

News Release

Opticom International Research



Drastic change in the BEI ranking for some WFC sheet brands in Western Europe, although the two top brands remain the same

Stockholm, Sweden, September 26, 2008 - Opticom International Research today announced the results from the European study "The Brand Equity Tracking Survey - Woodfree Coated Paper" with the findings about **woodfree coated sheet brands in Western 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 1225 professional paper buyers in the sheetfed printing segment in Western Europe.

In total 44 different woodfree coated sheet brands have been tracked:

Allegro	Core	Go	Maine Gloss	Regency
Arctic	Creator	G-Print	Maxigloss, -satin, -silk	Satimat
Black Label	Daco	HannoArt	Mega	Starline
BVS	Essential	Heaven 42	MultiArt	Symbol
Challenger	EuroArt Plus	Hello	NopaCoat Prestige/Stratos	Tempo
Chromomat	Furioso	Ikono	Novatech	Tom & Otto
Claro	Galaxi	LumiArt, -Silk	Printover	TripleStar
Condat Matt Périgord	Galerie Art	Luxo	Profi	UPM Finesse
Condat Gloss/Silk	Garda	Magno	R4/R4 Chorus	

The 2008 Brand Equity Index ranking list according to sheetfed printers in Western Europe looks as follows (the position in last year's survey within brackets):

Top Brands in Europe according to heatset web offset printers

<u>Rank</u>	<u>Brand</u>	<u>Brand owner</u>
1.	Hello (1)	PaperlinX
2.	Novatech (2)	Antalis
3.	Magno (6)	Sappi
4.	Maine Gloss (5)	Arjo Wiggins
5.	Garda (8)	Cartiere Garda/Lecta
6.	Satimat (3)	Arjo Wiggins
7.	Claro (NEW)	Antalis
8.	Creator (7)	Torraspapel/Lecta
9.	BVS (9)	Scheufelen
10.	Lumi (16)	Stora Enso
11.	MultiArt (19)	Papyrus
12.	Condat (4)	Condat/Lecta
13.	Black Label (13)	Antalis
14.	Mega (NEW)	M-real
15.	Galaxi (10)	Inapa
16.	Chromomat (11)	Arjo Wiggins
17.	TripleStar (18)	Sappi/Papyrus
18.	Tom & Otto (BACK)	Antalis
19.	Maxi (15)	Igepa
20.	R4/R4 Chorus (17)	Burgo
21.	Condat Matt Périgord (20)	Condat/Lecta
22.	Core (12)	PaperlinX

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

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Allegro is the only brand not qualifying this year (#14 in last year's BEI ranking).

Key findings:

- The top 2 brands, Hello and Novatech, remain in their positions whereas the ranking order for some other brands has changed drastically. There are just as many brands that show great improvement as deterioration though. Examples of brands with good results this year are Claro (qualifying for the first time and makes it to #7 in the ranking), Lumi (#10 this year vs #16 last year), MultiArt (#11 this year vs #19 last year), Mega (qualifying for the first time and makes it to #14) and Tom & Otto (back in the ranking list as #18).
- About half of the brands qualifying for the BEI are mill brands the other half are merchant brands, showing that no matter the brand owner, both actors have the same chances of creating a strong brand.
- Hello seems to be unthreatened in the top since it is ranked #1 for the 9th time and has proved to be the strongest brand since the start-up of this study.
- Even though criteria related to the product quality still are regarded as the strongest determining factors when buying a certain woodfree coated sheet brand, other non-quality factors are gaining importance. This development could be the result from a certain quality level that more or less all suppliers can offer nowadays, making other attributes important in order to stand out in the competition
- Environmental issues are getting more important but the outcome varies a lot depending on country.
- Although under a lot of pressure due to tough market condition and therefore ranking total value for money highly, sheetfed printers do not appear to be as price sensitive as web printers.

Why would you be interested in this survey?

- > Do you know how your customers view your brand? Which strengths and weaknesses does it have?
- > Where do you need to focus your efforts in order to create a stronger position for your brand?
- > Where does your brand stand in the competition? Where does it stand in comparison with your toughest competitor?
- > How can you best market your brand? Which attributes should you tie to your brand, and how well do you fulfil the brand promises?
- > Are you considering breaking new grounds in new markets?
- > Do you want to try to increase your market share? How can you convince customers to rather choose your brand than the one currently used?

The findings in this survey provide useful information about factors that can make a customer buy a certain brand (or switch to another one for that matter) and should be considered valuable information not only to the sales force, but also to marketing departments handling marketing communication and market/business planning. Knowing your customers (current as well as potential) and how they view various matters is the key to successful business.

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

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Subscription fee

	Full survey	Executive summary & analysis	Belgium	France	Germany	Italy	Spain	the Netherlands	the UK
WFC 2008 WE Fees (Euro)	29 000	10 000	5 000	5 000	5 000	5 000	5 000	5 000	5 000

The full survey includes the result based on findings from sheetfed printers in all seven markets (Belgium, France, Germany, Italy, Spain, the Netherlands and the UK) with the following deliverables:

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

- > A set of 8 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 7 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 "The Top Brands of Woodfree Coated Paper" in Western Europe

The study ranks the most valuable woodfree coated brands in Western Europe according to a Brand Equity Index composed of four main drivers; spontaneous awareness, top-of-mind, quality & associations and loyalty. The quality & associations 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

The Loyalty Index measures the likelihood of respondents switching to another brand given certain criteria, the satisfaction of a brand as well as buying frequency.

A brand must be evaluated by at least ten respondents in a minimum of two different markets in order to qualify for the total Brand Equity Index.

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The fieldwork was conducted in April-May 2008. A total of 1225 quantitative CATI-telephone interviews were carried out in seven markets; 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.