



CUTSIZE

BRAND AND SUPPLIER BENCHMARKING SURVEY

MAY-JUNE 2015



TERMS & CONDITIONS

Our products are supplied under the following terms and conditions, which cover material in all forms including paper, electronic, etc.:

CONFIDENTIALITY

All information provided is strictly confidential unless otherwise stated. The Client is responsible for safeguarding this confidentiality. The information contained in our publications is provided only for legitimate commercial purposes; it is not to be used in legal or anti-trust action against others.

COPYRIGHT

At EMGE we aim to assist clients in using our information, however it is your individual responsibility as well as that of your company to abide by the rules and regulations as set out under European & International copyright law.

Terms for standard usage

- Making copies of our work is not permitted. No part of any EMGE publication may be reproduced in any form, for external or internal use, without prior written permission from EMGE.
- You do, however, have permission to replicate small samples of non-sensitive information as required, on the condition that you clearly acknowledge the source.
- If you have any doubts as to the legitimate use of our information, please contact EMGE.

Terms for Groupwide Distribution Licence holders only

- Copies of EMGE publications purchased under a Groupwide Distribution Licence may be distributed internally within the group only. Normally licences are granted under a regional basis, unless specified as a Global Groupwide Licence.
- None of the material provided may be copied or shown to other companies, industry consultants, finance companies or investment houses, under any circumstances.
- You do, however, have permission to replicate small samples of non-sensitive information as required, on the condition that you clearly acknowledge the source.
- If you have any doubts as to the legitimate use of our information, please contact EMGE.

DISCLAIMER

While we aim to ensure that the information contained in our publications is as reliable as possible, we cannot accept responsibility for actions or decisions taken by the client, other company or person arising from our work.

EMGE & Co. Ltd.
PO Box 200
Truro
Cornwall
TR1 1FN
United Kingdom

Tel: +44 (0)1872 581000 | Fax: +44 (0)1872 264464

Email: post@emge.com | URL: www.emge.com

Deliverables and Support Service

Our aim in this report is to provide the basic survey results, and the report contains an Executive Summary and the detailed statistical tables.

In addition to this report, clients may optionally obtain a SUPPORT SERVICE from EMGE, which can include:

- a) Private Presentations
- b) Tailor-made analysis specific to your company
- c) Database, supplied in Excel file format, covering anonymous individualised responses.

For further information contact either:

Darren Clargo (dclargo@emge.com) +44 1872 581 000

Iwan Le Moine (iwan@emge.com) +44 1872 581 000

Table of Contents

	Page
A) INTRODUCTION	A
– Methodology	
ES) EXECUTIVE SUMMARY	1
– Overall results and commentary	
1. BRAND AWARENESS	9
– Spontaneous awareness of cutsize brands	
2. BRAND BENCHMARKING - IMPORTANCE	23
– Importance ratings of factors for brands	
3. BRAND BENCHMARKING - PERFORMANCE	25
– Performance ratings of brands per factor	
4. BRAND TRENDS	65
– Internal brand desirability	
5. SUPPLIER BENCHMARKING - IMPORTANCE	81
– Quality and service factors of importance, when selecting a supplier	
6. SUPPLIER BENCHMARKING - PERFORMANCE	85
– Comparative performance ratings of named suppliers for specific quality and service factors	

List of Figures/Tables

	<i>Page</i>
1. <i>Respondent Summary</i>	<i>C</i>
2. <i>Major Mill Suppliers - Total Europe</i>	<i>D</i>
3. <i>Mill Brands vs. Non-Mill Brands – Total Europe</i>	<i>E</i>
4. <i>Brand Awareness – Total Europe</i>	<i>1</i>
5. <i>Brand Importance Factor Ratings – Total Europe</i>	<i>2</i>
6. <i>Brand Performance Ratings – Total Europe</i>	<i>3</i>
7. <i>Brand Performance Gap – Total Europe</i>	<i>4</i>
8. <i>Importance of Brand in Portfolio – Total Europe</i>	<i>5</i>
9. <i>Supplier Importance Factor Ratings – Total Europe</i>	<i>6</i>
10. <i>Supplier Performance Ratings – Total Europe</i>	<i>7</i>
11. <i>Supplier Performance Gap – Total Europe</i>	<i>8</i>
12. <i>Brand Awareness – Total Europe</i>	<i>9</i>
13. <i>Brand Awareness – West Europe</i>	<i>10</i>
14. <i>Brand Awareness – Germany</i>	<i>11</i>
15. <i>Brand Awareness – France</i>	<i>12</i>
16. <i>Brand Awareness – UK</i>	<i>13</i>
17. <i>Brand Awareness – Spain</i>	<i>14</i>
18. <i>Brand Awareness – Italy</i>	<i>15</i>
19. <i>Brand Awareness – Benelux</i>	<i>16</i>
20. <i>Brand Awareness – Nordic</i>	<i>17</i>
21. <i>Brand Awareness – Portugal</i>	<i>18</i>
22. <i>Brand Awareness – Austria / Switzerland</i>	<i>19</i>
23. <i>Brand Awareness – East Europe</i>	<i>20</i>
24. <i>Brand Awareness – Russia</i>	<i>21</i>
25. <i>Brand Awareness – Poland</i>	<i>22</i>
26. <i>Brand Importance Ratings – Total Europe</i>	<i>23</i>
27. <i>Brand Importance Ratings by Factor</i>	<i>24</i>
28. <i>Brand Importance Rankings by Factor</i>	<i>24</i>
29. <i>Brand Performance Summary - Total Europe</i>	<i>26</i>
30. <i>Brand Performance Ratings – Total Europe</i>	<i>27</i>
31. <i>Brand Performance Ratings – West Europe</i>	<i>28</i>
32. <i>Brand Performance Ratings – Germany</i>	<i>29</i>
33. <i>Brand Performance Ratings – France</i>	<i>30</i>
34. <i>Brand Performance Ratings – UK</i>	<i>31</i>
35. <i>Brand Performance Ratings – Spain</i>	<i>32</i>
36. <i>Brand Performance Ratings – Italy</i>	<i>33</i>

List of Figures (Continued)

37. <i>Brand Performance Ratings – Benelux</i>	34
38. <i>Brand Performance Ratings – Nordic</i>	35
39. <i>Brand Performance Ratings – Portugal</i>	36
40. <i>Brand Performance Ratings – Austria / Switzerland</i>	37
41. <i>Brand Performance Ratings – East Europe</i>	38
42. <i>Brand Performance Ratings – Russia</i>	39
43. <i>Brand Performance Ratings – Poland</i>	40
44. <i>Brand Performance Ratings by Factor – Total Europe</i>	41
45. <i>Brand Performance Rankings by Factor – Total Europe</i>	42
46. <i>Brand Performance Ratings by Factor – West Europe</i>	43
47. <i>Brand Performance Rankings by Factor – West Europe</i>	44
48. <i>Brand Performance Ratings by Factor – Germany</i>	45
49. <i>Brand Performance Rankings by Factor - Germany</i>	46
50. <i>Brand Performance Ratings by Factor - France</i>	47
51. <i>Brand Performance Rankings by Factor - France</i>	48
52. <i>Brand Performance Ratings by Factor - UK</i>	49
53. <i>Brand Performance Rankings by Factor - UK</i>	50
54. <i>Brand Performance Ratings by Factor - Spain</i>	51
55. <i>Brand Performance Rankings by Factor - Spain</i>	52
56. <i>Brand Performance Ratings by Factor - Italy</i>	53
57. <i>Brand Performance Rankings by Factor - Italy</i>	54
58. <i>Brand Performance Ratings by Factor - Benelux</i>	55
59. <i>Brand Performance Rankings by Factor - Benelux</i>	55
60. <i>Brand Performance Ratings by Factor – Nordic</i>	56
61. <i>Brand Performance Rankings by Factor - Nordic</i>	56
62. <i>Brand Performance Ratings by Factor – Portugal</i>	57
63. <i>Brand Performance Rankings by Factor - Portugal</i>	57
64. <i>Brand Performance Ratings by Factor – Austria / Switzerland</i>	58
65. <i>Brand Performance Rankings by Factor – Austria/Switz.</i>	58
66. <i>Brand Performance Ratings by Factor – East Europe</i>	59
67. <i>Brand Performance Rankings by Factor – East Europe</i>	60
68. <i>Brand Performance Ratings by Factor – Russia</i>	61
69. <i>Brand Performance Rankings by Factor - Russia</i>	61
70. <i>Brand Performance Ratings by Factor – Poland</i>	62
71. <i>Brand Performance Rankings by Factor – Poland</i>	63
72. <i>Importance of Brand in Portfolio – Total Europe</i>	66
73. <i>Importance of Brand in Portfolio - Total Europe</i>	67

List of Figures (Continued)

74. <i>Importance of Brand in Portfolio – West Europe</i>	68
75. <i>Importance of Brand in Portfolio - Germany</i>	69
76. <i>Importance of Brand in Portfolio - France</i>	70
77. <i>Importance of Brand in Portfolio - UK</i>	71
78. <i>Importance of Brand in Portfolio - Spain</i>	72
79. <i>Importance of Brand in Portfolio - Italy</i>	73
80. <i>Importance of Brand in Portfolio - Benelux</i>	74
81. <i>Importance of Brand in Portfolio - Nordic</i>	75
82. <i>Importance of Brand in Portfolio - Portugal</i>	76
83. <i>Importance of Brand in Portfolio – Austria / Switzerland</i>	77
84. <i>Importance of Brand in Portfolio – East Europe</i>	78
85. <i>Importance of Brand in Portfolio - Russia</i>	79
86. <i>Importance of Brand in Portfolio - Poland</i>	80
87. <i>Supplier Importance Ratings – Europe</i>	81
88. <i>Supplier Importance Ratings by Factor</i>	83
89. <i>Supplier Importance Rankings by Factor</i>	84
90. <i>Supplier Performance Summary - Total Europe</i>	86
91. <i>Supplier Performance Ratings - Total Europe</i>	87
92. <i>Supplier Performance Ratings – West Europe</i>	88
93. <i>Supplier Performance Ratings - Germany</i>	89
94. <i>Supplier Performance Ratings - France</i>	90
95. <i>Supplier Performance Ratings - UK</i>	91
96. <i>Supplier Performance Ratings - Spain</i>	92
97. <i>Supplier Performance Ratings - Italy</i>	93
98. <i>Supplier Performance Ratings - Benelux</i>	94
99. <i>Supplier Performance Ratings - Nordic</i>	95
100. <i>Supplier Performance Ratings – Portugal</i>	96
101. <i>Supplier Performance Ratings – Austria / Switzerland</i>	97
102. <i>Supplier Performance Ratings – East Europe</i>	98
103. <i>Supplier Performance Ratings - Russia</i>	99
104. <i>Supplier Performance Ratings - Poland</i>	100
105. <i>Supplier Performance Ratings by Factor – Total Europe</i>	101
106. <i>Supplier Performance Rankings by Factor – Total Europe</i>	102
107. <i>Supplier Performance Ratings by Factor – Total Europe</i>	103
108. <i>Supplier Performance Rankings by Factor – Total Europe</i>	104
109. <i>Supplier Performance Ratings by Factor - Germany</i>	105
110. <i>Supplier Performance Rankings by Factor - Germany</i>	106

List of Figures (Continued)

<i>111. Supplier Performance Ratings by Factor - France</i>	<i>107</i>
<i>112. Supplier Performance Rankings by Factor - France</i>	<i>108</i>
<i>113. Supplier Performance Ratings by Factor - UK</i>	<i>109</i>
<i>114. Supplier Performance Rankings by Factor - UK</i>	<i>110</i>
<i>115. Supplier Performance Ratings by Factor - Spain</i>	<i>111</i>
<i>116. Supplier Performance Rankings by Factor - Spain</i>	<i>112</i>
<i>117. Supplier Performance Ratings by Factor - Italy</i>	<i>113</i>
<i>118. Supplier Performance Rankings by Factor - Italy</i>	<i>114</i>
<i>119. Supplier Performance Ratings by Factor - Benelux</i>	<i>115</i>
<i>120. Supplier Performance Rankings by Factor - Benelux</i>	<i>116</i>
<i>121. Supplier Performance Ratings by Factor - Nordic</i>	<i>117</i>
<i>122. Supplier Performance Rankings by Factor - Nordic</i>	<i>118</i>
<i>123. Supplier Performance Ratings by Factor - Portugal</i>	<i>119</i>
<i>124. Supplier Performance Rankings by Factor - Portugal</i>	<i>120</i>
<i>125. Supplier Performance Ratings by Factor – Austria / Switzerland</i>	<i>121</i>
<i>126. Supplier Performance Rankings by Factor – Austria / Switzerland</i>	<i>122</i>
<i>127. Supplier Performance Ratings by Factor – East Europe</i>	<i>123</i>
<i>128. Supplier Performance Rankings by Factor – East Europe</i>	<i>124</i>
<i>129. Supplier Performance Ratings by Factor - Russia</i>	<i>125</i>
<i>130. Supplier Performance Rankings by Factor - Russia</i>	<i>126</i>
<i>131. Supplier Performance Ratings by Factor – Poland</i>	<i>127</i>
<i>132. Supplier Performance Rankings by Factor - Poland</i>	<i>128</i>

BLANK PAGE

A) Introduction

Survey of Cutsized Paper Suppliers and Brand Positioning

This report presents the summary results of an interview survey among the Trade (i.e. Paper Merchants, Original Equipment Manufacturers/OEMs) and Office Stationery Distributors/OSDs) of the image of cutsized paper Suppliers and Brands in Europe.

This is the 16th survey in the series.

The research focused on Suppliers and Brands, Awareness, Factors of Importance and Product/Supplier Performance.

The study involved 316 (246 in W.Europe and 70 in E.Europe) interviews with Merchants, OEMs and Stationery Distributors.

The interviews were performed during May/June 2015, across the countries listed below. The interviews were performed by telephone.

Countries included in the 2015 survey:

West Europe

Austria
Belgium
Denmark
France
Germany
Italy
Netherlands
Norway
Portugal
Spain
Sweden
Switzerland
UK

East Europe

Poland
Russia

A.1 Range of Questions Asked

BRAND AWARENESS

- Spontaneous awareness of cutsize brands

PRODUCT BENCHMARKING

- IMPORTANCE ratings for factors when choosing a brand of cutsize paper
- PERFORMANCE ratings for specific brands with each factor

Factors:

- *Physical Properties (bulk, smoothness, formation)*
- *Product Performance (runnability, e.g. no jams, low curl)*
- *Brand Reputation*
- *Regularity of Quality (consistent quality)*
- *Optical Appearance (e.g. brightness, whiteness, opacity)*
- *Advertising/Promotional Support*
- *Multifunctionality (all applications/all equipment)*

COMPANY BENCHMARKING

- Factors of IMPORTANCE when selecting a company to supply
- PERFORMANCE ratings for specific suppliers with each factor

Factors:

- *Account Management (responsiveness, professionalism, effectiveness, friendliness, market knowledge, ability to deliver)*
- *Overall Customer Service (sales force, admin, tech. support)*
- *Speed of Reaction to Price Movements*
- *Product Technical Performance*
- *Environmental Policy (relevant info. from suppliers)*
- *Reliability of Delivery (meeting delivery deadlines)*
- *Depth of Product Range*
- *Advertising/Promotional Support*
- *Flexibility of Pricing*
- *Availability of Packaging Alternatives (ordered delivery time)*
- *Lead Times*
- *Supplier Location*
- *Brand Reputation (identification)*
- *Innovative Marketing Approaches*

IMPORTANCE OF BRAND IN PORTFOLIO

- *Importance of this brand being in your portfolio*

A.2 Interview Numbers & Methodology

FIGURE I. RESPONDENT SUMMARY

Country	Merchants	OEMs	OSDs	Other	TOTAL	Purchasing	Sales
						Managers	Managers
GERMANY	24	1	9	6	40	19	21
FRANCE	13	3	18	1	35	17	18
UK	15	1	16	3	35	9	26
SPAIN	9	3	10	2	24	15	9
ITALY	8	1	19	3	31	19	12
BENELUX	8	9	6	8	31	18	13
NORDIC	14	1	5	0	20	5	15
PORTUGAL	4	2	2	2	10	7	3
AUSTRIA / SWITZ.	12	3	3	2	20	12	8
WEST EUROPE	107	24	88	27	246	121	125
RUSSIA	19	5	11	5	40	27	13
POLAND	3	4	20	3	30	15	15
EAST EUROPE	22	9	31	8	70	42	28
TOTAL EUROPE	129	33	119	35	316	163	153

EMGE & Co. Ltd © 2015

For this survey, a highly structured programme of interviews was devised, comprising 316 telephone interviews, including 129 Merchants, 33 OEMs, 119 OSDs and 35 Others (end users/retailers).

The respondent sample selection was compiled from our own existing information, complimented by other previous sources, including sponsors.

1537 mentions were obtained on Spontaneous Brand Awareness, 1018 ratings on Brand Performance and 704 ratings were obtained on Supplier Performance.