

News Release

Opticom International Research



PaperlinX ranked the #1 woodfree coated supplier 2008

Stockholm, Sweden, October 1st, 2008 - Opticom International Research today announced the results from the study evaluating **"The Top Suppliers of Woodfree Coated Sheets" in Western Europe**.

The results are based on a comprehensive study with 1225 sheetfed printers in seven countries in Western Europe; Belgium, France, Germany, Italy, the Netherlands, the UK and Spain. The study is ranking the top suppliers based on how well they perform and fulfil the demands when it comes to service as well as other criteria that are crucial to sheetfed printers. The loyalty towards the suppliers has also been measured.

Similar to findings from the supplier part for Central & Eastern Europe, the woodfree coated sheet market is also in Western Europe mainly a merchant market. It is however a more well established market where paper producers have a stronger presence than in Central & Eastern Europe. Paper merchants included in this study are **Antalis, Berberich, Burgo Distribuzione, Elliot Baxter, Igepa, Inapa, Malmenayde, PaperlinX, Papyrus, Sarriópapel and Torraspapel Distribucion**. Paper producers included are **Arctic Paper, ArjoWiggins, Burgo, Fedrigoni, Grycksbo, Lecta, M-real, Sappi, Scheufelen, Stora Enso and UPM**.

The supplier index ranking according to **sheetfed printers in Western Europe** looks as follows (*last year's ranking within brackets*):

Top Suppliers in Western Europe according to sheetfed offset printers

<i>Rank</i>	<i>Supplier</i>
1.	<i>PaperlinX (4)</i>
2.	<i>Papyrus (2)</i>
3.	<i>Igepa (1)</i>
4.	<i>Burgo Distribuzione (new)</i>
5.	<i>Inapa (3)</i>
6.	<i>Antalis (5)</i>

**) In order to qualify for the Supplier Index, a supplier has to be evaluated by at least 10 respondents in 2 different countries*

Key findings:

- PaperlinX has improved its position both in terms of Relative Performance as well as Loyalty since last year and is now regarded the #1 supplier.
- PaperlinX and Antalis are still most frequently the main supplier of woodfree coated sheets.
- Range of paper qualities, products and brands are regarded as slightly more important this year compared to last year. Still, logistics/supply chain offering is the most important criterion though.
- Just as in 2007, Lecta is the only paper producer that is qualifying for the Supplier Index, thanks to strong presence in the south of Europe. Lecta's relative performance has deteriorated since last year though, whereas the loyalty towards them has increased

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- Value for money appears even more important when it comes to the actual supplier than when evaluating a certain brand. This suggests that more value is still associated with the actual supplier instead of the value being tied to the brand.
- In general, sheetfed printers seem more loyal to their suppliers this year than they did in 2007.

For more information, or ordering of the study, please contact Emma Grundström at:

Opticom International Research
Grev Turegatan 30, SE-114 38 Stockholm, SWEDEN
Direct phone: +46 (0)8 50 30 90 19
Mobile phone: +46 (0)708 39 90 19
Fax +46 (0)8 50 30 90 01
E-mail: emma@opticom.se

Subscription fee

Top suppliers of Woodfree Coated Sheets in WE 2008	Euro
Full Top Supplier Survey <i>(Word document with summary & analysis, individual powerpoint slides per country and statistics)</i>	7 000
Summary & Analysis Top Suppliers <i>(Word document)</i>	4 000

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About "The Top Suppliers of Woodfree Coated Sheets" in Western Europe

The study ranks the best suppliers of woodfree coated paper in Western Europe according to a Supplier Index composed of two main drivers; relative performance and loyalty. The Relative Performance Index measures the importance of a number of service related criteria as well as the suppliers' performance with respect to the same criteria. The service and supplier related criteria evaluated are:

- > High quality products
- > Logistics /supply chain offering
- > Technical advice and support
- > Range of paper qualities, products and brands
- > Relationship and personal contacts
- > Innovation and development capacity
- > Environmentally friendly
- > Total value for money (including both products and services)

The Loyalty Index measures the likelihood of the supplier being selected again if printers were to select a supplier of woodfree coated sheets today.

A supplier must be evaluated by a total of ten sheetfed printers in a minimum of two different countries in order to qualify for the total supplier index.

The fieldwork was conducted in April-May 2008. A total of 1225 quantitative CATI-telephone interviews were carried out in seven countries in Western Europe; Belgium, France, Germany, Italy, Spain, the Netherlands and the UK.

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 pulp & paper competence 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.