

News Release

Opticom International Research



Claro takes the lead as the most valuable woodfree coated paper brand in Central & Eastern Europe

Stockholm, Sweden, September 15, 2008 - Opticom International Research today presents the results from the second independently conducted brand study "The Brand Equity Tracking Survey – Woodfree coated paper" in **Central & Eastern Europe**.

The study is ranking brands of woodfree coated sheets based on how known they are in the market, how well they meet customers' expectations on a number of quality performance criteria as well as the loyalty towards them. The study also identifies buying behaviour and purchasing power trends. The results are based on interviews with close to 500 sheetfed printers in Central & Eastern Europe. Four countries are covered in this edition of the Brand Tracking survey; Austria, the Czech Republic, Hungary and Poland.

In total 36 different woodfree coated sheet brands have been tracked:

2U	EuroArt	Luxo	Presto
Allegro	Galerie Art	Magno	Profi
Arctic	Garda	Maxigloss,-satin,-silk	R4/R4 Chorus
Bianca	G-Print	MediaPrint	SilverStar
Black Label	HannoArt	Mega	Symbol
BVS	Heaven 42	MultiArt	Tempo
Claro	Hello	Novatech	Toccata
Condat Matt Périgord	Ikono	Polaris	Tom & Otto
Creator	LumiArt,-Silk	Prelude	UPM Finesse

Of the 36 brands tracked, eight of them qualified for Opticom's Brand Equity Index (BEI). This Index consists of four different key drivers of brand equity: spontaneous brand awareness, top-of-mind awareness, brand performance and loyalty. The eight most valuable woodfree coated paper brands in Central & Eastern Europe according to Opticom's Brand Equity Index (BEI) are:

Rank 2008 (rank 2007)	Brand	Qualifying in the following countries:	Brand owner
1 (2)	Claro	AT, HU, CZ, PL	Antalis
2 (1)	Hello	AT, HU, CZ	PaperlinX
3 (3)	Garda	HU, CZ	Cartiere Garda/Lecta
4 (5)	UPM Finesse	AT, HU	UPM
5 (4)	Novatech	CZ, PL	Antalis
6 (new)	Profi	CZ, PL	Igepa
7 (7)	Luxo	AT, CZ	Papyrus
8 (8)	Black Label	CZ, PL	Antalis

**) In order to qualify for the Brand Equity Index, a brand has to be evaluated by at least 10 respondents in 2 different countries.*

The survey gives in-depth insight into the particular characteristics of each brand, showing its strengths and weaknesses and allowing for benchmarking of brands. It further shows what sheetfed printers consider important when deciding which woodfree coated sheet brand to buy as well as what can make them switch from the currently used brand to instead buy another brand. The study also shows market characteristics of the countries included (Austria, Czech Republic, Hungary and Poland).

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Key findings:

- The majority of brands in the top list are merchant owned brands, only UPM Finesse and Garda are mill owned brands. Antalis is the only brand owner with more than one brand in the total ranking: Claro, Novatech and Black Label.
- Claro is the only brand that has improved its total index score since last year whereas all other brands qualifying show deteriorated scores. Claro therefore moves up to the top position this year, pushing Hello down to #2.
- The top two brands (Claro and Hello) are well ahead of competition, showing a rather big gap to the brands ranked as #3 and lower. The reason for this dominance is the strong awareness of both Claro and Hello.
- Profi (strong in Poland and the Czech Republic) qualifies for the first time this year whereas Mega (strong in Hungary) has disappeared from the ranking list due to limited geographical coverage.
- UPM Finesse is among the top brands in C&EE. UPM Finesse has passed Novatech in this year's survey in spite of lower total index score. The move up the ranking list has been possible due to Novatech showing a relatively larger drop regarding the total index score than UPM Finesse though.
- There are more locally strong brands in C&EE than in Western Europe. In Western Europe, very often the same brands appear strong in most countries, only with a different ranking order in each country, indicating regionally strong or European brands.
- C&EE is a merchant market and paper producers do not have a strong position here. C&EE can still be considered a new market and it is necessary to have local knowledge about culture and language to make business in the C&EE countries.
- Although overall product quality still is the most important factor when deciding which woodfree coated brand to buy, various supplier related criteria (e.g. supplier/brand logistics offering, business relationship with the supplier, supplier/brand technical advice & support, supplier recommendations) are gaining importance among sheetfed printers in C&EE.
- Delivery problems is the most likely reason that can make a sheetfed printer in C&EE switch to another brand.
- Environmental certifications are not as important in C&EE as it is in Western Europe.

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

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Subscription fees

	1. Full survey C&EE	2. Executive summary & analysis	3. Austria	4. Czech Republic	5. Hungary	6. Poland
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WFC 2008 C&EE Fees (Euro)	15 000	10 000	5 000	5 000	5 000	5 000

The full survey includes the result based on findings from sheetfed printers in all four markets (Austria, the Czech Republic, Hungary and Poland) with the following deliverables:

Deliverables included in the fee for the survey for Central & Eastern Europe are 1 verbal presentation of the findings and 1 CD-ROM with the following:

- > A set of 5 PowerPoint reports on different levels that present 2008 year's results, including comparisons with main findings from previous years when applicable
 - o **1 total report** where the result from each question is shown as a total and when applicable also per main brand evaluated. This report includes an introduction to the survey and the methodology used.
 - o **1 report per country**; totally 4 reports, where the result from each question is presented on a total country level and when applicable also per main brand evaluated
- > **1 Executive summary and analysis document** (PDF-format)
- > **Statistics files** in Excel-format according to the structure of the reports
- > **Customised presentation** of the results per subscriber (shown at verbal presentation); including results of the subscriber's individual brands and its performance as a supplier (when applicable, PowerPoint-format)

About "Brand Equity Tracking Survey – Woodfree Coated Papers 2008"

The survey has an overall purpose to annually identify and track: Brand awareness, brand performance, buying behaviour, brand loyalty and brand equity of woodfree coated papers among printers in Europe.

The brand performance measures the importance of a number of quality related criteria as well as the brand's performance with respect to the same criteria. The quality related criteria evaluated are:

- > Consistent quality
- > High runnability
- > Good printability
- > Fast ink setting & drying
- > Good end print result
- > High opacity
- > High whiteness
- > High bulk
- > Value for money
- > Wide range of paper qualities
- > Environmentally friendly

A brand must be evaluated by at least ten respondents in two countries in order to qualify for the total Brand Equity Index.

The survey was conducted in April-May 2008 and is based on close to 500 quantitative CATI-telephone interviews in four countries; Austria, the Czech Republic, Hungary and Poland. The target

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group is sheet-fed offset printers, which are divided into three different sizes; small, medium and large.

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.

Opticom offers experience and in-depth knowledge across a wide range of commercial and market related issues relevant to our customers:

- Branding
- Customer and market segmentation
- Customer satisfaction
- Concept testing
- Campaign evaluation
- Pricing and positioning
- Channel/distribution strategy

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