

News Release

Opticom International Research



Office paper suppliers challenged in a volatile market

Stockholm, Sweden, December 17, 2009 - Opticom International Research (Opticom) today announces the results from the third independent pan-European study evaluating "The Top Suppliers of Office Paper" in Europe.

The study ranks suppliers of office paper based on how well they fulfil the demands on a number of supplier- and service-related criteria as well as the loyalty towards the suppliers. The results are based on more than 4 000 interviews with professional end-users of office paper across seven countries in Europe.

In comparison to 2007 three merchant groups have moved ahead in Opticom's Supplier Index ranking placing two merchants among the top 5 which previously only included the Inapa Group. With all merchants now being listed in the top ten, this top list is no longer as clearly dominated by resellers. On the other hand, OEMs generally are found outside of the top ten. A similar pattern is still observed when comparing results for relative performance on a number of supplier- and service-related criteria. When it comes to loyalty, suppliers of office paper are listed in a slightly different order than on the total ranking, however.

The supplier index ranking list according to professional end-users (offices) looks as follows (number within brackets indicates 2007 year's position):

Rank	Company (group)	Type
1 (NEW!)	Fiducial	Reseller
2 (5)	Inapa (Group)	Merchant
3 (2)	Lyreco (Lyreco)	Reseller
4 (1)	Viking Direct (Office Depot)	Reseller
5 (12)	Antalis (Group)	Merchant
6 (4)	Office Depot (Office Depot)	Reseller
7 (13)	PaperlinX	Merchant
8 (14)	JM Bruneau (3 Suisses International)	Reseller
9 (8)	Igepa (Group)	Merchant
10 (7)	Papyrus (Group)	Merchant
11 (11)	Océ	OEM
12 (17)	Xerox	OEM
13 (6*)	Ricoh	OEM
14 (10)	Staples (Staples)	Reseller

Because of its strong performance in France, newcomer to the ranking Fiducial manages to take a top position the first year it qualifies for the total ranking. Inapa Group's improved performance can be attributed to a slightly improved ranking on relative performance. Other suppliers of office paper with an improved position in the ranking are Antalis, PaperlinX, JM Bruneau, and Xerox. Considering the suppliers with a lower ranking in comparison to 2007, the driving factor lies in weaker loyalty rather than lower ratings of relative performance.

"The fact that loyalty appears to be the driving factor underlying most of the changes in this year's ranking suggests that office paper buyers are becoming less tied to their suppliers," says Marijn van der Sluijs, Project Manager at Opticom, *"this means that suppliers will need to become better at providing a unique offer and branding, in turn, is likely to play an increasingly important role in order to strengthen customer relations".*

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About "The Top Suppliers of Office Paper" in Europe

The study ranks the best suppliers of office paper in 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 supplier- and service-related criteria as well as the suppliers' performance with respect to the same criteria. The supplier- and service-related criteria evaluated are:

- > Contractual and financial conditions
- > Convenient ordering
- > Environmental responsibility
- > Good supply conditions/deliveries
- > Relationship and personal contacts
- > Total value for money
- > Wide product assortment

The Loyalty Index measures the likelihood of the supplier being selected again if respondents were currently in the process of reviewing their supplier.

A supplier must be evaluated by at least ten respondents in minimum two countries in order to qualify for the total supplier index. In order to qualify for the overall ranking merchants belonging to the merchant groups Igepa, Inapa, and Papyrus have been grouped together, but results for the individual companies belonging to these groups are presented in the country reports where applicable.

The fieldwork was conducted from mid-September to mid-November 2009. In total more than 4 000 quantitative telephone interviews were carried out in seven basic countries; Germany, the United Kingdom, France, Italy, Spain, the Netherlands, and Belgium.

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

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.