

News Release

Opticom International Research



Most valuable woodfree coated sheet brands in Europe

Stockholm, Sweden, December 16, 2011 - Opticom International Research today announces the results from "The Brand Tracking Survey for Woodfree Coated Sheets 2011" whereby **the most valuable woodfree coated sheet brands in Europe are defined and ranked.**

Merchants own the most valuable brands in Europe

Hello from PaperlinX has again proved to be the strongest brand in Europe and with respect to awareness the brand is definitively in a league of its own. The number two and three brands in Europe are both owned by Antalis; Claro climbing into a 2nd place and Novatech being number three in Europe based on a balanced and stable brand equity for years. Claro's strength clearly is satisfaction with the brand; ranked number one when it comes to that dimension of brand equity.

Overall positive and a particularly noticeable progress for certain brands

Most brands show improved Brand Equity Index scores vs. 2009 but there are two brands which stand out with a particularly strong development: Lumi by Stora Enso and MultiArt by Papyrus. For Lumi, satisfaction has improved whereas awareness is the main driver behind MultiArt's improved brand equity.

The top ten most valuable woodfree coated sheet brands in Europe, based on the Brand Equity Index (awareness and satisfaction), are:

Ranking 2011 (2009*)	Brand	Owner of the brand
1 (1)	Hello	PaperlinX
2 (7)	Claro	Antalis
3 (3)	Novatech	Antalis
4 (-)	Lumi	Stora Enso
5 (11)	MultiArt	Papyrus
6 (9)	Creator	Lecta group / Torraspapel
7 (15)	Maxi	Igepa
8 (2)	Magno	Sappi
9 (10)	Condat	Lecta group / Condat
10 (6)	Satimat	Arjowiggins

**Shows ranking in 2009 when the Brand Equity Index calculation was slightly different to 2011.*

Pan-European vs. regional or local and mill brands vs. merchant own labels

Most brands are, from a brand equity perspective, local or regional; known by a relatively large share of printers in 2-5 of the 12 markets covered. Only Hello can be considered to be truly pan-European.

Half of the brands qualifying for the total European ranking (as per above) are owned by paper producers and half by merchants. A mill brand takes the lead in six of the twelve markets that the survey covers. In the south of Europe plus Belgium, Lecta brands are at the top; Creator, Condat and Garda whereas Lumi is the number one brand in the UK and Magno by Sappi the leading brand in Switzerland.

Merchant own labels are particularly strong in Germany (Profi by Igepa is the number one brand) and Poland (Claro at the top) as well as the Netherlands, the Czech Republic, Hungary and Austria (Hello is the number one brand in all four countries).

News Release

Opticom International Research



About the Brand Equity Tracking Survey for Woodfree Coated Sheets 2011

Since 2009, the survey is conducted bi-annually and has the purpose to identify and rank the most valuable woodfree coated sheet brands in Europe according to sheet-fed offset printers.

The results presented in this news release, are based on 1 488 telephone interviews conducted with sheet-fed offset printers during May and June of 2011. The survey has a very extensive coverage with input from 12 different European countries: Austria, Belgium, the Czech Republic, France, Germany, Hungary, Italy, the Netherlands, Poland, Spain, Switzerland and the UK.

In addition, the survey for the first time covered Scandinavia. Results are however, not incorporated into the total European results but rather presented separately to allow for a comparison over time of the European results.

20% of the total sample are large printers (50 and more employees), 40% medium-sized (10-49 employees) and 40% are small printers (1-9 employees).

The ranking of brands is based on their Brand Equity which takes into account both spontaneous awareness of and satisfaction with the brand. Satisfaction encompasses quality and service associations, perceived brand performance and loyalty towards the brand.

Besides brand awareness, performance and loyalty, the survey also measures buying behaviour; what brands are bought and why and what is the degree of end user influence with respect to brand choice. Furthermore, an important section covers sustainability and environmental aspects. A separate news release will be issued focusing on the latter.

For more information please contact Jessica Tommila at:

Opticom International Research, Grev Turegatan 30, SE-114 38 Stockholm, SWEDEN

Direct phone: +46 (0)8 50 30 90 06

Mobile phone: +46 (0)708 39 90 06

E-mail: jessica@opticom.se

Opticom International Research is a leading global market research and consulting firm *with the mission to help our customers make better business decisions*. Since 1987, we have been dedicated to serving clients within the pulp, paper & board industry with customised research services focusing on commercial and marketing related issues. In combining our large global in-house research capabilities, state-of-the-art information technology and our industry expertise we have proven to be a unique partner for a number of leading forest products companies all over the world that value not only speed and quality but also cost effectiveness in surveys and analyses.