News Release

Opticom International Research

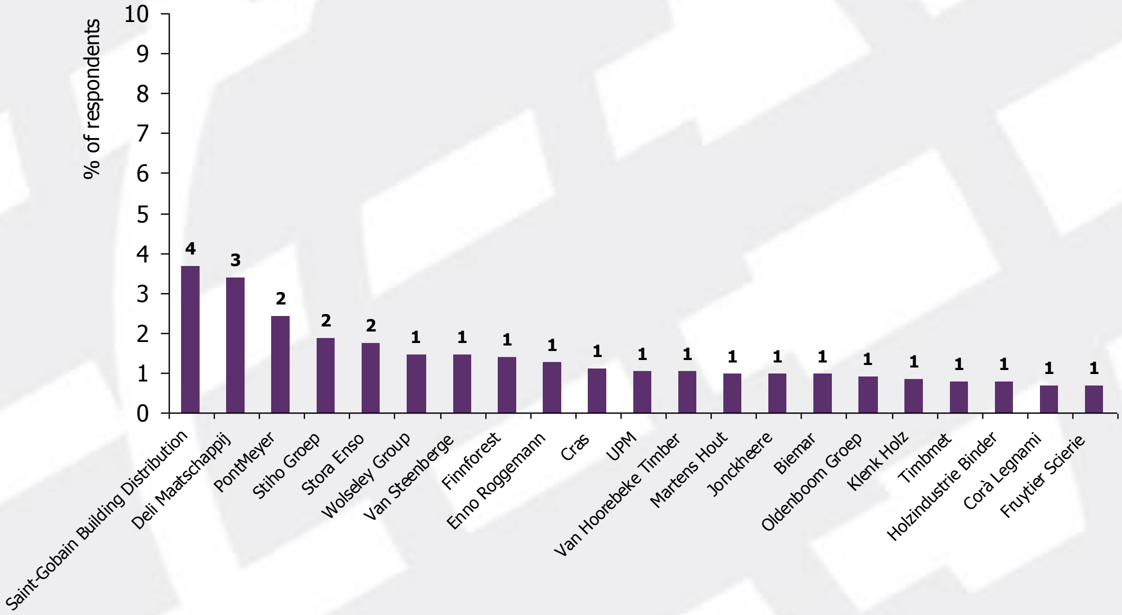
Wood products market fragmented – locally strong suppliers and distributors, but few with pan-European presence

Stockholm, Sweden, September 10, 2008 - The leading suppliers and distributors of wood products are today announced by Opticom International Research on the basis of its "The Future of Wood Products – Market, Brands and Top Suppliers 2008" study.

These results are based on a comprehensive interview programme with 1 500 professional wood products buyers and distributors in Western Europe among key customer groups to the saw mill industry: Building & construction, Joinery & formwork, Furniture, Parquet, Packaging & pallets, Distributors & importers and DIY chains.

As can be noticed in the listing of the main suppliers of wood products presented in the graph below, very few of the suppliers of wood products take a considerable market share. The supplier most frequently mentioned as main supplier of wood products is Saint-Gobain Building Distribution which has been mentioned by 4% of the professional wood products purchasers covered in the survey.

Could you please tell me the name of your current main supplier of wood products?



Furthermore, Saint-Gobain Building Distribution is one of the few suppliers that actually have a somewhat stronger Europe-wide presence. Except for Saint-Gobain Building Distribution, Stora Enso, Finnforest and UPM have also been mentioned as main suppliers on several markets, while Wolseley Group is among the top suppliers in two markets: France and the United Kingdom.

Otherwise many of the top suppliers only appear as top suppliers in one specific market: Enno Roggemann and Klenk Holz in Germany; Timbmet in the United Kingdom; Holzindustrie Binder and Corà Legnami in Italy; Deli Maatschappij, PontMeyer, Stiho Groep, and Oldenboom Groep in the Netherlands; Van Steenberge, Cras, Van Hoorebeke Timber, Martens Hout, Jonckheere, Biemar, and Fruytier Scierie in Belgium. These results suggest a higher concentration of suppliers of wood products in the Dutch and Belgian markets than in any of the other markets covered in the survey.

About "The Future of Wood Products – Market, Brands and Top Suppliers 2008"

The survey has the overall purpose to regularly identify and track: Corporate and brand awareness, brand performance, buying behaviour, brand loyalty, as well as brand equity of major wood product brands and suppliers among important end-users in Europe.

The survey answers …

- what purchasers of wood products **expect of the market** in the **future**?
- **which demands** purchasers of wood products put on their **suppliers**?
- **what matters** to professional purchasers of softwood products and how they **decide** which wood product brand to buy?
- how leading companies and brands are performing when it comes to **brand awareness** and relative **market position** in comparison to other suppliers and brands?
- the **strengths** and **weaknesses** in the brand equity of leading brands?
- **who** sawmills/distributors are selling their wood product brands to and whether this really is the **segment** and the type of purchasers/users they intend to reach?

If any of the above is a grey area to you, this survey will give you a clear picture of where you stand today.

The Opticom brand and supplier tracking survey "The Future of Wood Products – Market, Brands and Top Suppliers 2008" was conducted from February to mid-March 2008. The total project comprises nearly 1 500 interviews in seven European countries: Germany, the United Kingdom, France, Italy, Spain, The Netherlands and Belgium. In total 1 478 interviews, spread over eight target groups in three main segments, were conducted with the person responsible for the selection and/or purchasing of wood products.

Subscription fee

	1. Full survey ☐	**2. Executive summary & analysis** ☐	**3. Building** ☐	**4. Processing** ☐	**5. Selling** ☐
2008 Fees (euro)	27 000	10 000	8 000	8 000	6 000

The full survey includes all target groups (Building & Construction, Joinery & formwork, Furniture, Parquet, Packaging & pallets, Distributors/importers and DIY chains) in all seven markets with the following deliverables:

1 verbal presentation of the findings and 1 CD-ROM with the following:

> A number of reports in PowerPoint-format on different levels that present 2008 year's results,
  - **1 total report per target group** (1 PowerPoint presentation for each of the target groups Building, Processing and Selling consisting of 50-70 slides each) where the result from each question is shown as a total and when applicable also per main company/brand evaluated.

> **An executive summary and analysis document** with conclusions per target group (PDF-format of about 60 pages)

> **Statistics files** in Excel-format according to the structure of the reports

> **Customised presentation document** of the results (shown at verbal presentation); including results of the subscriber's individual brands and its performance as a supplier (when applicable)

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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 forest industry competence we have proved 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.

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.*