DECISION MAKERS ARE NOT JUST BUYING THE CHEAPEST OPTION AVAILABLE

“When you buy ink / toner cartridges, how often do you buy the cheapest available?”

ONLY 29% buy the cheapest cartridges available more than half of the time
ACROSS THE WORLD THEY ARE BUYING THE CHEAPEST AVAILABLE LESS THAN HALF OF THE TIME

When you buy ink / toner cartridges, how often do you buy the cheapest available?

More than half of the time | Less than half of the time
---|---
Canada: 67% | 33%
France: 68% | 32%
UK: 69% | 31%
India: 70% | 30%
Germany: 72% | 28%
Spain: 72% | 28%
US: 75% | 25%
Italy: 77% | 23%
Mexico: 78% | 22%
China: 78% | 22%
ALONG WITH EDUCATING ON IMPACT, THERE IS ALSO A NEED TO EDUCATE CONSUMERS ON TERMINOLOGY FOR NON-ORIGINAL CARTRIDGES

NEARLY HALF globally are not aware of counterfeit cartridges

OVER HALF globally are not aware of clone cartridges
WESTERN MARKETS ARE LEAST AWARE OF TERMINOLOGY – CHINA, THE BIGGEST PRODUCER OF COUNTERFEIT GOODS, IS MOST AWARE

% of individuals who have never heard of them

Those unaware of COUNTERFEIT CARTRIDGES

- China: 59%
- India: 68%
- Mexico: 63%
- Italy: 52%
- Spain: 54%
- US: 41%
- UK: 45%
- Germany: 40%
- France: 23%
- Canada: 18%

Those unaware of CLONE CARTRIDGES

- France: 74%
- Canada: 71%
- US: 70%
- Germany: 69%
- UK: 67%
- Spain: 56%
- Italy: 56%
- Mexico: 51%
- India: 32%
- China: 27%
RESPONDENTS WERE SHOWN A DEFINITION OF EACH TYPE OF CARTRIDGE

**Original cartridges**
*Brand-name cartridges manufactured by the same brands that manufacture printers (e.g., HP, Canon, Xerox, etc.).*

**Clone or third-party cartridges**
*Cartridges are newly built cartridges that are manufactured by third parties to be compatible with Original printers, but use non-Original/name-brand parts. These cartridges are low-cost alternatives to Original cartridges.*

**Counterfeit cartridges**
*Newly built, refilled, or remanufactured cartridges manufactured by third parties and packed in unauthorized or fake reproductions of Original packaging, designed to pose as Original cartridges.*
THANK YOU

HELLO@EDELMANINTELLIGENCE.COM
250 HUDSON STREET, 9TH FLOOR
NEW YORK, NY 10013

WWW.EDELMANINTELLIGENCE.COM