

News Release

Opticom International Research



Igepa is the top woodfree coated sheet supplier in Central & Eastern Europe according to a study released by Opticom

Stockholm, Sweden, September 19, 2008 – The ranking list and results from the 2008 survey “**Top Suppliers of Woodfree Coated Sheets**” in **Central & Eastern Europe** was today released by Opticom International Research.

Sheetfed printers in C&EE are ranking the top suppliers based on how well they fulfil their demands when it comes to different supplier- and service- related criteria. The ranking is also a result of how loyal customers are towards the different suppliers. The supplier survey is, just like the actual brand study, based on close to 500 interviews with sheetfed printers in Austria, the Czech Republic, Hungary and Poland.

Due to the nature of sheetfed business (99% of all respondents have a paper merchant rather than a paper producer as their main supplier of woodfree coated sheets), the supplier part of this survey includes evaluation of paper merchants such as; Alfapapir, Antalis, Berberich, Cezex, Europapier, Gumiprint, Igepa, Inapa, PaperlinX and Papyrus, but also paper producers such as Burgo, M-real and UPM.

The Supplier Index ranking according to **sheetfed printers in C&EE** looks as follows (*last year's ranking within brackets*):

Top Suppliers in C&EE according to sheetfed offset printers

<i>Rank</i>	<i>Supplier</i>
1.	Igepa (<i>new</i>)
2.	Papyrus (<i>4</i>)
3.	Europapier (<i>1</i>)
4.	Antalis (<i>5</i>)
5.	PaperlinX (<i>2</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:

- From not having qualified in last year's supplier index, Igepa does qualify this year and moves right into the #1 spot in the supplier ranking with the highest relative performance scores of all suppliers qualifying.
- Papyrus has climbed the ranking list since last year thanks to increased customer loyalty and this is the merchant with the highest Loyalty Index score.
- Europapier, last year's #1, has dropped to #3 this year due to a lower Relative Performance index score. Thanks to higher Loyalty Index than in 2007 though, Europapier still managed to end up as #3.
- PaperlinX has a similar total Index score as in 2007, but due to the very good result from Igepa and improved index scores by the other merchants (particularly Papyrus), PaperlinX has been pushed down from being #2 to now being #5.
- Paper producers are neither strong nor well known in C&EE. This is even more of a merchant market than in Western Europe, most probably because this still can be considered a new market whereas Western Europe is a more established and mature market.

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- Paper merchants often operate through local merchants that are part of the group and the brands distributed are often locally strong.
- Antalis and PaperlinX are the most frequently mentioned main suppliers in C&EE, followed by Europapier.
- Logistics/supply chain offerings are more important to sheetfed printers in C&EE than in Western Europe
- In general, sheetfed printers seem more satisfied with their suppliers than those in Western Europe.

This study has thoroughly investigated the performance of suppliers of woodfree coated sheets and the result allows for comparisons between the suppliers, both on a total level but also per market. If you are a supplier of woodfree coated sheets, the results make it possible not only to see how the respondents rate your own performance, but it also brings a light to customers' perception of your competitors. Are there areas you need to improve in order to be able to compete with other suppliers? What strengths and weaknesses do you have in the eyes of the customers? What strengths and weaknesses do your competitors seem to have?

Subscription fee

Top suppliers of Woodfree Coated Sheets in C&EE 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

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

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About “The Top Suppliers of Woodfree Coated Sheets” in Central & Eastern Europe

The study ranks the best suppliers of woodfree coated 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 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 close to 500 quantitative CATI-telephone interviews were carried out in four countries in Central & Eastern Europe; Austria, the Czech Republic, Hungary and Poland.

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.