

News Release

Opticom International Research



Well-known brands have so far not claimed the position as the leading environmental brand

Stockholm, Sweden, October 8, 2009 - Opticom International Research today announces the results from "The Brand Tracking Survey - Woodfree Coated Paper 2009" whereby **the most known, bought and appreciated woodfree coated sheet brands in Western Europe are defined.**

The results are based on interviews with 885 professional paper buyers in the sheet-fed offset printing segment across seven Western European countries; Germany, the UK, France, Belgium, the Netherlands, Spain and Italy. Total as well as country specific results are available. The survey shows that some brands are more known than bought and also that some brands more often are the printer's main brand than others. Also, top brands from a quality associations' point of view are not necessarily the best known brands.

Environmental aspects are heavily discussed at many seminars and conferences and for most, if not all, paper producers and merchants, environmental responsibility is very high up on the agenda. Opticom has also given the environment a special emphasis in this year's survey as it measures printer expectations on the environmental credentials/friendliness when selecting a brand and printer perceptions of the performance of their current main brand/s with respect to environmental credentials/friendliness. For the first time ever, Opticom also asked printers to mention the leading woodfree coated sheet brand from an environmental point of view and why that brand is perceived to be superior to other brands. The outcome first of all sends a signal of a need to better educate the printers in environmental issues. According to project manager Jessica Tommila, the results indicate some very interesting opportunities for brand owners as no brand so far has claimed the position as THE leading environmental woodfree coated sheet brand in Western Europe. Symbol and Novatech are the two most frequently mentioned woodfree coated sheet brands, closely followed by Hello, Maine and Condat. None of them are mentioned by a very large share of the printers though.

Opticom has tracked awareness of woodfree coated sheet brands since 1999 and for the first time, makes public the list of most well-known brands in the Western European market. The table below shows the top 20 brands in 2009 based on their spontaneous awareness* among sheet-fed offset printers in Western Europe: *(brands marked in green show a positive development in % vs. 2008)*

The most well-known brands in Western Europe			
Based on spontaneous awareness among sheet-fed offset printers			
Rank 2009	Rank 2008	Brand	Brand owner
1	1	Hello (-)	PaperlinX
2	4	Maine Gloss (+)	ArjoWiggins
3	2	Profi (+)	Igepa
4	7	Novatech (+)	Antalis
5	10	Satimat (+)	ArjoWiggins
6	5	Garda (=)	Lecta /Cartiere Garda
7	3	Luxo (-)	Papyrus
8	6	Magno (-)	Sappi
9	8	Creator (-)	Lecta / Torraspapel
10	12	Lumi (+)	Stora Enso
11	11	Condat (+)	Lecta / Condat
12	9	Galaxi (+)	Inapa / Papierunion
13	18	Claro (+)	Antalis
14	15	Chromomat (+)	ArjoWiggins
15	17	Burgo (+)	Burgo
16	14	Maxi (-)	Igepa
17	16	R4/R4 Chorus (+)	Burgo
18	13	BVS (-)	Scheufelen
19	21	MultiArt (+)	Papyrus
20	19	Black Label (-)	Antalis

*Absolute figures weighted using paper consumption per country according to Cepi Fine

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Hello has, since the start of the brand tracking, been and still is clearly the number one brand from a spontaneous awareness point of view. It has a strong position in most of the markets included in this survey. However, compared to earlier surveys, the % gap to competing brands has become smaller.

Out of the top ten brands, only Novatech has a similar geographical spread to Hello as it is a top ten brand in all the six markets where it is distributed. Most other brands have a more limited geographical basis for their total awareness score. Profi and Luxo, the top two brands in Germany and Garda, the clear number one brand in Italy are the most local brands in the total top ten list, but to some extent that is also applicable to Creator, the leading woodfree coated sheet brand in Spain.

As the survey has been conducted since 1999 it enables defining trends over time. The results from this year's survey raise questions for some of the top brands. Is a decline in the share of printers mentioning the brand as bought temporary or the start of a negative trend for that brand? Is an increased awareness vs. 2008 after a very stable awareness level 2005-2008, the start of a positive trend or just temporarily positive for that brand?

The survey not only ranks woodfree coated sheet brands based on how well-known they are but also based on how well they meet sheet-fed offset printers' expectations on a number of quality performance criteria. It also identifies the level of loyalty towards the brand in terms of the likelihood of being purchased again in one year's time.

When it comes to expectations on the quality features of the brands and their performance, printers first of all value consistent quality, runnability, printability and value for money. In line with the financial crisis, the latter has also become more important vs. previous editions of the survey.

The survey adds value to you if you are interesting in finding out any of the following:

- > How do your customers (the printers) view your brand/the brand that your paper is re-sold as? What overall strengths and weaknesses does it have?
- > Is your brand or the brand that your paper is distributed as, well-known where distributed? That is, does its awareness reflect its availability in the various markets?
- > What do users of your brand/the brand that your paper is re-sold as, value when it comes to quality characteristics?
- > How well does your brand/the brand that your paper is distributed as, fulfil printer demands; both in absolute terms and in relation to competition?
- > How important are the environmental aspects to a printer when selecting brand and printers selecting your brand in particular?
- > Is your brand one of the leading brands from an environmental point of view?
- > Is there a risk in printers not selecting your brand in one year's time? If so, why?

The findings provide useful information that enables brand owners to for example:

- > Define where to focus their efforts in order to create a stronger position for their brands; is it question of raising awareness of the brand or more influencing printers' quality perceptions or even improving the actual quality of the brand?
- > Analyse their brands' positions in the various markets and printer segments to see where they have competitive advantages and not. Though brand promises are not solely about product quality features, a lot of valuable input is provided when it comes to how to define the brand promise.
- > Understand how printers view the environmental aspects when selecting a woodfree coated paper brand

The information should be considered valuable not only to the sales force, but also to marketing departments handling marketing communication and market/business planning and development departments responsible for improving the quality of the brands. Knowing your customers (current as well as potential) and how they view various matters is the key to successful business.

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About Opticom's brand surveys for woodfree coated paper

Opticom International Research has since 1999 annually carried out an evaluation of the woodfree coated paper brands in Western Europe and since 2007 also in Central & Eastern Europe. Up to 2008, the total Brand Equity encompassing spontaneous awareness, top of mind, quality & associations and loyalty as well as purchasing determinants; frequency, drivers, were measured annually. As of 2009, the brand tracking will be concentrated to mainly awareness and quality aspects every second year and the total brand equity every other second year. The environmental aspects are likely to constitute a concurrent theme every year to enable tracking progress over time.

This year's survey ranks the woodfree coated paper brands based on how well-known they are in the respective market and printing segment (this news release referring to the Western European market for sheet-fed offset printing) and how well the brands meet printers' expectations on a number of quality performance criteria. The quality related criteria evaluated are:

- > Consistent quality
- > High runnability
- > Good printability
- > Fast ink setting & drying
- > High opacity
- > High whiteness
- > High bulk
- > Value for money
- > Wide range of paper qualities
- > Environmental credentials/friendliness

In addition to these criteria, the importance of net price and end use/r specification was also rated.

The survey has also indicated the level of loyalty towards the brand in terms of the likelihood of the brand being purchased again in one year's time and for the first time the survey identifies the leading woodfree coated sheet brands in Western Europe from an environmental point of view.

A brand must be evaluated by at least ten respondents in a minimum two different markets in order to qualify for the calculation of the Spontaneous Awareness Index, the Top of Mind Index and the Quality & Associations Index (quality expectations and relative performance of the brand).

A total of 885 quantitative CATI-telephone interviews were carried out in seven markets; Belgium, France, Germany, Italy, Spain, the Netherlands and the UK during June and July 2009.

The survey was also carried out among Western European web heat-set printers and sheet-fed offset printers in Central & Eastern Europe. The results are published in three different reports:

- > Western Europe Sheet-fed offset printers – this news release
- > Western Europe Web heat-set printers
- > Central & Eastern Europe Sheet-fed offset printers

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.