



# **CUTSIZE BENCHMARKING SURVEY 2018**



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# A) Introduction

## Survey of Cutsized office paper Brand and Mill Positioning

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

This is the 18<sup>th</sup> survey in the series.

The research focused on Brand/Mill Awareness, Importance and Performance.

The study involved 333 interviews (200 in West Europe and 133 in East Europe) with Merchants, OEMs, OSDs and Printers.

The interviews were performed during September and October 2018 and were performed by telephone, across the following countries:

### West Europe

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

### East Europe

Bulgaria  
Czech Republic  
Estonia  
Hungary  
Latvia  
Lithuania  
Poland  
Russia  
Slovakia

For presentation of results, these countries have been grouped as follows:

### West Europe

Germany / Austria / Switz.  
UK / Netherlands / Nordic  
France / Belgium / Lux.  
Italy / Portugal / Spain

### East Europe

Russia  
Poland / Baltics  
Bulgaria / Czech Republic / Hungary / Slovakia



## *A.1 Range of Questions Asked*

**BRAND AWARENESS** - Spontaneous awareness of cutsize office paper brands

**BRANDS STOCKED / SOLD** - Portfolio of brands sold or stocked

### **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

**MILL DISTRIBUTION** - Market penetration of mills

### **MILL BENCHMARKING**

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

Factors:

- ACCOUNT MANAGEMENT / OVERALL CUSTOMER SERVICE
- FLEXIBILITY OF PRICING / REACTION TO PRICE MOVEMENTS
- PACKAGING ALTERNATIVES (availability of)
- SHORT LEAD TIMES
- RELIABILITY OF DELIVERY (meeting delivery deadline)
- DEPTH OF PRODUCT RANGE
- INNOVATIVE MARKETING Approaches (e.g. creative promotions, communication, initiatives, etc.)
- SUSTAINABILITY Policy
- FINANCIAL POSITION OF MILL / SECURITY OF FIBRE SUPPLY

**SHIFT TO LOWER GRAMMAGES** – From 80gsm to 75gsm

**COLOUR LASER TO INKJET**– Shift from Colour Laser to Inkjet

**ENVIRONMENTAL IMPORTANCE** – Importance of environmental factors

## A.2 Sample Distribution & Methodology

FIGURE 1. SAMPLE DISTRIBUTION – BY SECTOR

Country	Merchants	OEMs	OSDs	Printers	Others	TOTAL
GER / AUT / SWI	30	3	14	3	1	51
UK / NL / NORD	24	2	19	7	2	54
FRA / BEL / LUX	18	4	19	3	2	46
ITA / POR / SPA	20	1	26	2	0	49
<b>WEST EUROPE</b>	<b>92</b>	<b>10</b>	<b>78</b>	<b>15</b>	<b>5</b>	<b>200</b>
RUSSIA	29	3	7	1	1	41
POL / BAL	19	4	21	2	0	46
BG / CZ / HU / SK	21	4	20	1	0	46
<b>EAST EUROPE</b>	<b>69</b>	<b>11</b>	<b>48</b>	<b>4</b>	<b>1</b>	<b>133</b>
<b>EUROPE</b>	<b>161</b>	<b>21</b>	<b>126</b>	<b>19</b>	<b>6</b>	<b>333</b>

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This year's survey included 333 interviews with respondents from across Europe, of which 161 were Paper Merchants, 21 were Original Equipment Manufacturers (OEMs), 126 were Office Supply Distributors (OSDs) and 19 were Printers.

For this survey, a highly structured programme of interviews was devised, comprising 333 telephone interviews, including 161 Merchants, 21 OEMs, 126 OSDs, 19 Printers and 6 other types of organisation.

FIGURE 2. SAMPLE DISTRIBUTION – BY POSITION

Region	Purchasing	Sales	Both	Other	TOTAL
GER / AUT / SWI	14	20	17	0	51
UK / NL / NORD	27	25	1	1	54
FRA / BEL / LUX	21	15	7	3	46
ITA / POR / SPA	27	15	3	4	49
<b>WEST EUROPE</b>	<b>89</b>	<b>75</b>	<b>28</b>	<b>8</b>	<b>200</b>
RUSSIA	7	31	0	3	41
POL / BAL	12	26	2	6	46
BG / CZ / HU / SK	16	30	0	0	46
<b>EAST EUROPE</b>	<b>35</b>	<b>87</b>	<b>2</b>	<b>9</b>	<b>133</b>
<b>EUROPE</b>	<b>124</b>	<b>162</b>	<b>30</b>	<b>17</b>	<b>333</b>

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Of the 333 respondents that participated in this year's survey, 124 were responsible for Purchasing, 162 were responsible for Sales, 30 were responsible for both (Purchasing and Sales) and 17 held other types of position.

This chart provides the sample distribution of Tier 1 survey respondents that were interviewed in Europe.

FIGURE 3. SAMPLE DISTRIBUTION – BY COMPANY SIZE					
Region	<500tpa	500-2000tpa	>2000tpa	DK/Refused	TOTAL
GER / AUT / SWI	14	6	28	3	51
UK / NL / NORD	11	9	31	3	54
FRA / BEL / LUX	11	6	20	9	46
ITA / POR / SPA	12	12	19	6	49
<b>WEST EUROPE</b>	<b>48</b>	<b>33</b>	<b>98</b>	<b>21</b>	<b>200</b>
RUSSIA	14	4	10	13	41
POL / BAL	14	15	7	10	46
BG / CZ / HU / SK	19	7	10	10	46
<b>EAST EUROPE</b>	<b>47</b>	<b>26</b>	<b>27</b>	<b>33</b>	<b>133</b>
<b>EUROPE</b>	<b>95</b>	<b>59</b>	<b>125</b>	<b>54</b>	<b>333</b>

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For this survey, a highly structured programme of interviews was devised, comprising 333 telephone interviews with respondents from the Trade, including 95 Small Businesses (selling less than 500 tonnes per annum), 59 Medium-sized Businesses (selling 500-2,000 tonnes per annum) and 125 Large Businesses (selling more than 2,000 tonnes per annum). 54 respondents did not disclose this information.

1503 mentions were obtained on Spontaneous Brand Awareness (roughly 4.5 brand mentions per respondent, on average) and 1032 mentions were obtained on Brands Stocked / Sold (roughly 3.1 brand mentions per respondent, on average).

1147 ratings were obtained on Brand Performance (around 3.4 rated brands per respondent, on average) and 918 ratings were obtained on Mill Performance (around 2.9 rated mills per respondent, on average).

## *A.3 Guidelines on Interpretation*

### *A3.1 Ratings*

Here are some general guidelines to consider when appraising the results.

- The ratings are shown over a range of 1 to 5, where 5 is the best result and 1 the worst
- Generally speaking, a rating of 4.0 or higher represents a distinct lead over the “pack”
- Similarly, a rating of between 3.4 and 3.7 represents an average result
- And a rating of below 3.0 is a poorer level

### *A3.2 Average Expectation Level (AEL)*

In the tables following, we show a line for the “Average Expectation Level (AEL)” rating, defined as “the Importance Rating given to the factor”, which we use as an indicator of expectations.

This rating indicates the degree of emphasis (i.e. Importance) that respondents placed on each factor, and in essence represents the “Ideal” or “Optimal” level to suit their requirements. The **Average Expectation Level (AEL)** rating should be compared to Brand/Mill Performance ratings, to evaluate how well brands and mills perform against the requirements of the respondents. We call this the “Performance Gap”

### *A3.3 Performance Gap (Satisfaction)*

The difference between the Average Expectation Level (i.e. Importance) level and the Performance rating represents the “**Performance Gap**”, which indicates how brands and mills are seen to over- or under- perform, relative to the requirements of respondents.

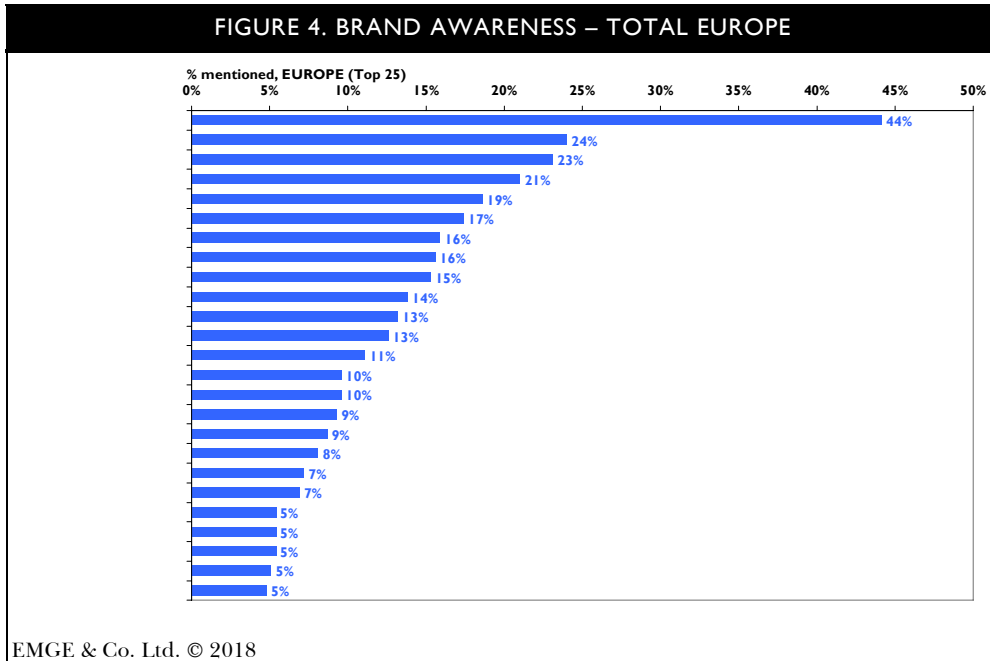
A large negative number means respondents are less satisfied compared to expectations, whereas a number close to or above zero indicates that expectations are almost being met or even being exceeded.

The Performance Gap is shown by factor and provides a good indication of the level of satisfaction among respondents for each of these issues.

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# ES) Executive Summary

## ES.1 Brand Awareness



\*\*\*\* was reported to be the most well-known brand in this year's survey, with 44% of respondents mentioning it spontaneously.

The above chart ranks the top 25 brands in order of overall **Brand Awareness (Spontaneous / Unprompted)**. The results show the total number of brand mentions as a percentage of the total sample (333).

As far as Brand Awareness is concerned, \*\*\*\* was reported to be the most well-known brand in this year's survey, with almost x in x (xx%) of respondents mentioning it spontaneously.

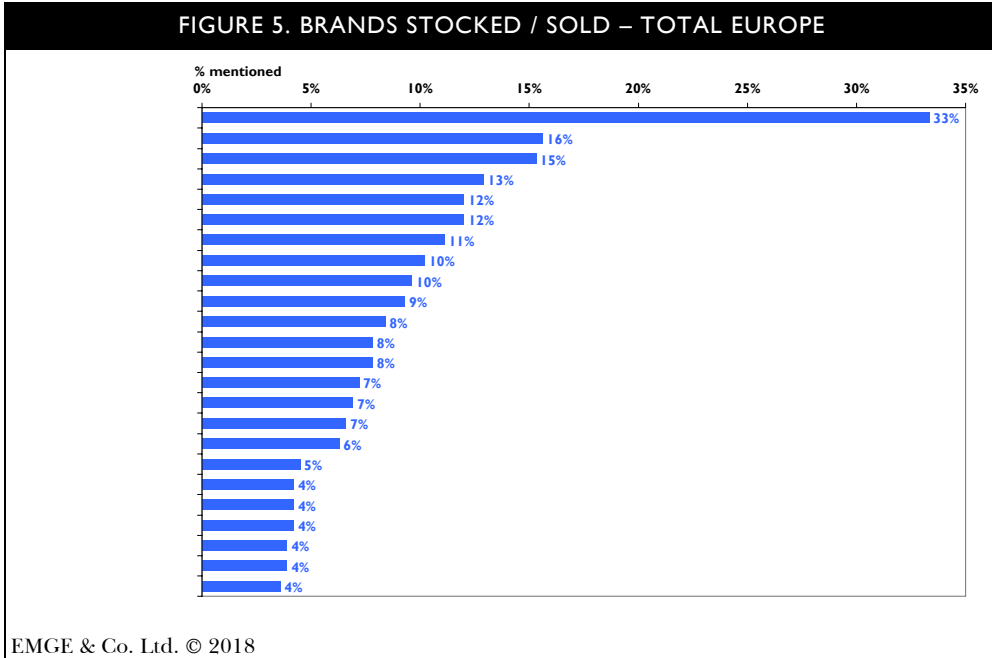
The 2<sup>nd</sup> and 3<sup>rd</sup>-most mentioned brands were \*\*\*\* and \*\*\*\*'s \*\*\*\*, while \*\*\*\* was also mentioned by at least x in x respondents.

There were xx additional brands that were mentioned by at least x in xx respondents, namely \*\*\*\*'s \*\*\*\*, \*\*\*\* and \*\*\*\*, \*\*\*\*'s \*\*\*\*, \*\*\*\*'s \*\*\*\*, \*\*\*\*'s \*\*\*\* and \*\*\*\*, \*\*\*\*'s \*\*\*\* and \*\*\*\*, \*\*\*\*'s \*\*\*\* and \*\*\*\*.

Other brands mentioned by at least x in xx respondents include \*\*\*\*'s \*\*\*\* and \*\*\*\*, \*\*\*\*'s \*\*\*\* and \*\*\*\*, \*\*\*\*'s \*\*\*\*, \*\*\*\*'s \*\*\*\* and \*\*\*\*, \*\*\*\*'s \*\*\*\* and \*\*\*\*'s \*\*\*\*.

ES.2 Brands Stocked / Sold

As well as being the most well-known brand, \*\*\*\* was also reported to be the most used brand by survey respondents.



The above chart ranks the top 24 brands in order of how much they are **stocked / sold** by survey respondents. The results show the total number of brand mentions as a percentage of the total sample (333).

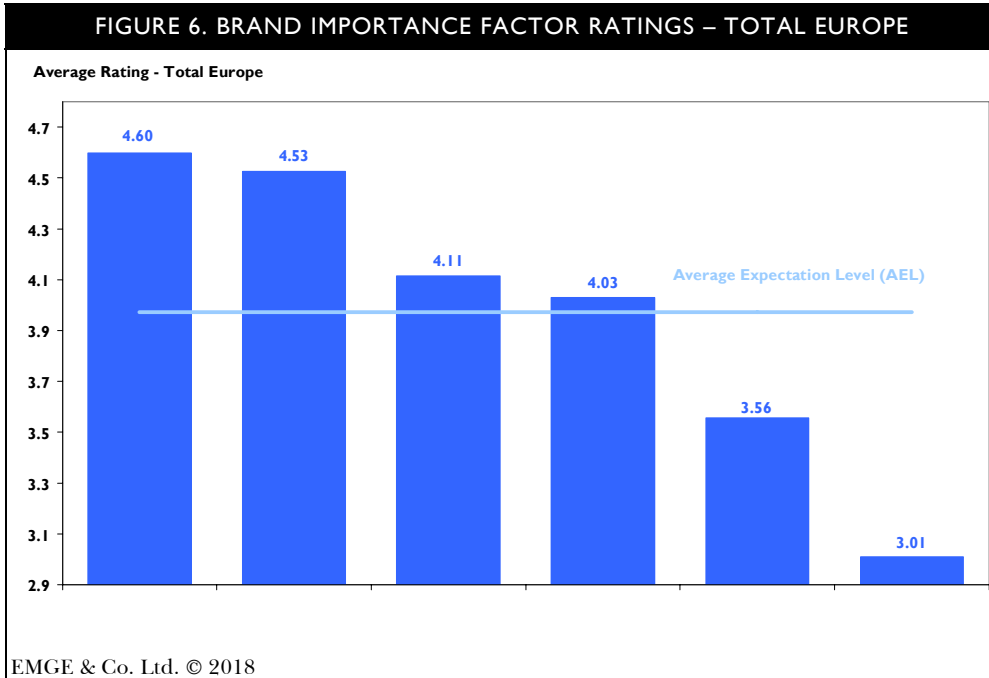
As well as being the most well-known brand, \*\*\*\* was also reported to be the most *traded / used* brand, with x in x respondents reporting that they stock / sell it.

Meanwhile, \*\*\*'s \*\*\*\*, \*\*\*\* and \*\*\*\*, which ranked 3<sup>rd</sup>, 5<sup>th</sup> and 7<sup>th</sup> in terms of Brand Awareness, were ranked 2<sup>nd</sup>, 3<sup>rd</sup> and 5<sup>th</sup> for Brands Stocked / Sold. Moreover, \*\*\*'s \*\*\*\*, which ranked 9<sup>th</sup> in terms of Brand Awareness, was ranked 4<sup>th</sup> for Brands Stocked / Sold.

In contrast, OEM brands \*\*\*\*, which ranked 2<sup>nd</sup> and 3<sup>rd</sup> in terms of Brand Awareness, were ranked 6<sup>th</sup> and 7<sup>th</sup> for Brands Stocked / Sold. Moreover, \*\*\*'s \*\*\*\*, which was ranked 6<sup>th</sup> for Brand Awareness, ranked 10<sup>th</sup> for Brands Stocked / Sold.

Other brands that were stocked / sold by at least x in xx respondents include \*\*\*'s \*\*\*\*, \*\*\*'s\*\*\*\*, \*\*\*\* and \*\*\*\*, \*\*\*\*, \*\*\*'s \*\*\*\*, \*\*\*' \*\*\*\*, \*\*\*'s \*\*\*\* and \*\*\*'s \*\*\*\*.

### ES.3 Brand Importance



xxxx was considered the most important factor when choosing a brand of Cutsite paper.

The ratings for Factors of Brand Importance are shown in the chart above.

According to survey respondents, **xxxx** is considered the most important factor when choosing a brand of cutsite paper, followed very closely by **xxxx**.

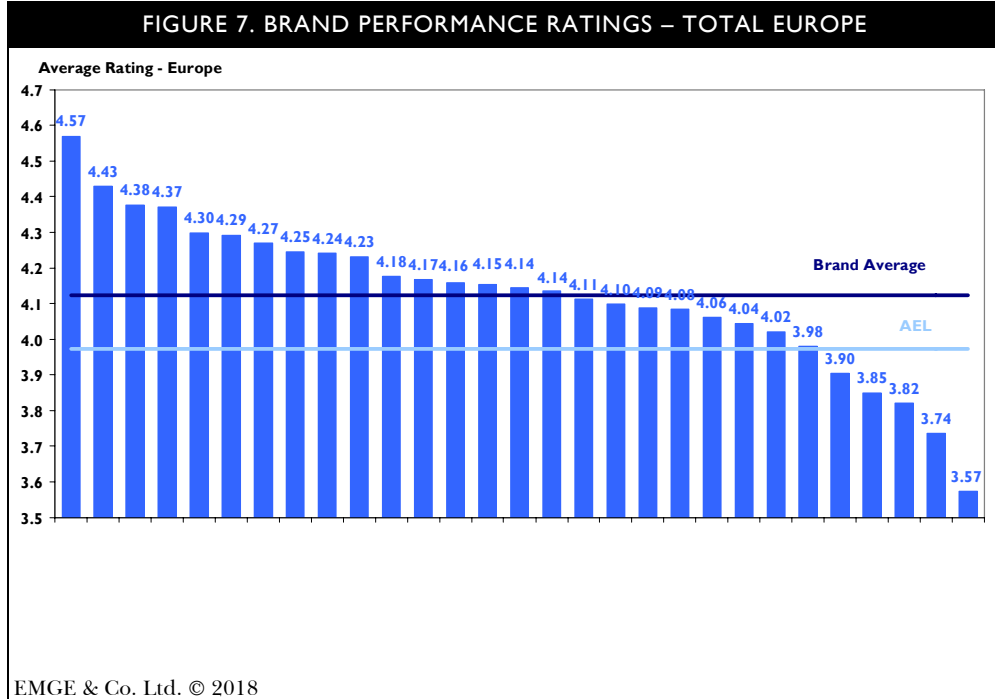
Meanwhile, physical attributes (**xxxx** and **xxxx**) were also considered important factors.

In comparison, **xxxx** and **xxxx** were reported to be less important brand factors, both falling well below the *Average Expectation Level (AEL)* - see definition on Page E.



### ES.4 Brand Performance

On average, brand performance exceeded the respondents' Average Expectation Level (AEL), meaning that the industry succeeds in achieving overall brand satisfaction.



The above chart summarises the overall performance results of the leading cutsize brands. The ratings are calculated as an average over all factors, weighted according to the individual importance of each factor.

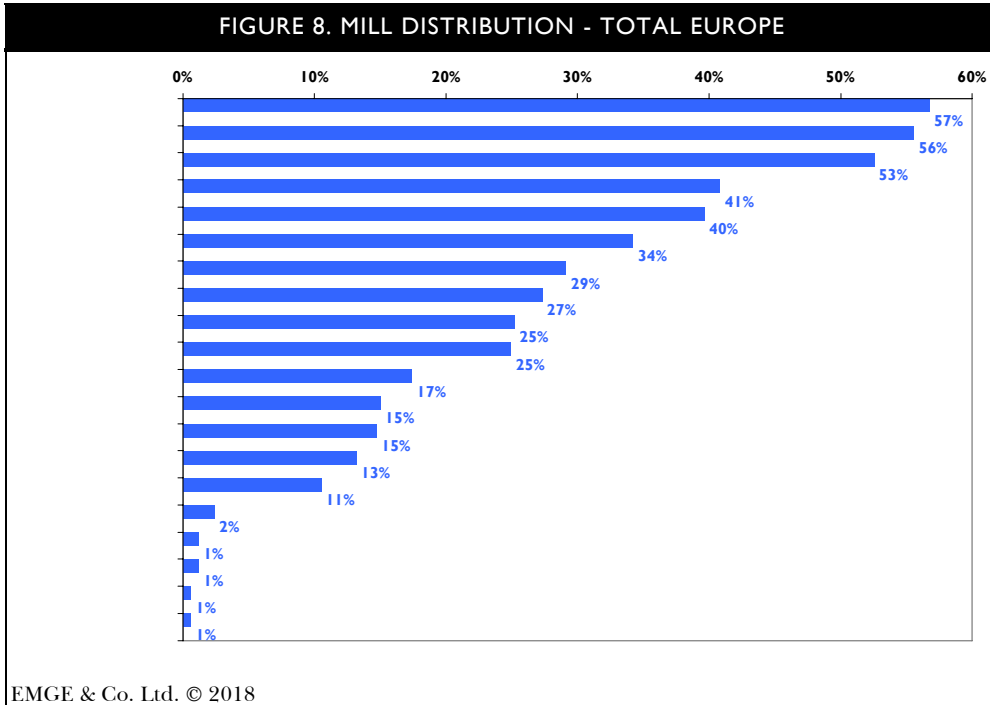
The chart also compares the *Average Expectation Level (AEL)* with the overall average Brand Performance average of all brands.

According to survey respondents, the overall performance level of brands (4.12) exceeded their overall expectations (3.97). In fact, 24 brands exceed the Average Expectation Level, with \*\*\*\*'s \*\*\*\* considered the best performing brand overall. \*\*\*'s \*\*\*\* and \*\*\*'s \*\*\*\* were ranked 2<sup>nd</sup> and 3<sup>rd</sup>, respectively.

\*\*\*'s \*\*\*\* and \*\*\*\*, \*\*\*\*'s \*\*\*\*, \*\*\*\* and \*\*\*\*, \*\*\*'s \*\*\*\* and \*\*\*\*, \*\*\*\*'s \*\*\*\*, \*\*\*\* \*\*\*\*, \*\*\*\*, \*\*\*\* and \*\*\*\*'s \*\*\*\* and \*\*\*\* also performed better than the overall brand performance average.

Eight other brands also exceeded respondents' expectations, namely \*\*\*'s \*\*\*\*, \*\*\*\*'s \*\*\*\*, \*\*\*'s \*\*\*\* and \*\*\*\*, \*\*\*\*, \*\*\*\*'s \*\*\*\*, \*\*\*\*'s \*\*\*\* and \*\*\*'s \*\*\*\*, although all of these fell below the overall brand performance average.

*ES.5 Mill Distribution*



This chart reflects the market penetration of each paper mill in Europe.

The above chart summarises the responses given to the question, “Which of these cutsize paper manufacturers is a major, minor or non-supplier to your office?” We provide a region-by-region breakdown of the results in a later chapter of this report, but here, we combine the “major supplier” and “minor supplier” responses for total Europe.

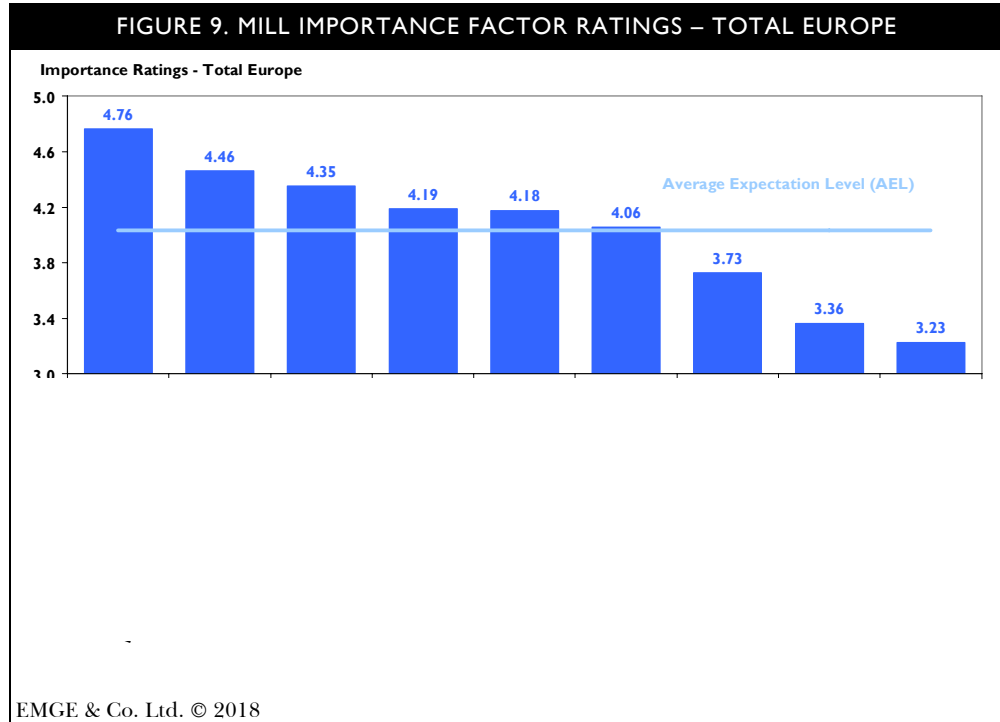
According to the interview results, three papermakers supply Cutsize paper to at least half of survey respondents, namely \*\*\*, \*\*\* and \*\*\*.

\*\*\*, \*\*\* and \*\*\* supply to at least x in x respondents, while \*\*\*, \*\*\*, \*\*\* and \*\*\*\* supply to at least x in x respondents.

\*\*\*, \*\*\*, \*\*\*, \*\*\* and \*\*\* were reported to supply at least x in x respondents, while \*\*\*, \*\*\*, \*\*\*, \*\*\* and \*\*\* were reported to be suppliers to a minority of respondents.

### ES.6 Mill Importance

xxxx is the most important mill factor this year.



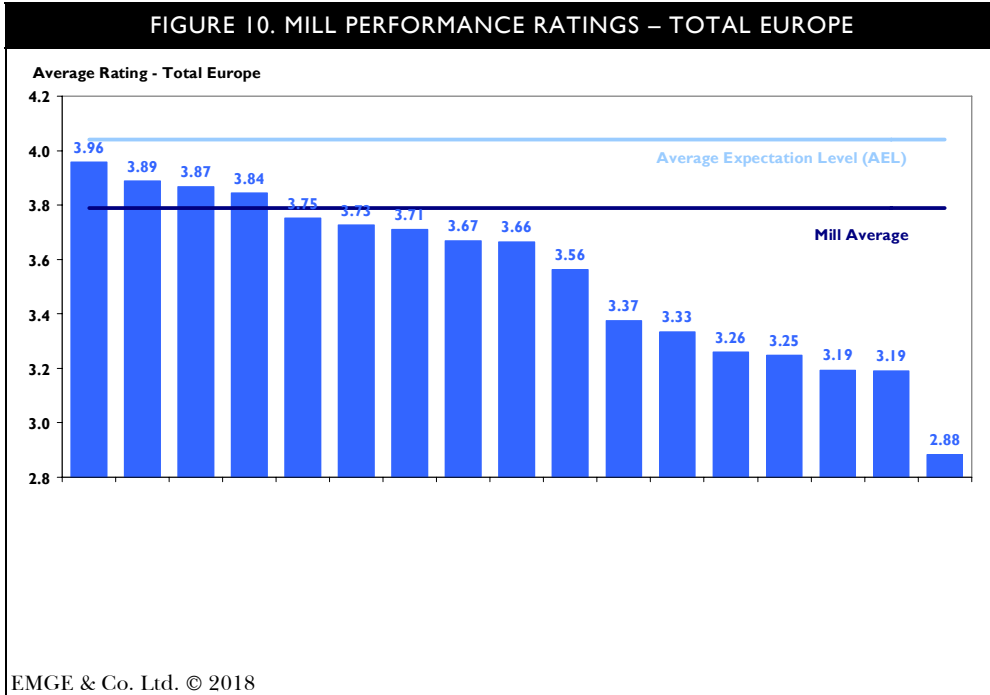
The above chart shows the Mill Importance factor ratings generated by the survey this year, representing respondents' expectations of their mills.

xxxx was considered the most important factor when choosing a supplier of Cutsized paper, while xxxx and xxxx were also reported to be important mill factors

xxxx, xxxx and xxxx also exceeded the overall Expectation Level of respondents.

At the other end of the scale, xxxx, xxxx and xxxx were considered less important factors when choosing a supplier of Cutsized paper.

ES.7 Mill Performance



While Brands perform better than the Average Expectation Level (AEL), Mills underperform, according to survey respondents.

The chart above shows the overall performance rating for each mill supplier of cutsize paper to survey respondents.

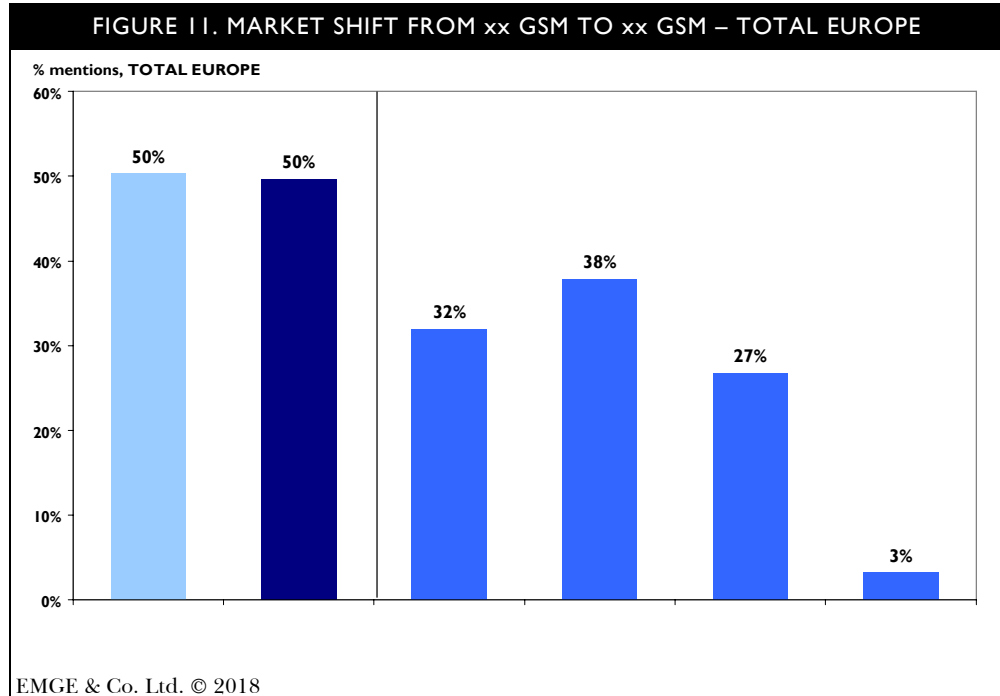
Unlike the brands, which exceeded our survey respondents' expectations overall, the Mills that produce these brands are perceived as underperforming, on average. In fact, not one mill achieved the expectation level of respondents (4.04), although \*\*\* came closest (3.96).

\*\*\*, \*\*\* and \*\*\* all exceeded the overall mill performance average (3.79), while \*\*\*\*, \*\*\*, \*\*\*, \*\*\* and \*\*\* came close.

Despite \*\*\*, \*\*\*, \*\*\*, \*\*\*, \*\*\*\*, \*\*\* and \*\*\* all performing less well than the overall mill average, they all achieved an average rating of at least 3 (out of 5), although \*\*\* and \*\*\* were rated lower overall.

## ES.8 Market Shift to Lower Grammages

xxxx of survey respondents reported seeing a shift from xxgsm to xxgsm in the market. Of those that reported seeing a shift to xxgsm, the xxxx said the shift was xxxx.



The chart above shows the overall survey results to a question concerning a shift to lower grammages in the market, specifically from xxgsm to xxgsm Cutsizes papers.

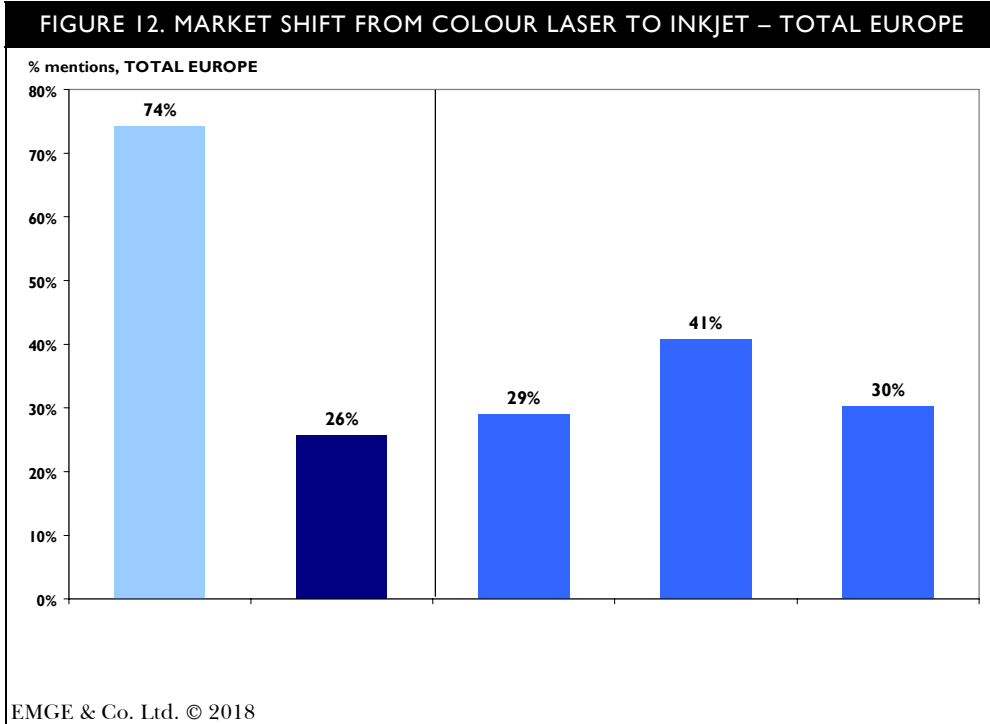
Of those respondents that reported seeing a shift to lower grammages, they were then asked to what extent the shift was happening.

Exactly \*\*\*\* of survey respondents mentioned seeing a market shift from xxgsm to xxgsm. The \*\*\*\* of these respondents reported that the shift was \*\*\*\*, while nearly x in x (xx%) reported that the shift was xxxx.

Around x in x respondents (xx%) reported a small shift to xxgsm, while a small minority were unsure.

We provide a region-by-region breakdown of these results later in the report.

*ES.9 Market Shift from Colour Laser to Inkjet*



x in x respondents reported seeing a shift from xxxx to xxxx in the market, of which the xxxx reported a xxxx shift.

The chart above shows the overall survey results to a question concerning a shift from Colour Laser to Inkjet in the market.

x in x (xx%) respondents reported seeing a market shift to xxxx, of which the xxxx said that the shift was xxxx.

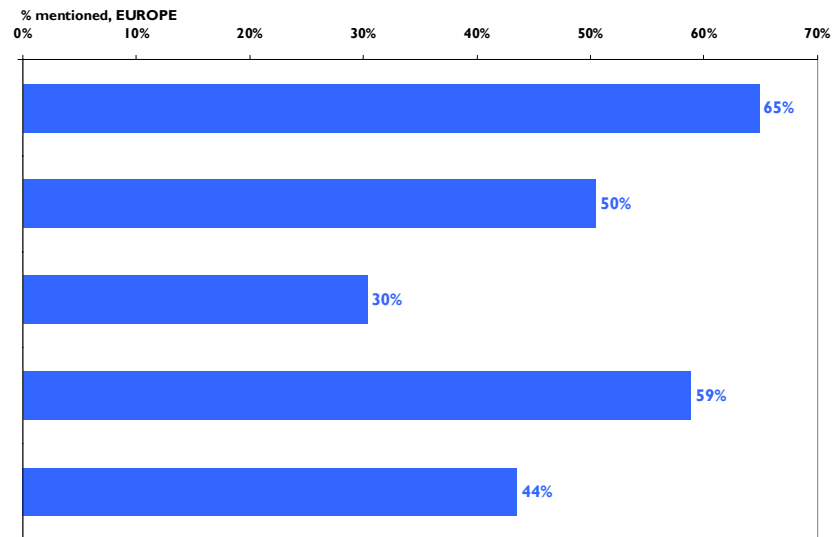
Of those remaining respondents that reported seeing a shift (excluding those that said moderate), xx% felt that the shift was xx and xx% felt that the shift was xxxx.

We provide a region-by-region breakdown of these results later in the report.

## ES.10 Environmental Importance

xxx was considered the most important Environmental factor when choosing a brand of Cutsized paper.

FIGURE 13. ENVIRONMENTAL IMPORTANCE FACTORS – TOTAL EUROPE



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The ratings for Factors of Environmental Importance are shown in the chart above.

According to survey respondents, **xxx** is considered the most important *environmental* factor when choosing a brand of cutsized paper, followed closely by **xxx**.

**xxx** was considered important by 1 in 2 respondents.

Meanwhile, **xxx** and **xxx** were considered less important Environmental factors.

Despite the relatively low environmental importance of **xxx** when choosing a brand of Cutsized paper, 1 in 2 survey respondents reported seeing this happening in the market, as mentioned earlier.

# 1 Brand Awareness

Which brands of cutsize office paper are you **AWARE** of?

## 1.1 Brand Awareness – Total Europe

FIGURE 14. BRAND AWARENESS (UNPROMPTED) – TOTAL EUROPE					
Brand	% Mentioned				
	1st	2nd	3rd	Other	TOTAL
**** (***)	18%	10%	8%	8%	44%
**** (***)	4%	7%	3%	10%	24%
**** (***)	4%	3%	6%	11%	23%
**** (***)	5%	3%	4%	9%	21%
**** (***)	4%	3%	3%	8%	19%
**** (***)	5%	2%	4%	7%	17%
**** (***)	2%	3%	4%	7%	16%
**** (***)	3%	2%	2%	8%	16%
**** (***)	2%	4%	3%	6%	15%
**** (***)	2%	4%	2%	6%	14%
**** (***)	4%	3%	2%	4%	13%
**** (***)	4%	2%	2%	6%	13%
**** (***)	5%	3%	1%	3%	11%
**** (***)	2%	5%	2%	2%	10%
**** (***)	1%	2%	1%	5%	10%
**** (***)	3%	1%	2%	3%	9%
**** (***)	2%	2%	2%	3%	9%
**** (***)	5%	1%	1%	1%	8%
**** (***)	0%	2%	2%	4%	7%
**** (***)	1%	2%	1%	3%	7%
**** (***)	1%	0%	1%	3%	5%
**** (***)	0%	2%	1%	3%	5%
**** (***)	1%	1%	0%	3%	5%
**** (***)	1%	1%	0%	3%	5%
**** (***)	0%	0%	0%	4%	5%
**** (***)	0%	2%	1%	2%	4%
**** (***)	2%	0%	1%	0%	4%
**** (***)	0%	1%	0%	2%	4%
**** (***)	0%	1%	0%	3%	4%
**** (***)	0%	1%	1%	2%	4%

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## 1.2 Brand Awareness – Germany, Austria & Switzerland

FIGURE 15. BRAND AWARENESS (UNPROMPTED) – GER / AUT / SWI					
Brand	% Mentioned				TOTAL
	1st	2nd	3rd	Other	
**** (***)	31%	12%	4%	14%	61%
**** (***)	10%	4%	8%	22%	43%
**** (***)	4%	2%	12%	14%	31%
**** (***)	8%	2%	2%	18%	29%
**** (***)	2%	4%	4%	18%	27%
**** (***)	0%	8%	6%	12%	25%
**** (***)	4%	2%	0%	18%	24%
**** (***)	4%	6%	2%	10%	22%
**** (***)	0%	2%	2%	18%	22%
**** (***)	0%	0%	4%	14%	18%
**** (***)	0%	2%	0%	16%	18%
**** (***)	6%	0%	2%	8%	16%
**** (***)	0%	4%	0%	12%	16%
**** (***)	2%	2%	0%	10%	14%
**** (***)	0%	2%	2%	10%	14%
**** (***)	0%	0%	0%	14%	14%
**** (***)	6%	2%	0%	4%	12%
**** (***)	4%	0%	0%	8%	12%
**** (***)	2%	0%	0%	10%	12%
**** (***)	0%	2%	0%	10%	12%
**** (***)	0%	2%	4%	6%	12%
**** (***)	0%	2%	0%	10%	12%
**** (***)	0%	0%	4%	8%	12%
**** (***)	0%	0%	2%	10%	12%
**** (***)	0%	2%	2%	6%	10%
**** (***)	0%	2%	0%	8%	10%
**** (***)	2%	2%	0%	4%	8%
**** (***)	0%	4%	0%	4%	8%
**** (***)	0%	0%	2%	6%	8%
**** (***)	2%	2%	0%	2%	6%
**** (***)	2%	0%	0%	4%	6%
**** (***)	0%	2%	0%	4%	6%
**** (***)	0%	0%	0%	6%	6%
**** (***)	0%	0%	0%	6%	6%
**** (***)	0%	0%	4%	2%	6%

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## 1.3 Brand Awareness – UK, Netherlands &amp; Nordic

FIGURE 16. BRAND AWARENESS (UNPROMPTED) – UK / NL / NORD					
Sample = 46 Brand	% Mentioned				TOTAL
	1st	2nd	3rd	Other	
**** (***)	22%	13%	7%	11%	54%
**** (***)	15%	6%	9%	6%	35%
**** (***)	7%	6%	7%	11%	31%
**** (***)	7%	6%	4%	13%	30%
**** (***)	2%	9%	6%	13%	30%
**** (***)	6%	6%	2%	9%	22%
**** (***)	4%	0%	7%	7%	19%
**** (***)	2%	4%	0%	9%	15%
**** (***)	2%	4%	2%	6%	13%
**** (***)	2%	0%	2%	9%	13%
**** (***)	0%	6%	2%	6%	13%
**** (***)	7%	0%	0%	4%	11%
**** (***)	2%	2%	0%	6%	9%
**** (***)	0%	2%	2%	6%	9%
**** (***)	0%	2%	4%	2%	7%
**** (***)	0%	2%	0%	6%	7%
**** (***)	4%	0%	0%	2%	6%
**** (***)	4%	0%	0%	2%	6%
**** (***)	2%	2%	0%	2%	6%
**** (***)	2%	0%	0%	4%	6%
**** (***)	0%	2%	2%	2%	6%
**** (***)	0%	0%	4%	2%	6%
**** (***)	0%	0%	2%	4%	6%
**** (***)	0%	4%	0%	0%	4%
**** (***)	0%	2%	0%	2%	4%
**** (***)	0%	2%	0%	2%	4%
**** (***)	0%	2%	0%	2%	4%
**** (***)	0%	0%	0%	4%	4%
**** (***)	0%	0%	0%	4%	4%
**** (***)	0%	0%	0%	4%	4%
**** (***)	0%	0%	0%	4%	4%
**** (***)	0%	0%	0%	4%	4%
**** (***)	0%	0%	0%	4%	4%
**** (***)	0%	0%	0%	4%	4%
**** (***)	2%	0%	0%	0%	2%
**** (***)	2%	0%	0%	0%	2%
**** (***)	2%	0%	0%	0%	2%

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### 1.4 Brand Awareness – France, Belgium & Luxembourg

FIGURE 17. BRAND AWARENESS (UNPROMPTED) – FRA / BEL / LUX

Sample = 46 Brand	% Mentioned				TOTAL
	1st	2nd	3rd	Other	
**** (***)	17%	9%	13%	11%	50%
**** (***)	22%	7%	11%	4%	43%
**** (***)	7%	11%	2%	20%	39%
**** (***)	2%	11%	4%	13%	30%
**** (***)	9%	9%	0%	9%	26%
**** (***)	2%	0%	4%	11%	17%
**** (***)	0%	2%	7%	9%	17%
**** (***)	2%	2%	2%	9%	15%
**** (***)	2%	7%	0%	2%	11%
**** (***)	2%	0%	0%	9%	11%
**** (***)	0%	4%	0%	7%	11%
**** (***)	4%	4%	0%	0%	9%
**** (***)	4%	2%	0%	2%	9%
**** (***)	0%	2%	2%	4%	9%
**** (***)	2%	0%	0%	4%	7%
**** (***)	2%	0%	0%	4%	7%
**** (***)	0%	2%	0%	4%	7%
**** (***)	0%	0%	0%	7%	7%
**** (***)	2%	2%	0%	0%	4%
**** (***)	2%	0%	2%	0%	4%
**** (***)	2%	0%	2%	0%	4%
**** (***)	0%	2%	2%	0%	4%
**** (***)	0%	0%	0%	4%	4%
**** (***)	2%	0%	0%	0%	2%
**** (***)	2%	0%	0%	0%	2%
**** (***)	0%	0%	0%	4%	4%
**** (***)	2%	0%	0%	0%	2%
**** (***)	2%	0%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	0%	2%	0%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	2%	0%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	2%	0%	2%
**** (***)	0%	0%	0%	2%	2%

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### 1.5 Brand Awareness – Italy, Portugal & Spain

FIGURE 18. BRAND AWARENESS (UNPROMPTED) – ITA / POR / SPA					
Sample = 49 Brand	% Mentioned				TOTAL
	1st	2nd	3rd	Other	
**** (***)	29%	18%	18%	6%	71%
**** (***)	16%	2%	4%	0%	22%
**** (***)	8%	4%	0%	8%	20%
**** (***)	2%	0%	0%	14%	16%
**** (***)	2%	2%	2%	8%	14%
**** (***)	0%	6%	4%	4%	14%
**** (***)	4%	4%	0%	4%	12%
**** (***)	2%	6%	4%	0%	12%
**** (***)	4%	4%	2%	2%	12%
**** (***)	2%	2%	2%	4%	10%
**** (***)	2%	0%	2%	6%	10%
**** (***)	0%	2%	0%	8%	10%
**** (***)	6%	0%	0%	2%	8%
**** (***)	4%	4%	0%	0%	8%
**** (***)	4%	0%	2%	2%	8%
**** (***)	0%	4%	2%	2%	8%
**** (***)	0%	0%	2%	6%	8%
**** (***)	2%	2%	0%	2%	6%
**** (***)	0%	2%	2%	2%	6%
**** (***)	4%	0%	0%	0%	4%
**** (***)	2%	0%	0%	2%	4%
**** (***)	0%	2%	0%	2%	4%
**** (***)	0%	0%	2%	2%	4%
**** (***)	2%	0%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	0%	2%	2%

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## 1.6 Brand Awareness – Russia

FIGURE 19. BRAND AWARENESS (UNPROMPTED) – RUSSIA					
Sample = 41 Brand	% Mentioned				TOTAL
	1st	2nd	3rd	Other	
**** (***)	34%	22%	7%	20%	83%
**** (***)	12%	37%	12%	12%	73%
**** (***)	17%	2%	20%	17%	56%
**** (***)	5%	2%	15%	34%	56%
**** (***)	10%	0%	5%	15%	29%
**** (***)	2%	5%	5%	17%	29%
**** (***)	0%	5%	5%	15%	24%
**** (***)	5%	7%	0%	5%	17%
**** (***)	2%	2%	0%	10%	15%
**** (***)	0%	5%	2%	5%	12%
**** (***)	2%	0%	2%	7%	12%
**** (***)	2%	2%	2%	2%	10%
**** (***)	0%	0%	0%	10%	10%
**** (***)	2%	0%	0%	5%	7%
**** (***)	2%	0%	0%	2%	5%
**** (***)	0%	0%	0%	5%	5%
**** (***)	2%	0%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	2%	0%	2%
**** (***)	0%	0%	2%	0%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	2%	0%	2%

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## 1.7 Brand Awareness – Poland &amp; Baltics

FIGURE 20. BRAND AWARENESS (UNPROMPTED) – Poland / BALTICS					
Brand	% Mentioned				
	1st	2nd	3rd	Other	TOTAL
**** (***)	39%	4%	4%	7%	54%
**** (***)	13%	13%	11%	15%	52%
**** (***)	4%	2%	9%	24%	39%
**** (***)	20%	0%	9%	7%	35%
**** (***)	0%	9%	4%	15%	28%
**** (***)	2%	4%	4%	15%	26%
**** (***)	0%	9%	2%	11%	22%
**** (***)	7%	2%	0%	11%	20%
**** (***)	4%	4%	2%	7%	17%
**** (***)	2%	2%	7%	7%	17%
**** (***)	0%	2%	0%	13%	15%
**** (***)	2%	2%	2%	7%	13%
**** (***)	0%	2%	7%	4%	13%
**** (***)	2%	2%	0%	7%	11%
**** (***)	0%	7%	2%	2%	11%
**** (***)	0%	4%	4%	2%	11%
**** (***)	0%	4%	2%	2%	9%
**** (***)	0%	4%	0%	4%	9%
**** (***)	0%	2%	0%	7%	9%
**** (***)	2%	0%	0%	4%	7%
**** (***)	0%	0%	0%	7%	7%
**** (***)	0%	0%	0%	7%	7%
**** (***)	0%	0%	0%	7%	7%
**** (***)	0%	0%	2%	4%	7%
**** (***)	0%	2%	0%	2%	4%
**** (***)	0%	2%	0%	2%	4%
**** (***)	0%	2%	0%	2%	4%
**** (***)	0%	0%	2%	2%	4%
**** (***)	2%	0%	0%	0%	2%
**** (***)	0%	2%	0%	0%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	2%	0%	2%
**** (***)	0%	0%	0%	2%	2%
**** (***)	0%	0%	2%	0%	2%

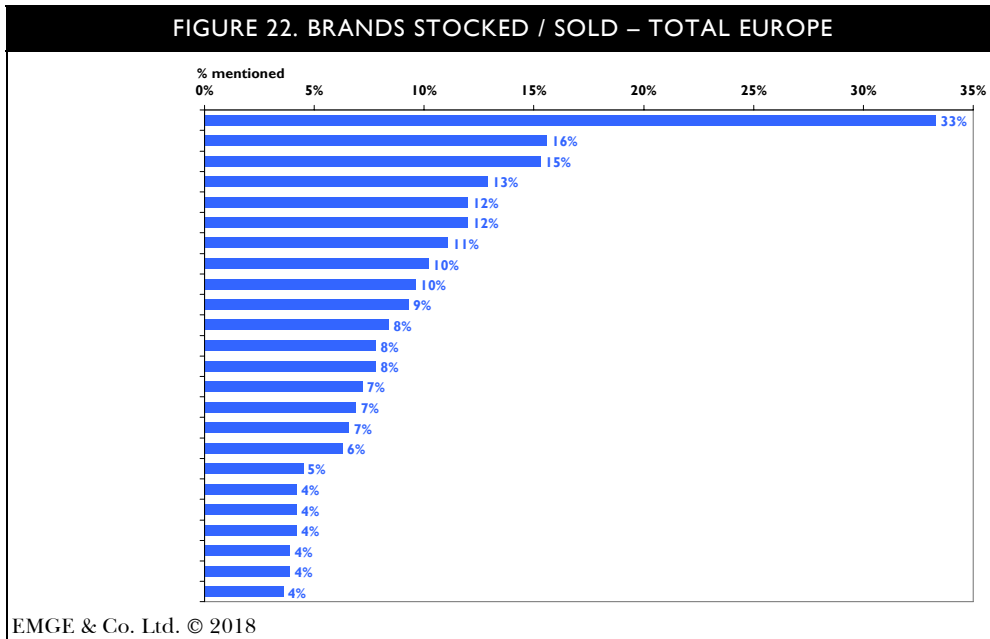
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## 2 Brands Stocked / Sold

Which brands of cutsize office paper do you **STOCK** or **SELL**?

### 2.1 Brands Stocked / Sold – Total Europe



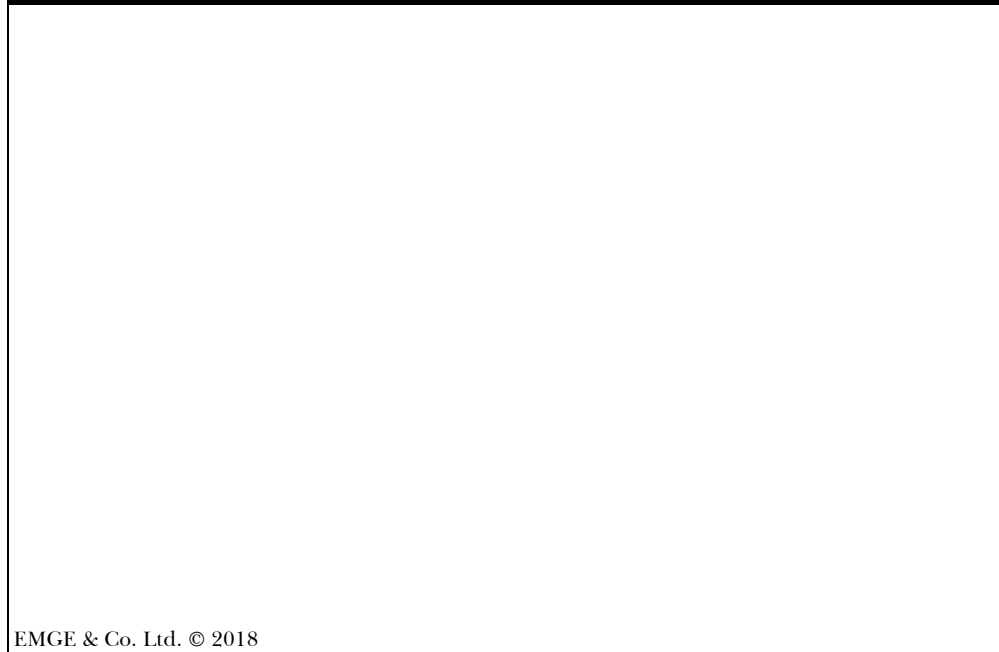
### 2.2 Brands Stocked / Sold – Germany, Austria & Switzerland





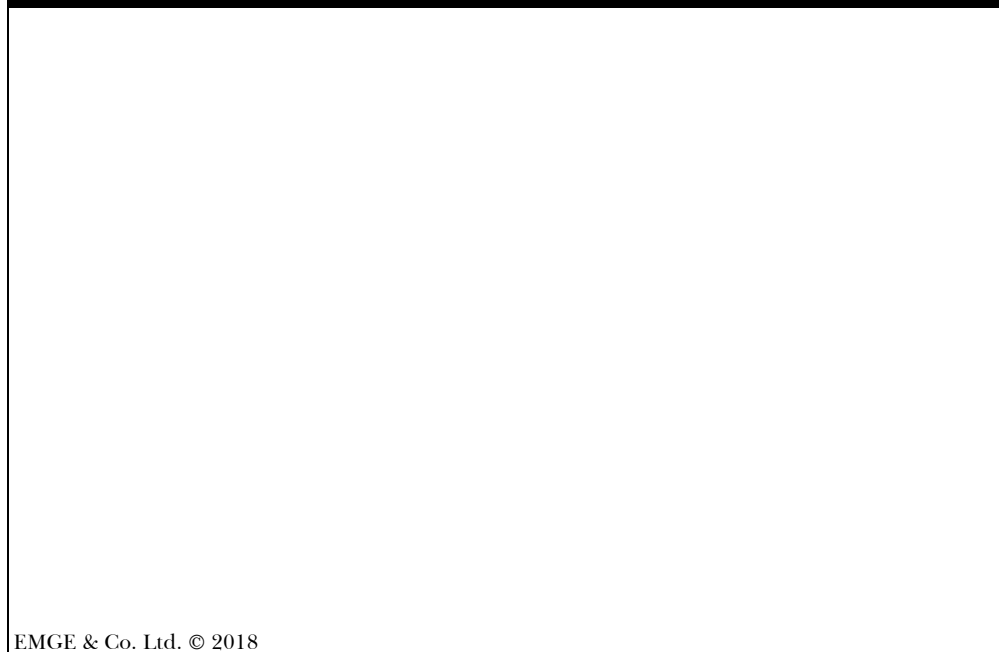
### 2.3 Brands Stocked / Sold – UK, Netherlands & Nordic

FIGURE 24. BRANDS STOCKED / SOLD – UK / NL / NORD



### 2.4 Brands Stocked / Sold – France, Belgium & Luxembourg

FIGURE 25. BRANDS STOCKED / SOLD – FRA / BEL / LUX



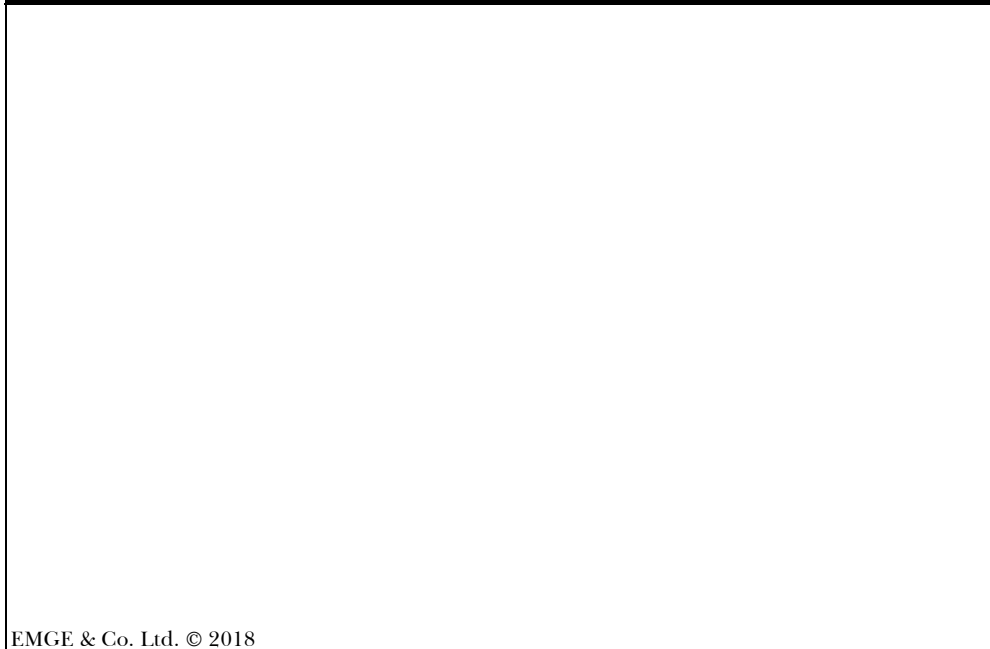
### *2.5 Brands Stocked / Sold – Italy, Portugal & Spain*

FIGURE 26. BRANDS STOCKED / SOLD – ITA / POR / SPA



### *2.6 Brands Stocked / Sold – Russia*

FIGURE 27. BRANDS STOCKED / SOLD – RUSSIA



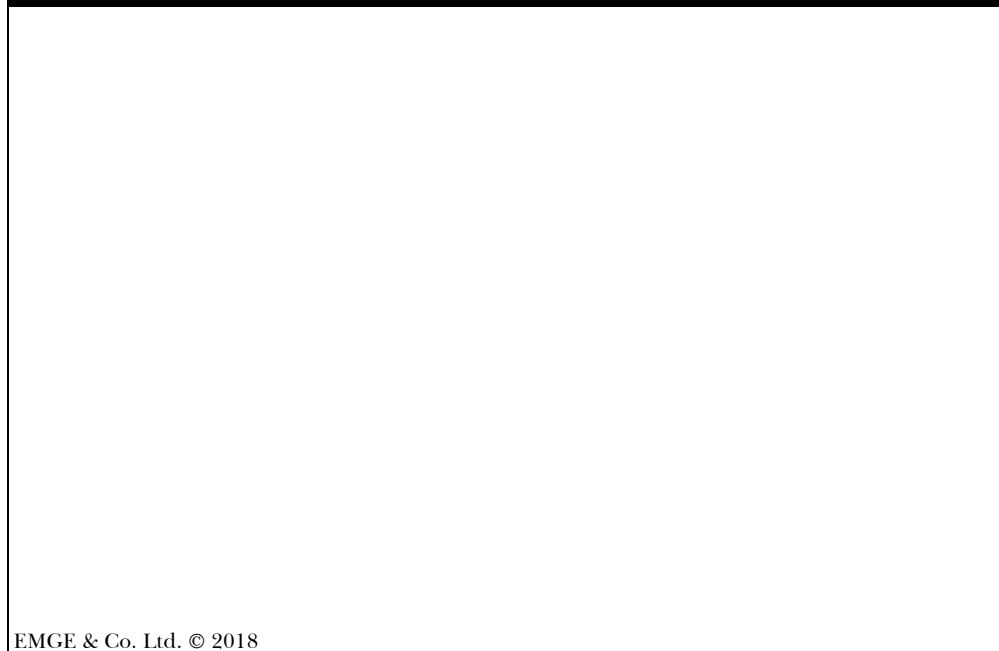
*2.7 Brands Stocked / Sold – Poland & Baltics*

FIGURE 28. BRANDS STOCKED / SOLD – Poland / BALTICS



*2.8 Brands Stocked / Sold – Bulgaria, Czech, Hungary & Sk.*

FIGURE 29. BRANDS STOCKED / SOLD – BG / CZ / HU / SK



## 3 Brand Importance

How **IMPORTANT** do you consider the following factors to be when choosing a **BRAND** of cutsize paper?

Scale: 1 = unimportant, 5 = very important

*The following factors were covered:*

- 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

**Average** is the simple arithmetic average of the individual ratings.

*Note: the factors in the chart below are shown in descending order of importance*

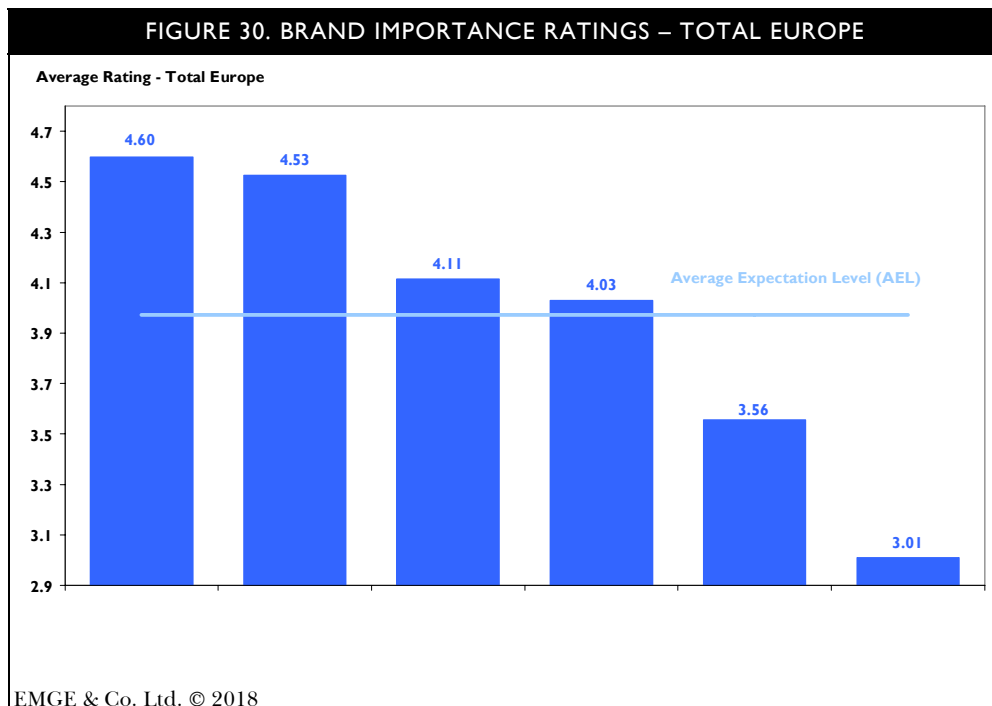


FIGURE 31. BRAND IMPORTANCE RATINGS – BY REGION

Region / Factor	Physical	Product	Brand	Regular	Optical	Advert.	AVERAGE	Sample
	Propert.	Perform.	Reput.	Quality	Appear.	Support		
GER / AUT / SWI	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	51
UK / NL / NORD	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	54
FRA / BEL / LUX	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	46
ITA / POR / SPA	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	49
<b>WEST EUROPE</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>200</b>
RUSSIA	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	41
POL / BAL	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	46
BG / CZ / HU / SK	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	46
<b>EAST EUROPE</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>133</b>
<b>TOTAL EUROPE</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>333</b>

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FIGURE 32. BRAND IMPORTANCE RANKINGS – BY REGION

Region / Factor	Physical	Product	Brand	Regular	Optical	Advert.
	Propert.	Perform.	Reput.	Quality	Appear.	Support
GER / AUT / SWI	3	2	5	1	4	6
UK / NL / NORD	3	2	5	1	3	6
FRA / BEL / LUX	4	1	5	2	3	6
ITA / POR / SPA	3	1	5	2	4	6
<b>WEST EUROPE</b>	<b>4</b>	<b>2</b>	<b>5</b>	<b>1</b>	<b>3</b>	<b>6</b>
RUSSIA	4	2	5	1	3	6
POL / BAL	4	2	5	1	3	5
BG / CZ / HU / SK	4	2	5	1	3	6
<b>EAST EUROPE</b>	<b>4</b>	<b>2</b>	<b>5</b>	<b>1</b>	<b>3</b>	<b>6</b>
<b>TOTAL EUROPE</b>	<b>4</b>	<b>2</b>	<b>5</b>	<b>1</b>	<b>3</b>	<b>6</b>

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# 4 Brand Performance

How do you rate the **PERFORMANCE** of each **BRAND** for each of the following factors?

Scale: 1 = poor, 5 = excellent

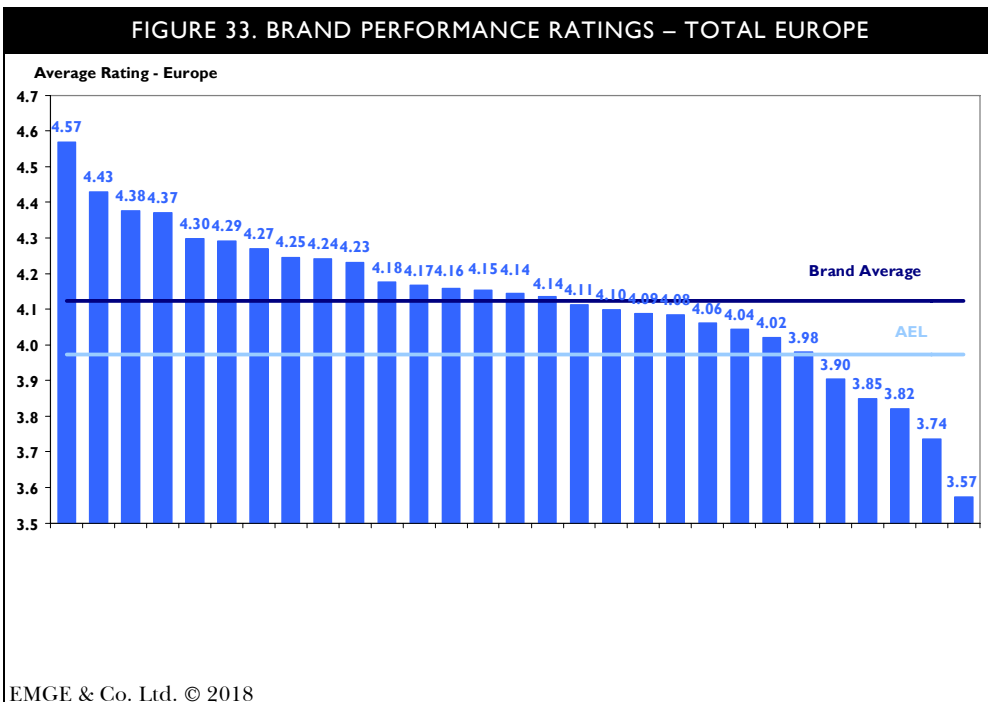
*The following factors were covered:*

- 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

**Average** is the average of the individual ratings, weighted by the "Average Expectation Level" rating for that factor in the country.

>> The "**Average Expectation Level**" (AEL) is the Importance rating – it reflects the expectations that respondents say is appropriate.

NOTE: Results based on small sample sizes may have little statistical significance.



## 4.1 Brand Performance Ratings – Total Europe

FIGURE 34. BRAND PERFORMANCE RATINGS – TOTAL EUROPE								
Region / Factor	Physical Propert.	Product Perform.	Brand Reput.	Regular Quality	Optical Appear.	Advert. Support	AVERAGE	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
*** (***)	4.7	4.7	4.5	4.7	4.7	3.9	<b>4.57</b>	118
*** (***)	4.6	4.7	4.4	4.7	4.4	3.5	<b>4.43</b>	78
*** (***)	4.5	4.5	4.1	4.7	4.6	3.4	<b>4.38</b>	15
*** (***)	4.5	4.5	4.2	4.6	4.4	3.7	<b>4.37</b>	27
*** (***)	4.4	4.5	4.2	4.6	4.4	3.2	<b>4.30</b>	18
*** (***)	4.3	4.6	4.1	4.6	4.1	3.7	<b>4.29</b>	42
*** (***)	4.7	4.6	4.3	4.5	4.5	2.4	<b>4.27</b>	25
*** (***)	4.4	4.4	4.3	4.5	4.6	3.0	<b>4.25</b>	24
*** (***)	4.4	4.6	4.2	4.5	4.2	3.1	<b>4.24</b>	37
*** (***)	4.2	4.5	4.3	4.5	4.2	3.3	<b>4.23</b>	28
*** (***)	4.3	4.3	4.4	4.2	4.1	3.7	<b>4.18</b>	23
*** (***)	4.1	4.3	4.4	4.5	4.1	3.5	<b>4.17</b>	50
*** (***)	4.1	4.3	4.3	4.3	4.2	3.5	<b>4.16</b>	29
*** (***)	4.1	4.4	4.3	4.4	4.2	3.2	<b>4.15</b>	56
*** (***)	4.4	4.6	3.8	4.3	4.4	3.4	<b>4.14</b>	18
*** (***)	4.2	4.4	4.1	4.3	4.2	3.2	<b>4.14</b>	53
*** (***)	4.4	4.6	3.9	4.3	4.3	2.0	<b>4.11</b>	10
*** (***)	4.3	4.3	3.9	4.4	4.5	2.8	<b>4.10</b>	10
*** (***)	4.0	4.2	4.3	4.2	4.2	3.5	<b>4.09</b>	24
*** (***)	4.1	4.3	4.3	4.3	4.1	3.3	<b>4.08</b>	38
*** (***)	4.4	4.5	3.5	4.5	4.3	2.8	<b>4.06</b>	11
*** (***)	4.2	4.4	3.8	4.2	4.3	3.0	<b>4.04</b>	34
*** (***)	4.1	4.1	3.8	4.5	4.0	3.3	<b>4.02</b>	35
*** (***)	4.0	4.2	3.8	4.3	3.7	3.8	<b>3.98</b>	34
*** (***)	4.2	4.1	3.7	4.3	3.8	2.9	<b>3.90</b>	14
*** (***)	4.1	4.2	3.4	4.1	4.1	2.6	<b>3.85</b>	10
*** (***)	3.8	3.7	3.7	4.1	4.0	3.3	<b>3.82</b>	12
*** (***)	4.1	4.2	3.4	4.1	4.0	2.1	<b>3.74</b>	11
*** (***)	3.6	3.8	3.5	3.9	3.6	2.9	<b>3.57</b>	12
Others								251
<b>Average/Total</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>1147</b>

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*Brand Performance Rankings – Total Europe*

FIGURE 35. BRAND PERFORMANCE RANKINGS – TOTAL EUROPE							
Region / Factor	Physical	Product	Brand	Regular	Optical	Advert.	AVGE.
	Propert.	Perform.	Reput.	Quality	Appear.	Support	
*** (**)	2	1	1	2	1	1	1
*** (**)	3	2	4	3	8	9	2
*** (**)	4	8	16	1	2	10	3
*** (**)	5	10	12	6	9	3	4
*** (**)	9	9	14	5	6	17	5
*** (**)	12	5	15	4	19	5	6
*** (**)	1	6	11	13	5	27	7
*** (**)	8	13	6	10	3	20	8
*** (**)	11	4	13	8	15	19	9
*** (**)	16	12	7	9	17	15	10
*** (**)	14	17	3	23	20	4	11
*** (**)	20	18	2	11	23	8	12
*** (**)	19	20	9	17	16	7	13
*** (**)	23	15	9	14	14	17	14
*** (**)	10	7	20	22	7	11	15
*** (**)	17	14	17	16	13	16	16
*** (**)	6	3	18	18	10	29	17
*** (**)	13	19	18	15	4	25	18
*** (**)	26	22	5	25	18	6	19
*** (**)	25	21	8	20	21	14	20
*** (**)	6	10	27	7	10	24	21
*** (**)	15	16	21	24	12	21	22
*** (**)	24	26	22	12	24	13	23
*** (**)	27	25	23	19	28	2	24
*** (**)	18	27	24	21	27	22	25
*** (**)	21	23	28	26	22	26	26
*** (**)	28	29	25	28	24	12	27
*** (**)	22	24	29	27	24	28	28
*** (**)	29	28	26	29	29	23	29

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## 4.2 Brand Performance Ratings – Germany, Austria & Switz.

FIGURE 36. BRAND PERFORMANCE RATINGS – GER / AUT / SWI								
Region / Factor	Physical	Product	Brand	Regular	Optical	Advert.	AVERAGE	Sample
	Propert.	Perform.	Reput.	Quality	Appear.	Support		
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
*** (***)	4.7	4.8	4.6	4.9	4.8	4.2	<b>4.68</b>	21
*** (***)	4.9	4.7	4.4	4.9	4.8	3.0	<b>4.55</b>	7
*** (***)	4.6	4.6	4.4	4.8	4.4	3.6	<b>4.46</b>	17
*** (***)	4.7	5.0	3.3	5.0	4.7	3.0	<b>4.38</b>	3
*** (***)	4.6	4.3	4.1	4.9	4.4	3.6	<b>4.36</b>	8
*** (***)	4.4	4.4	3.7	4.9	3.9	3.9	<b>4.24</b>	7
*** (***)	4.3	4.7	3.7	4.3	4.7	3.0	<b>4.18</b>	3
*** (***)	4.0	4.6	4.0	4.4	4.4	3.2	<b>4.16</b>	5
*** (***)	3.0	4.7	4.3	4.7	4.0	3.7	<b>4.09</b>	3
*** (***)	3.8	4.6	3.4	4.8	3.8	3.5	<b>4.06</b>	5
*** (***)	3.8	4.3	4.3	4.3	4.0	3.0	<b>4.05</b>	6
*** (***)	3.8	4.3	4.4	3.9	3.9	3.9	<b>4.04</b>	9
*** (***)	4.0	4.3	4.0	4.5	4.3	3.0	<b>4.03</b>	4
*** (***)	3.8	4.0	4.0	4.3	4.2	3.0	<b>3.97</b>	6
*** (***)	4.0	4.2	3.2	4.6	3.8	3.0	<b>3.88</b>	5
*** (***)	3.6	4.0	3.2	4.4	3.8	4.0	<b>3.86</b>	5
*** (***)	4.0	4.7	2.8	4.3	3.7	2.5	<b>3.84</b>	7
*** (***)	3.3	4.0	3.7	4.3	3.7	3.0	<b>3.75</b>	3
*** (***)	3.8	4.4	3.8	4.1	3.1	2.6	<b>3.70</b>	8
*** (***)	3.3	3.3	2.7	4.3	3.3	2.7	<b>3.35</b>	3
*** (***)	3.3	3.6	3.7	4.3	2.4	2.3	<b>3.34</b>	7
*** (***)	3.7	3.7	2.8	3.7	3.0	2.8	<b>3.33</b>	6
Others								42
<b>Average/Total</b>	<b>4.1</b>	<b>4.4</b>	<b>3.9</b>	<b>4.5</b>	<b>4.0</b>	<b>3.3</b>	<b>4.07</b>	<b>190</b>

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*Brand Performance Rankings – Germany, Austria & Switzerland*

FIGURE 37. BRAND PERFORMANCE RANKINGS – GER / AUT / SWI							
Region / Factor	Physical Propert.	Product Perform.	Brand Reput.	Regular Quality	Optical Appear.	Advert. Support	AVGE.
*** (**) 3	3	2	1	2	2	1	1
*** (**) 1	1	3	3	4	1	10	2
*** (**) 4	4	7	4	7	5	7	3
*** (**) 2	2	1	17	1	3	10	4
*** (**) 5	5	14	7	3	7	6	5
*** (**) 6	6	10	12	4	13	4	6
*** (**) 7	7	5	14	13	3	10	7
*** (**) 8	8	8	8	11	6	9	8
*** (**) 22	22	5	5	8	10	5	9
*** (**) 13	13	8	16	6	14	8	10
*** (**) 12	12	12	5	13	10	10	11
*** (**) 15	15	12	2	21	12	3	12
*** (**) 8	8	15	8	10	8	10	13
*** (**) 13	13	17	8	13	9	10	14
*** (**) 8	8	16	18	9	14	10	15
*** (**) 18	18	17	18	11	14	2	16
*** (**) 8	8	3	20	18	17	21	17
*** (**) 19	19	17	14	13	18	10	18
*** (**) 15	15	11	11	20	20	20	19
*** (**) 19	19	22	22	13	19	19	20
*** (**) 21	21	21	12	18	22	22	21
*** (**) 17	17	20	20	22	21	18	22

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### 4.3 Brand Performance Ratings – UK, Netherlands & Nordic

FIGURE 38. BRAND PERFORMANCE RATINGS – UK / NL / NORD								
Region / Factor	Physical Propert.	Product Perform.	Brand Reput.	Regular Quality	Optical Appear.	Advert. Support	AVERAGE	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
**** (***)	4.5	4.7	4.5	4.6	4.5	3.8	<b>4.47</b>	26
**** (***)	4.4	4.8	4.5	4.6	4.4	3.1	<b>4.39</b>	14
**** (***)	4.4	4.3	4.6	4.5	4.2	4.1	<b>4.36</b>	14
**** (***)	3.7	4.7	5.0	4.7	4.0	3.7	<b>4.32</b>	3
**** (***)	4.3	4.6	4.3	4.7	3.9	3.8	<b>4.31</b>	15
**** (***)	4.5	4.6	3.8	4.8	4.4	3.1	<b>4.27</b>	8
**** (***)	4.3	4.5	4.3	4.5	3.8	4.1	<b>4.25</b>	8
**** (***)	4.3	4.7	3.7	4.7	4.0	3.3	<b>4.18</b>	3
**** (***)	4.0	4.3	4.3	4.7	3.7	3.5	<b>4.18</b>	3
**** (***)	4.0	4.8	4.2	4.4	4.2	1.3	<b>4.15</b>	5
**** (***)	4.7	4.0	4.3	4.7	3.5	2.7	<b>4.12</b>	3
**** (***)	4.1	4.4	4.1	4.4	4.1	2.9	<b>4.09</b>	9
**** (***)	4.0	4.3	3.9	4.4	3.9	3.4	<b>4.04</b>	14
**** (***)	4.0	4.3	3.5	4.5	4.3	3.3	<b>4.03</b>	4
**** (***)	3.3	3.7	3.0	4.0	4.7	3.5	<b>3.78</b>	3
**** (***)	3.9	4.1	3.7	3.9	3.9	2.7	<b>3.75</b>	7
**** (***)	3.6	3.8	3.8	3.6	3.6	3.0	<b>3.60</b>	5
**** (***)	4.3	3.3	3.3	3.3	4.0	1.5	<b>3.49</b>	3
**** (***)	3.3	3.0	2.7	3.3	3.7	3.3	<b>3.22</b>	3
**** (***)	3.5	3.8	2.8	3.3	3.5	1.8	<b>3.17</b>	4
Others								45
<b>Average/Total</b>	<b>4.1</b>	<b>4.3</b>	<b>4.0</b>	<b>4.4</b>	<b>4.1</b>	<b>3.2</b>	<b>4.08</b>	<b>199</b>

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*Brand Performance Rankings – UK, Netherlands & Nordic*

FIGURE 39. BRAND PERFORMANCE RANKINGS – UK / NL / NORD							
Region / Factor	Physical	Product	Brand	Regular	Optical	Advert.	AVGE.
	Propert.	Perform.	Reput.	Quality	Appear.	Support	
**** (**)	2	5	4	7	2	4	1
**** (**)	4	2	3	7	4	13	2
**** (**)	5	11	2	9	6	2	3
**** (**)	16	3	1	2	9	5	4
**** (**)	8	7	5	2	12	3	5
**** (**)	3	6	13	1	3	12	6
**** (**)	9	8	8	9	15	1	7
**** (**)	6	3	15	2	9	9	8
**** (**)	11	10	5	2	16	6	9
**** (**)	11	1	9	14	7	20	10
**** (**)	1	15	5	2	19	17	11
**** (**)	10	9	10	12	8	15	12
**** (**)	11	11	11	13	12	8	13
**** (**)	11	13	16	9	5	9	14
**** (**)	19	18	18	15	1	6	15
**** (**)	15	14	14	16	14	16	16
**** (**)	17	16	12	17	18	14	17
**** (**)	6	19	17	18	9	19	18
**** (**)	19	20	20	18	16	9	19
**** (**)	18	17	19	20	19	18	20

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#### 4.4 Brand Performance Ratings – France, Belgium & Lux.

FIGURE 40. BRAND PERFORMANCE RATINGS – FRA / BEL / LUX								
Region / Factor	Physical Propert.	Product Perform.	Brand Reput.	Regular Quality	Optical Appear.	Advert. Support	AVERAGE	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
**** (***)	5.0	5.0	4.8	4.8	4.8	2.8	<b>4.60</b>	4
**** (***)	5.0	4.7	4.0	5.0	5.0	3.3	<b>4.58</b>	6
**** (***)	4.7	5.0	4.2	4.7	4.4	3.5	<b>4.49</b>	6
**** (***)	4.6	4.7	4.2	4.7	4.6	3.5	<b>4.45</b>	18
**** (***)	4.7	4.6	4.4	4.7	4.4	3.4	<b>4.44</b>	7
**** (***)	4.4	4.4	4.5	4.5	4.6	3.1	<b>4.26</b>	20
**** (***)	4.5	4.6	4.1	4.5	4.4	2.5	<b>4.22</b>	8
**** (***)	4.5	5.0	3.5	5.0	4.0	2.0	<b>4.17</b>	2
**** (***)	4.2	4.3	3.7	4.2	4.4	3.3	<b>4.09</b>	13
**** (***)	4.2	4.2	4.2	4.8	3.8	2.8	<b>4.08</b>	5
**** (***)	4.3	4.4	3.7	4.0	4.6	3.6	<b>4.01</b>	7
**** (***)	4.0	4.0	4.0	5.0	4.0	2.5	<b>3.97</b>	2
**** (***)	3.5	4.5	4.0	4.5	3.5	3.5	<b>3.97</b>	2
**** (***)	5.0	4.5	2.5	4.5	4.5	1.5	<b>3.94</b>	2
**** (***)	4.0	4.0	4.0	4.0	4.0	3.0	<b>3.94</b>	2
**** (***)	3.6	4.3	4.0	4.3	3.9	3.0	<b>3.90</b>	8
**** (***)	3.8	4.1	3.7	4.2	3.4	3.8	<b>3.88</b>	10
**** (***)	4.0	4.5	4.0	3.5	4.0	2.5	<b>3.83</b>	2
**** (***)	4.0	3.3	3.7	4.3	3.3	3.0	<b>3.65</b>	3
**** (***)	4.0	3.5	4.0	4.0	3.5	2.5	<b>3.64</b>	2
**** (***)	4.0	4.0	3.7	4.3	3.3	1.7	<b>3.60</b>	3
Others								21
<b>Average/Total</b>	<b>4.2</b>	<b>4.3</b>	<b>4.0</b>	<b>4.4</b>	<b>4.2</b>	<b>3.1</b>	<b>4.10</b>	<b>153</b>

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*Brand Performance Rankings – France, Belgium & Luxembourg*

FIGURE 41. BRAND PERFORMANCE RANKINGS – FRA / BEL / LUX							
Region / Factor	Physical	Product	Brand	Regular	Optical	Advert.	AVGE.
	Propert.	Perform.	Reput.	Quality	Appear.	Support	
*** (**)	1	1	1	5	2	14	1
*** (**)	1	4	8	1	1	7	2
*** (**)	5	1	5	7	8	4	3
*** (**)	6	4	5	7	3	3	4
*** (**)	4	7	3	6	7	6	5
*** (**)	9	12	2	9	5	9	6
*** (**)	7	6	7	9	10	15	7
*** (**)	7	1	20	1	11	19	8
*** (**)	11	13	17	16	9	8	9
*** (**)	12	15	4	4	16	13	10
*** (**)	10	11	15	18	4	2	11
*** (**)	13	17	8	1	11	15	12
*** (**)	21	8	8	9	17	4	13
*** (**)	1	8	21	9	6	21	14
*** (**)	13	17	8	18	11	10	15
*** (**)	20	14	8	15	15	10	16
*** (**)	19	16	16	17	19	1	17
*** (**)	13	8	8	21	11	15	18
*** (**)	13	21	18	13	20	10	19
*** (**)	13	20	8	18	17	15	20
*** (**)	13	17	18	13	20	20	21

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## 4.5 Brand Performance Ratings – Italy, Portugal &amp; Spain

FIGURE 42. BRAND PERFORMANCE RATINGS – ITA / POR / SPA								
Region / Factor	Physical	Product	Brand	Regular	Optical	Advert.	AVERAGE	Sample
	Propert.	Perform.	Reput.	Quality	Appear.	Support		
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
*** (***)	4.8	4.8	4.7	4.8	4.7	4.0	<b>4.66</b>	34
*** (***)	4.5	4.7	4.4	4.7	4.4	4.0	<b>4.48</b>	10
*** (***)	4.5	4.8	3.8	5.0	4.5	3.5	<b>4.39</b>	4
*** (***)	4.4	4.8	4.5	4.5	4.2	3.7	<b>4.39</b>	6
*** (***)	3.7	4.3	4.7	5.0	4.7	3.7	<b>4.37</b>	3
*** (***)	4.0	4.7	4.3	4.3	4.7	3.3	<b>4.27</b>	3
*** (***)	4.5	4.5	4.2	4.5	4.3	3.3	<b>4.26</b>	11
*** (***)	4.3	4.8	4.3	4.3	4.2	3.2	<b>4.24</b>	6
*** (***)	4.2	4.4	4.2	4.6	4.4	3.4	<b>4.24</b>	5
*** (***)	4.5	5.0	2.0	4.5	4.5	1.0	<b>4.24</b>	2
*** (***)	5.0	5.0	4.5	4.5	4.0	1.5	<b>4.21</b>	2
*** (***)	4.4	4.6	4.0	4.0	4.4	3.6	<b>4.20</b>	5
*** (***)	4.0	4.5	4.0	4.0	4.0	4.0	<b>4.13</b>	2
*** (***)	4.4	4.2	3.8	4.4	4.4	2.4	<b>4.01</b>	5
*** (***)	4.3	4.5	3.8	3.8	4.3	3.0	<b>3.97</b>	4
*** (***)	5.0	4.0	3.5	4.5	4.0	2.5	<b>3.83</b>	2
*** (***)	3.7	3.8	3.7	4.0	3.6	3.1	<b>3.69</b>	11
*** (***)	4.0	4.0	3.6	4.0	3.8	2.2	<b>3.67</b>	5
*** (***)	3.8	3.8	3.4	4.0	3.4	3.0	<b>3.60</b>	5
*** (***)	3.0	3.5	3.5	3.5	3.0	3.0	<b>3.27</b>	2
*** (***)	3.0	3.5	2.5	3.5	3.5	2.0	<b>3.11</b>	2
*** (***)	3.3	3.0	2.8	3.0	3.0	1.3	<b>2.78</b>	4
Others								29
<b>Average/Total</b>	<b>4.3</b>	<b>4.4</b>	<b>4.0</b>	<b>4.3</b>	<b>4.2</b>	<b>3.2</b>	<b>4.11</b>	<b>162</b>

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*Brand Performance Rankings – Italy, Portugal & Spain*

FIGURE 43. BRAND PERFORMANCE RANKINGS – ITA / POR / SPA							
Region / Factor	Physical	Product	Brand	Regular	Optical	Advert.	AVGE.
	Propert.	Perform.	Reput.	Quality	Appear.	Support	
*** (**)	3	5	1	3	1	1	1
*** (**)	5	7	5	4	6	1	2
*** (**)	5	6	13	1	4	7	3
*** (**)	8	3	3	6	13	4	4
*** (**)	19	14	2	1	2	4	5
*** (**)	14	8	6	12	2	9	6
*** (**)	4	10	9	10	10	10	7
*** (**)	11	3	6	12	12	11	8
*** (**)	13	13	8	5	6	8	9
*** (**)	5	1	22	6	4	22	10
*** (**)	1	1	3	6	14	20	11
*** (**)	8	9	10	14	6	6	12
*** (**)	14	11	10	14	14	1	13
*** (**)	8	15	12	11	6	17	14
*** (**)	12	11	13	19	11	13	15
*** (**)	1	16	17	6	14	16	16
*** (**)	18	18	15	14	18	12	17
*** (**)	14	16	16	14	17	18	18
*** (**)	17	19	19	14	20	13	19
*** (**)	21	20	17	20	21	13	20
*** (**)	21	20	21	20	19	19	21
*** (**)	20	22	20	22	21	21	22

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#### 4.6 Brand Performance Ratings – Russia

**FIGURE 44. BRAND PERFORMANCE RATINGS – RUSSIA**

<b>Region / Factor</b>	<b>Physical Propert.</b>	<b>Product Perform.</b>	<b>Brand Reput.</b>	<b>Regular Quality</b>	<b>Optical Appear.</b>	<b>Advert. Support</b>	<b>AVERAGE</b>	<b>Sample</b>
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
**** (***)	4.7	4.7	4.6	4.9	4.7	4.8	<b>4.71</b>	7
**** (***)	4.6	4.6	4.5	4.8	4.7	4.1	<b>4.55</b>	21
**** (***)	4.6	4.5	4.6	4.5	4.6	3.6	<b>4.43</b>	8
**** (***)	5.0	4.7	4.8	4.8	4.2	2.5	<b>4.41</b>	6
**** (***)	4.7	4.7	4.7	4.7	4.7	2.7	<b>4.41</b>	3
**** (***)	4.6	4.7	4.5	4.7	4.8	2.4	<b>4.37</b>	6
**** (***)	4.4	4.5	4.3	4.5	4.4	3.5	<b>4.30</b>	17
**** (***)	4.2	4.4	4.0	4.8	4.4	3.4	<b>4.25</b>	5
**** (***)	4.2	4.3	4.3	4.4	4.3	3.8	<b>4.24</b>	25
**** (***)	5.0	4.0	5.0	4.0	4.0	3.0	<b>4.19</b>	2
**** (***)	4.0	4.3	4.4	4.2	4.2	3.6	<b>4.13</b>	23
**** (***)	4.3	4.0	4.0	3.7	4.3	2.3	<b>3.84</b>	3
**** (***)	3.3	3.7	3.5	3.5	3.3	1.7	<b>3.18</b>	4
Others								12
<b>Average/Total</b>	<b>4.4</b>	<b>4.4</b>	<b>4.4</b>	<b>4.5</b>	<b>4.4</b>	<b>3.5</b>	<b>4.28</b>	<b>142</b>

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*Brand Performance Rankings – Russia*

FIGURE 45. BRAND PERFORMANCE RANKINGS – RUSSIA							
Region / Factor	Physical	Product	Brand	Regular	Optical	Advert.	AVGE.
	Propert.	Perform.	Reput.	Quality	Appear.	Support	
*** (**)	3	1	4	1	2	1	1
*** (**)	6	5	7	4	4	2	2
*** (**)	5	6	4	7	5	4	3
*** (**)	1	2	2	2	11	10	4
*** (**)	4	2	3	5	3	9	5
*** (**)	6	2	6	5	1	11	6
*** (**)	8	7	10	8	6	6	7
*** (**)	11	8	11	3	7	7	8
*** (**)	10	9	9	9	9	3	9
*** (**)	1	11	1	11	12	8	10
*** (**)	12	10	8	10	10	4	11
*** (**)	9	11	11	12	8	12	12
*** (**)	13	13	13	13	13	13	13

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### 4.7 Brand Performance Ratings – Poland & Baltics

FIGURE 46. BRAND PERFORMANCE RATINGS – Poland / BALTICS								
Region / Factor	Physical Propert.	Product Perform.	Brand Reput.	Regular Quality	Optical Appear.	Advert. Support	AVERAGE	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
**** (***)	4.8	4.8	4.6	4.8	4.8	4.5	<b>4.73</b>	14
**** (***)	4.8	4.8	4.6	4.8	4.7	3.6	<b>4.58</b>	8
**** (***)	5.0	5.0	5.0	4.7	5.0	1.5	<b>4.55</b>	3
**** (***)	4.5	5.0	4.5	5.0	4.5	3.5	<b>4.54</b>	4
**** (***)	4.3	4.7	4.5	4.5	4.4	4.0	<b>4.44</b>	13
**** (***)	4.8	4.8	4.4	4.4	5.0	2.2	<b>4.33</b>	5
**** (***)	4.5	4.0	4.5	4.5	4.0	4.5	<b>4.32</b>	2
**** (***)	4.5	4.6	4.6	4.6	4.6	2.3	<b>4.32</b>	8
**** (***)	4.3	4.3	4.3	4.3	4.3	4.7	<b>4.25</b>	4
**** (***)	4.3	4.3	4.0	4.4	4.4	3.9	<b>4.25</b>	8
**** (***)	4.0	4.5	4.5	4.5	5.0	2.5	<b>4.22</b>	2
**** (***)	4.3	4.3	4.5	4.2	4.1	3.8	<b>4.19</b>	22
**** (***)	4.2	4.3	4.2	4.5	3.7	3.2	<b>4.01</b>	6
**** (***)	4.0	4.2	3.8	4.4	3.9	3.1	<b>3.96</b>	9
**** (***)	4.3	4.3	3.8	4.3	4.3	2.8	<b>3.94</b>	4
**** (***)	3.8	4.0	3.5	4.0	4.0	3.0	<b>3.81</b>	4
**** (***)	4.0	4.0	3.6	4.0	3.9	2.9	<b>3.78</b>	8
**** (***)	3.5	4.3	4.0	4.0	3.5	2.3	<b>3.70</b>	4
**** (***)	3.6	4.0	3.3	3.8	3.3	3.2	<b>3.58</b>	6
**** (***)	3.0	3.0	2.5	3.0	3.0	1.5	<b>2.71</b>	2
Others								20
<b>Average/Total</b>	<b>4.2</b>	<b>4.4</b>	<b>4.1</b>	<b>4.3</b>	<b>4.2</b>	<b>3.3</b>	<b>4.13</b>	<b>156</b>

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*Brand Performance Rankings – Poland & Baltics*

FIGURE 47. BRAND PERFORMANCE RANKINGS – Poland / BALTICS							
Region / Factor	Physical Propert.	Product Perform.	Brand Reput.	Regular Quality	Optical Appear.	Advert. Support	AVGE.
**** (***)	2	4	2	2	4	3	1
**** (***)	4	5	3	3	5	7	2
**** (***)	1	1	1	4	1	19	3
**** (***)	5	1	6	1	7	8	4
**** (***)	8	6	5	6	8	4	5
**** (***)	3	3	10	11	1	18	6
**** (***)	5	16	6	6	13	2	7
**** (***)	5	7	3	5	6	17	8
**** (***)	11	12	11	13	11	1	9
**** (***)	9	11	13	12	9	5	10
**** (***)	14	8	6	6	1	15	11
**** (***)	10	9	9	15	12	6	12
**** (***)	13	9	12	6	17	9	13
**** (***)	14	15	15	10	15	11	14
**** (***)	11	12	16	13	10	14	15
**** (***)	17	16	18	16	13	12	16
**** (***)	14	16	17	16	16	13	17
**** (***)	19	12	13	16	18	16	18
**** (***)	18	16	19	19	19	9	19
**** (***)	20	20	20	20	20	19	20

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## 4.8 Brand Performance Ratings – Bg, Cz, Hu &amp; Sk.

FIGURE 48. BRAND PERFORMANCE RATINGS – BG / CZ / HU / SK								
Region / Factor	Physical	Product	Brand	Regular	Optical	Advert.	AVERAGE	Sample
	Propert.	Perform.	Reput.	Quality	Appear.	Support		
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
*** (***)	4.5	5.0	5.0	5.0	4.5	4.5	<b>4.77</b>	2
*** (***)	4.3	4.7	4.7	5.0	4.3	3.3	<b>4.46</b>	3
*** (***)	4.5	5.0	5.0	4.5	4.0	3.5	<b>4.46</b>	2
*** (***)	4.6	4.6	4.8	4.4	4.2	3.2	<b>4.35</b>	5
*** (***)	4.4	4.6	4.2	4.6	4.4	3.3	<b>4.32</b>	14
*** (***)	3.5	5.0	4.5	5.0	5.0	2.5	<b>4.24</b>	2
*** (***)	4.2	4.3	4.6	4.3	4.3	3.6	<b>4.23</b>	19
*** (***)	4.5	4.8	3.9	4.5	4.4	2.6	<b>4.21</b>	8
*** (***)	4.2	4.4	3.8	4.5	4.3	3.4	<b>4.17</b>	13
*** (***)	4.1	4.3	4.3	4.5	4.3	3.3	<b>4.16</b>	26
*** (***)	4.0	5.0	3.0	4.5	4.0	3.0	<b>4.04</b>	2
*** (***)	3.9	4.2	4.3	4.7	4.1	3.1	<b>4.02</b>	10
*** (***)	4.0	4.7	2.3	4.3	4.3	2.3	<b>3.82</b>	3
*** (***)	3.7	4.0	3.6	4.3	3.7	3.2	<b>3.81</b>	11
*** (***)	1.0	2.5	1.5	2.5	3.0	1.0	<b>2.02</b>	2
Others								23
<b>Average/Total</b>	<b>4.1</b>	<b>4.4</b>	<b>4.0</b>	<b>4.5</b>	<b>4.2</b>	<b>3.2</b>	<b>4.12</b>	<b>145</b>

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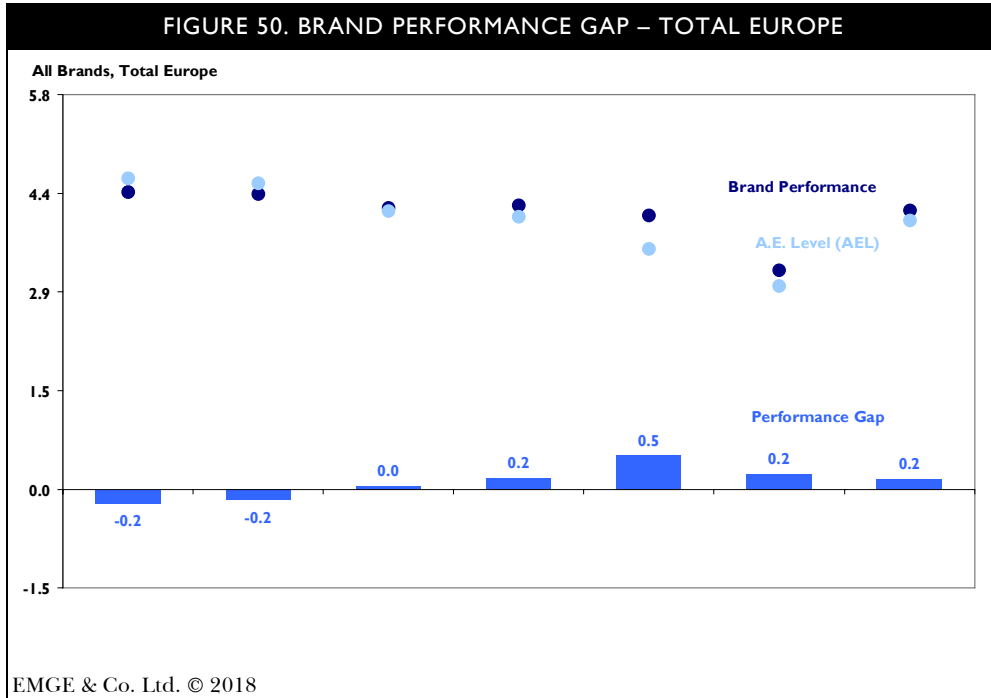
*Brand Performance Rankings – Bulgaria, Czech, Hungary & Sk.*

FIGURE 49. BRAND PERFORMANCE RANKINGS – BG / CZ / HU / SK							
Region / Factor	Physical Propert.	Product Perform.	Brand Reput.	Regular Quality	Optical Appear.	Advert. Support	AVGE.
*** (**)	2	1	1	1	2	1	1
*** (**)	6	6	4	1	5	5	2
*** (**)	2	1	1	7	12	3	3
*** (**)	1	9	3	11	10	8	4
*** (**)	5	8	9	5	4	6	5
*** (**)	14	1	6	1	1	13	6
*** (**)	7	11	5	13	9	2	7
*** (**)	2	5	10	7	3	12	8
*** (**)	8	10	11	6	7	4	9
*** (**)	9	12	8	10	8	7	10
*** (**)	10	1	13	7	12	11	11
*** (**)	12	13	7	4	11	10	12
*** (**)	10	6	14	12	5	14	13
*** (**)	13	14	12	14	14	9	14
*** (**)	15	15	15	15	15	15	15

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# 5 Brand Performance Gap



Brands have succeeded in achieving the overall expectation level of respondents, but not in terms of xxxx and xxxx.

The chart above compares the Average Expectation Level (in descending order of importance) against the overall Brand Performance average, in order to identify the Brand Performance Gap across each factor.

A negative gap shows that, on average, brands have failed to meet the Average Expectation Level (AEL) for a given factor, while a positive gap shows that, on average, brands have exceeded the AEL.

The overall performance of brands exceeded the Average Expectation Level of respondents, particularly in terms of xxxx and to a lesser extent xxxx, xxxx and xxxx.

However, the brands fell short in terms of xxxx and xxxx; the two most important mill factors according to survey respondents.



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## 6 Mill Distribution

Which mills **SUPPLY** cutsize office paper to your office?

### 6.1 Mill Distribution – Total Europe

FIGURE 51. MILL DISTRIBUTION – TOTAL EUROPE				
	<b>Mill</b>	<b>Major Supplier</b>	<b>Minor Supplier</b>	<b>Total</b>
1	***	37%	20%	57%
2	***	41%	14%	56%
3	***	35%	18%	53%
4	***	19%	22%	41%
5	***	20%	19%	40%
6	***	18%	16%	34%
7	***	12%	17%	29%
8	***	6%	21%	27%
9	***	7%	19%	25%
10	***	10%	15%	25%
11	***	7%	11%	17%
12	***	5%	10%	15%
13	***	5%	10%	15%
14	***	4%	9%	13%
15	***	3%	8%	11%
16	***	2%	0%	2%
17	***	1%	0%	1%
18	***	1%	0%	1%
19	***	1%	0%	1%
20	***	0%	0%	1%

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## 6.2 Mill Distribution – Germany, Austria & Switzerland

FIGURE 52. MILL DISTRIBUTION – GER / AUT / SWI				
Mill		Major Supplier	Minor Supplier	Total
1	***	65%	22%	86%
2	***	51%	20%	71%
3	***	29%	39%	69%
4	***	39%	24%	63%
5	***	37%	22%	59%
6	***	27%	29%	57%
7	***	35%	12%	47%
8	***	10%	31%	41%
9	***	8%	31%	39%
10	***	12%	22%	33%
11	***	8%	22%	29%
12	***	2%	25%	27%
13	***	2%	12%	14%
14	***	2%	12%	14%
15	***	4%	6%	10%

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### 6.3 Mill Distribution – UK, Netherlands & Nordic

FIGURE 53. MILL DISTRIBUTION – UK / NL / NORD				
Mill		Major Supplier	Minor Supplier	Total
1	***	56%	15%	70%
2	***	54%	17%	70%
3	***	43%	19%	61%
4	***	22%	33%	56%
5	***	22%	33%	56%
6	***	24%	30%	54%
7	***	7%	37%	44%
8	***	17%	20%	37%
9	***	6%	28%	33%
10	***	17%	17%	33%
11	***	7%	22%	30%
12	***	13%	11%	24%
13	***	11%	9%	20%
14	***	11%	7%	19%
15	***	2%	11%	13%
16	***	2%	0%	2%
17	***	2%	0%	2%
18	***	2%	0%	2%
19	***	2%	0%	2%
20	***	0%	2%	2%

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### 6.4 Mill Distribution – France, Belgium & Luxembourg

FIGURE 54. MILL DISTRIBUTION – FRA / BEL / LUX				
Mill		Major Supplier	Minor Supplier	Total
1	***	61%	26%	87%
2	***	52%	15%	67%
3	***	46%	11%	57%
4	***	24%	30%	54%
5	***	30%	17%	48%
6	***	20%	24%	43%
7	***	17%	26%	43%
8	***	28%	9%	37%
9	***	11%	22%	33%
10	***	2%	24%	26%
11	***	15%	9%	24%
12	***	13%	11%	24%
13	***	9%	13%	22%
14	***	4%	15%	20%
15	***	2%	13%	15%

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### 6.5 Mill Distribution –Italy, Portugal & Spain

FIGURE 55. MILL DISTRIBUTION – ITA / POR / SPA				
Mill		Major Supplier	Minor Supplier	Total
1	***	73%	14%	88%
2	***	14%	37%	51%
3	***	35%	14%	49%
4	***	12%	35%	47%
5	***	12%	27%	39%
6	***	16%	20%	37%
7	***	8%	29%	37%
8	***	8%	22%	31%
9	***	8%	18%	27%
10	***	8%	16%	24%
11	***	2%	22%	24%
12	***	4%	14%	18%
13	***	2%	16%	18%
14	***	12%	2%	14%
15	***	2%	8%	10%
16	***	6%	2%	8%
17	***	2%	6%	8%
18	***	2%	0%	2%
19	***	0%	2%	2%

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### 6.6 Mill Distribution – Russia

FIGURE 56. MILL DISTRIBUTION – RUSSIA				
	<b>Mill</b>	<b>Major Supplier</b>	<b>Minor Supplier</b>	<b>Total</b>
1	***	32%	10%	41%
2	***	27%	12%	39%
3	***	20%	12%	32%
4	***	7%	12%	20%
5	***	10%	7%	17%
6	***	2%	10%	12%
7	***	0%	7%	7%
8	***	5%	0%	5%
9	***	5%	0%	5%
10	***	0%	2%	2%
11	***	0%	2%	2%
12	***	0%	2%	2%
13	***	0%	2%	2%

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### 6.7 Mill Distribution – Poland & Baltics

FIGURE 57. MILL DISTRIBUTION – Poland / BALTICS				
Mill		Major Supplier	Minor Supplier	Total
1	***	39%	20%	59%
2	***	35%	24%	59%
3	***	33%	22%	54%
4	***	13%	37%	50%
5	***	20%	13%	33%
6	***	2%	15%	17%
7	***	9%	4%	13%
8	***	0%	11%	11%
9	***	7%	2%	9%
10	***	0%	7%	7%
11	***	0%	4%	4%
12	***	0%	2%	2%
13	***	0%	2%	2%

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### 6.8 Mill Distribution –Bulgaria, Czech, Hungary & Sk.

**FIGURE 58. MILL DISTRIBUTION – BG / CZ / HU / SK**

<b>Mill</b>	<b>Major Supplier</b>	<b>Minor Supplier</b>	<b>Total</b>
1 ***	41%	17%	59%
2 ***	20%	17%	37%
3 ***	15%	15%	30%
4 ***	9%	11%	20%
5 ***	9%	9%	17%
6 ***	0%	15%	15%
7 ***	4%	9%	13%
8 ***	2%	7%	9%
9 ***	2%	4%	7%
10 ***	2%	4%	7%
11 ***	0%	4%	4%
12 ***	2%	0%	2%
13 ***	0%	2%	2%
14 ***	0%	2%	2%
15 ***	0%	2%	2%

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# 7 Mill Importance

Which **THREE** criteria are most important when choosing a **MILL**?

**FIGURE 59. TOP 3 MILL IMPORTANCE FACTORS**

<b>Region</b>	<b>1st</b>	<b>2nd</b>	<b>3rd</b>
GER / AUT / SWI	*****	*****	*****
UK / NL / NORD	*****	*****	*****
FRA / BEL / LUX	*****	*****	*****
ITA / POR / SPA	*****	*****	*****
<b>WEST EUROPE</b>	*****	*****	*****
RUSSIA	*****	*****	*****
POL / BAL	*****	*****	*****
BG / CZ / HU / SK	*****	*****	*****
<b>EAST EUROPE</b>	*****	*****	*****
<b>TOTAL EUROPE</b>	*****	*****	*****

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\*\*\*\*\* was the most mentioned mill importance factor, followed by \*\*\*\*\* and \*\*\*\*\*.

The above table highlights the three most commonly mentioned factors when choosing a supplier of Cutsized paper.

In **West Europe**, \*\*\*\*\* was the most mentioned mill importance factor, followed by \*\*\*\*\* and \*\*\*\*\*.

In comparison, \*\*\*\*\* was the most mentioned mill importance factor in **East Europe**, ahead of \*\*\*\*\*.

In both regions, \*\*\*\*\* was the 3<sup>rd</sup> most mentioned mill importance factor.

Other factors mentioned as being important when choosing a supplier of Cutsized paper include:

- \*\*\*\*\*
- \*\*\*\*\*
- \*\*\*\*\*

How **IMPORTANT** do you consider the following factors to be when choosing a **MILL**?

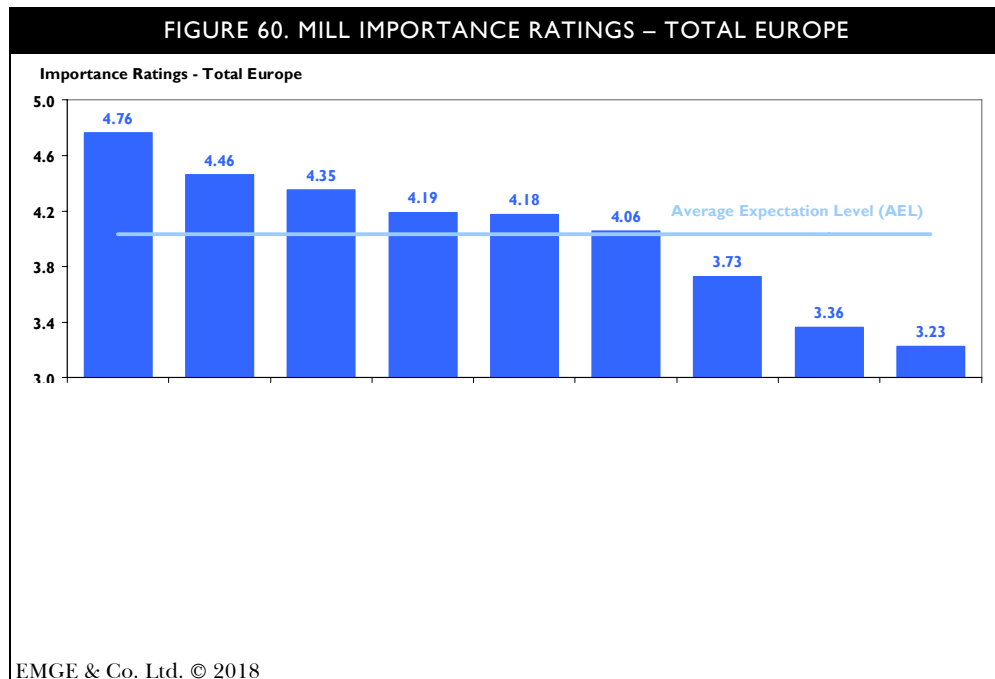
Scale: 1 = unimportant, 5 = very important

*The following factors were covered:*

- ACCOUNT MANAGEMENT / OVERALL CUSTOMER SERVICE
- FLEXIBILITY OF PRICING / REACTION TO PRICE MOVEMENTS
- PACKAGING ALTERNATIVES (availability of)
- SHORT LEAD TIMES
- RELIABILITY OF DELIVERY (meeting delivery deadline)
- DEPTH OF PRODUCT RANGE
- INNOVATIVE MARKETING Approaches (e.g. creative promotions, communication, initiatives, etc.)
- SUSTAINABILITY Policy
- FINANCIAL POSITION OF MILL / SECURITY OF FIBRE SUPPLY

**Average** is the arithmetic average of the individual ratings.

The above chart shows the Mill Importance factor ratings derived from the survey this year.



*Mill Importance Ratings*

FIGURE 61. MILL IMPORTANCE RATINGS - BY REGION

<i>Region / Factor</i>	<i>Account Mgt. / Customer Service</i>	<i>Flexibility of / Reaction to Price</i>	<i>Pack-aging Alternatives</i>	<i>Short Lead Times</i>	<i>Reliability of Delivery</i>	<i>Depth of Product Range</i>	<i>Innov. Marketing Approaches</i>	<i>Sustain-ability Policy</i>	<i>Financial Mill Position / Security of Fibre Supply</i>	<i>Average</i>	<i>Sample</i>
GER/AUT/SWI	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	xx
UK/NL/NORD	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	xx
FRA/BEL/LUX	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	xx
ITA/POR/SPA	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	xx
<b>W.EUROPE</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>xx</b>
RUSSIA	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	xx
POL/BAL	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	xx
BG/CZ/HU/SK	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.x	x.xx	xx
<b>E.EUROPE</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>xx</b>
<b>TOTAL EUROPE</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>xx</b>

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*Mill Importance Rankings*

FIGURE 62. MILL IMPORTANCE RANKINGS - BY REGION

<i>Region / Factor</i>	<i>Account Mgt. / Customer Service</i>	<i>Flexibility of / Reaction to Price</i>	<i>Pack-aging Alternatives</i>	<i>Short Lead Times</i>	<i>Reliability of Delivery</i>	<i>Depth of Product Range</i>	<i>Innov. Marketing Approaches</i>	<i>Sustain-ability Policy</i>	<i>Financial Mill Position / Security of Fibre Supply</i>
GER / AUT / SWI	6	2	9	3	1	7	8	4	5
UK / NL / NORD	5	2	9	6	1	7	8	4	3
FRA / BEL / LUX	4	3	9	2	1	7	8	6	5
ITA / POR / SPA	6	3	9	2	1	7	8	5	4
<b>W.EUROPE</b>	<b>6</b>	<b>2</b>	<b>9</b>	<b>3</b>	<b>1</b>	<b>7</b>	<b>8</b>	<b>5</b>	<b>4</b>
RUSSIA	4	1	9	3	2	6	8	7	5
POL / BAL	4	2	9	3	1	7	8	6	5
BG / CZ / HU / SK	2	3	8	3	1	6	9	7	5
<b>E.EUROPE</b>	<b>4</b>	<b>2</b>	<b>9</b>	<b>3</b>	<b>1</b>	<b>6</b>	<b>8</b>	<b>7</b>	<b>5</b>
<b>TOTAL EUROPE</b>	<b>4</b>	<b>2</b>	<b>9</b>	<b>3</b>	<b>1</b>	<b>7</b>	<b>8</b>	<b>6</b>	<b>5</b>

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## 8 Mill Performance

How do you rate the **PERFORMANCE** of each **MILL** for each of the following factors?

Scale: 1 = poor, 5 = very good

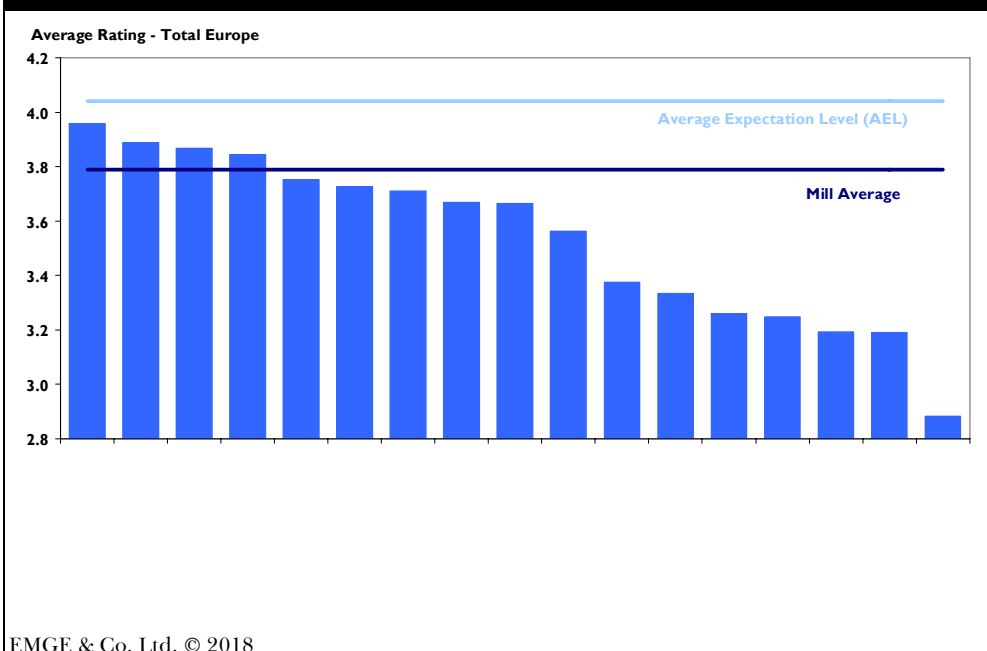
*The following factors were covered:*

- ACCOUNT MANAGEMENT / OVERALL CUSTOMER SERVICE
- FLEXIBILITY OF PRICING / REACTION TO PRICE MOVEMENTS
- PACKAGING ALTERNATIVES (availability of)
- SHORT LEAD TIMES
- RELIABILITY OF DELIVERY (meeting delivery deadline)
- DEPTH OF PRODUCT RANGE
- INNOVATIVE MARKETING Approaches (e.g. creative promotions, communication, initiatives, etc.)
- SUSTAINABILITY Policy
- FINANCIAL POSITION OF MILL / SECURITY OF FIBRE SUPPLY

**Average** is the average of the individual ratings, weighted by the “Mill Importance” rating for that factor in the country.

**NOTE:** Results based on small sample sizes may have little statistical significance.

FIGURE 63. MILL PERFORMANCE RATINGS – TOTAL EUROPE



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## 8.1 Mill Performance Ratings – Total Europe

FIGURE 64. MILL PERFORMANCE RATINGS – TOTAL EUROPE											
Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
***	3.9	3.3	3.8	3.8	4.2	4.3	3.7	4.1	4.4	<b>3.96</b>	125
***	3.9	3.5	3.7	3.6	4.0	4.0	3.5	4.1	4.6	<b>3.89</b>	119
***	3.9	3.4	3.6	3.7	4.2	3.6	3.3	4.2	4.5	<b>3.87</b>	70
***	3.9	3.4	3.7	3.7	4.3	3.9	3.0	4.2	4.4	<b>3.84</b>	67
***	3.9	3.2	3.5	3.2	3.7	3.9	3.8	4.2	4.4	<b>3.75</b>	136
***	4.0	3.5	3.2	3.5	4.2	3.7	3.2	4.1	3.8	<b>3.73</b>	26
***	3.7	3.6	3.3	3.4	3.9	3.4	3.0	4.4	4.0	<b>3.71</b>	38
***	3.8	3.8	3.1	3.9	4.1	3.8	2.7	3.6	3.8	<b>3.67</b>	21
***	3.6	2.9	3.3	3.8	4.0	4.0	3.0	3.9	4.2	<b>3.66</b>	73
***	3.7	3.4	3.1	3.4	3.7	3.9	3.4	3.8	3.7	<b>3.56</b>	35
***	3.3	3.2	3.3	2.6	3.9	3.6	2.6	3.5	4.1	<b>3.37</b>	18
***	3.4	3.1	2.5	3.1	3.6	2.9	2.5	3.9	4.1	<b>3.33</b>	20
***	3.8	2.9	2.6	2.4	3.4	2.9	2.3	4.0	4.4	<b>3.26</b>	9
***	3.2	2.9	3.1	3.3	3.4	3.1	3.2	3.5	3.5	<b>3.25</b>	34
***	3.3	3.3	2.8	3.3	3.8	2.8	2.8	3.3	3.3	<b>3.19</b>	4
***	3.7	4.0	3.3	3.6	3.3	2.4	1.9	2.8	3.4	<b>3.19</b>	7
***	2.4	2.7	3.0	2.6	3.1	2.9	2.1	3.1	3.7	<b>2.88</b>	7
OTHERS											109
<b>Grand Total</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>918</b>

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*Mill Performance Rankings – Total Europe*

FIGURE 65. MILL PERFORMANCE RANKINGS – TOTAL EUROPE										
Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average
***	2	9	1	3	3	1	2	5	6	1
***	4	5	3	6	7	2	3	7	1	2
***	3	7	4	4	2	10	5	2	2	3
***	6	6	2	5	1	6	8	4	5	4
***	5	12	5	13	12	4	1	3	4	5
***	1	4	10	8	4	8	7	6	12	6
***	9	3	8	9	8	11	9	1	10	7
***	8	2	11	1	5	7	12	12	11	8
***	12	14	6	2	6	3	10	9	7	9
***	11	8	12	10	11	5	4	11	14	10
***	14	11	9	15	9	9	13	13	9	11
***	13	13	17	14	13	13	14	10	8	12
***	7	16	16	17	14	14	15	8	3	13
***	16	15	13	12	15	12	6	14	15	14
***	15	10	15	11	10	16	11	15	17	15
***	10	1	7	7	16	17	17	17	16	16
***	17	17	14	16	17	15	16	16	13	17

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## 8.2 Mill Performance Ratings – Germany, Austria & Switzerland

FIGURE 66. MILL PERFORMANCE RATINGS – GER / AUT / SWI											
Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging / Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
***	3.8	3.8	3.3	3.5	4.1	3.6	3.3	4.4	4.2	<b>3.82</b>	17
***	3.8	3.5	3.9	3.4	3.9	3.9	3.3	3.9	4.9	<b>3.81</b>	17
***	3.8	3.0	3.5	3.6	4.2	4.2	3.8	4.1	4.2	<b>3.81</b>	34
***	3.6	3.1	3.5	3.8	4.3	3.8	2.9	4.0	4.5	<b>3.76</b>	16
***	4.0	3.2	3.5	2.8	3.6	3.7	4.0	4.1	4.6	<b>3.67</b>	22
***	4.0	3.4	3.3	3.5	3.8	3.0	2.9	3.7	4.4	<b>3.57</b>	11
***	4.3	3.5	3.0	3.3	4.8	3.8	2.5	3.7	3.5	<b>3.56</b>	4
***	3.4	2.8	3.2	3.8	3.9	4.1	2.7	3.8	4.2	<b>3.56</b>	18
***	3.4	3.4	2.7	3.5	3.7	3.4	3.6	3.6	3.6	<b>3.45</b>	8
***	3.1	2.9	3.1	3.6	3.8	3.0	3.2	3.8	3.2	<b>3.27</b>	9
OTHERS											20
<b>Grand Total</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>176</b>

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*Mill Performance Rankings – Germany, Austria & Switzerland*

**FIGURE 67. MILL PERFORMANCE RANKINGS – GER / AUT / SWI**

<b>Region / Factor</b>	<b>Account Mgt. / Customer Service</b>	<b>Flexibility of / Reaction to Price</b>	<b>Pack-aging Alternatives</b>	<b>Short Lead Times</b>	<b>Reliability of Delivery</b>	<b>Depth of Product Range</b>	<b>Innov. Marketing Approaches</b>	<b>Sustain-ability Policy</b>	<b>Financial Mill Position / Security of Fibre Supply</b>	<b>Average</b>
***	4	1	5	6	4	7	5	1	5	1
***	6	2	1	8	6	3	4	5	1	2
***	5	8	2	3	3	1	2	3	6	3
***	7	7	4	1	2	4	7	4	3	4
***	3	6	3	10	10	6	1	2	2	5
***	2	5	6	5	7	9	8	8	4	6
***	1	3	9	9	1	5	10	9	9	7
***	8	10	7	2	5	2	9	6	7	8
***	9	4	10	7	9	8	3	10	8	9
***	10	9	8	4	8	9	6	7	10	10

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### 8.3 Mill Performance Ratings – UK, Netherlands & Nordic

FIGURE 68. MILL PERFORMANCE RATINGS – UK / NL / NORD											
Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
***	4.0	3.6	3.4	3.7	4.6	4.0	3.4	4.5	4.7	<b>4.04</b>	20
***	3.7	3.6	3.3	3.6	4.4	3.8	3.3	4.4	3.9	<b>3.85</b>	8
***	4.0	3.4	3.7	3.5	4.4	4.0	3.1	4.1	4.3	<b>3.85</b>	15
***	3.8	3.5	3.4	3.4	4.0	4.0	3.3	4.0	4.7	<b>3.82</b>	29
***	3.3	3.5	2.5	3.0	4.3	4.3	3.5	4.5	4.5	<b>3.74</b>	4
***	3.0	2.9	3.7	3.2	3.9	3.9	3.1	3.9	4.6	<b>3.60</b>	11
***	3.3	3.0	3.1	2.6	3.1	3.8	3.6	4.2	4.5	<b>3.47</b>	31
***	3.1	3.1	3.0	3.4	3.9	3.8	2.4	3.3	4.2	<b>3.39</b>	14
***	4.3	3.3	2.0	2.7	3.0	3.0	2.0	4.7	4.7	<b>3.37</b>	3
***	3.3	3.0	2.7	3.0	3.7	2.3	2.7	5.0	3.7	<b>3.32</b>	3
***	3.1	3.0	2.0	3.1	3.7	2.9	2.0	3.5	4.3	<b>3.14</b>	8
***	3.3	3.0	2.0	3.7	3.7	2.0	3.3	2.7	3.7	<b>3.09</b>	3
***	3.0	3.3	2.5	1.8	4.2	3.0	1.7	2.8	4.0	<b>3.02</b>	6
***	2.3	3.0	3.3	2.0	4.3	2.3	1.7	3.3	3.3	<b>2.93</b>	3
OTHERS											12
<b>Grand Total</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>170</b>

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*Mill Performance Rankings – UK, Netherlands & Nordic*

**FIGURE 69. MILL PERFORMANCE RANKINGS – UK / NL / NORD**

<b>Region / Factor</b>	<b>Account Mgt. / Customer Service</b>	<b>Flexibility of / Reaction to Price</b>	<b>Pack-aging Alternatives</b>	<b>Short Lead Times</b>	<b>Reliability of Delivery</b>	<b>Depth of Product Range</b>	<b>Innov. Marketing Approaches</b>	<b>Sustain-ability Policy</b>	<b>Financial Mill Position / Security of Fibre Supply</b>	<b>Average</b>
***	2	1	3	1	1	4	3	4	3	1
***	5	2	6	3	2	8	6	5	11	2
***	2	5	2	4	3	2	7	7	8	3
***	4	4	4	5	7	3	5	8	2	4
***	9	3	10	9	5	1	2	3	6	5
***	12	14	1	7	9	5	8	9	4	6
***	8	9	7	12	13	7	1	6	5	7
***	10	8	8	6	8	6	10	12	9	8
***	1	6	12	11	14	9	11	2	1	9
***	6	9	9	9	11	12	9	1	12	10
***	10	9	12	8	10	11	11	10	7	11
***	6	9	12	2	11	14	4	14	12	12
***	12	6	10	14	6	9	13	13	10	13
***	14	9	5	13	4	12	13	11	14	14

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### 8.4 Mill Performance Ratings – France, Belgium & Luxembourg

FIGURE 70. MILL PERFORMANCE RATINGS – FRA / BEL / LUX											
Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging / Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing. Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
***	4.0	3.4	3.6	3.6	3.9	4.1	3.6	3.8	4.4	<b>3.83</b>	18
***	3.7	2.9	3.7	3.7	4.4	3.2	3.5	4.3	4.3	<b>3.79</b>	7
***	3.8	2.7	3.5	3.9	4.1	4.1	3.2	4.2	4.2	<b>3.79</b>	26
***	3.4	3.4	3.7	3.6	3.8	3.7	3.0	4.0	3.8	<b>3.72</b>	6
***	3.3	3.7	3.5	3.3	4.3	3.8	3.0	3.8	4.4	<b>3.66</b>	5
***	3.6	2.7	3.2	3.6	3.8	3.9	3.3	4.0	4.1	<b>3.60</b>	9
***	3.9	2.5	3.5	3.1	3.6	3.8	3.4	3.8	4.3	<b>3.60</b>	21
***	3.5	3.7	2.3	3.8	3.8	3.3	3.0	4.3	3.8	<b>3.57</b>	4
***	3.5	3.0	2.0	2.8	4.0	3.0	2.8	4.0	3.7	<b>3.37</b>	4
***	3.8	3.0	2.0	3.3	3.7	2.8	2.7	3.7	3.5	<b>3.27</b>	6
***	3.3	2.8	3.5	3.3	3.4	3.2	3.0	3.1	3.3	<b>3.19</b>	13
***	3.5	2.5	3.0	2.0	3.5	2.8	2.5	4.0	4.5	<b>3.17</b>	4
***	3.0	2.3	2.7	2.3	3.0	4.0	3.3	3.3	3.0	<b>2.97</b>	3
***	2.5	3.0	3.0	2.5	2.0	3.0	3.0	2.5	3.0	<b>2.69</b>	2
***	1.5	1.5	3.0	1.5	2.5	3.5	2.0	2.5	3.5	<b>2.35</b>	2
OTHERS											3
<b>Grand Total</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>133</b>

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*Mill Performance Rankings – France, Belgium & Luxembourg*

FIGURE 71. MILL PERFORMANCE RANKINGS – FRA / BEL / LUX										
Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average
***	1	4	3	5	5	2	1	8	2	1
***	5	8	1	3	1	11	2	1	5	2
***	3	10	5	1	3	1	6	3	6	3
***	10	3	1	4	6	7	7	4	8	4
***	11	1	5	9	2	6	7	10	3	5
***	6	11	8	6	7	4	5	4	7	6
***	2	12	4	10	10	5	3	9	4	7
***	7	1	13	2	8	9	7	2	9	8
***	7	5	14	11	4	12	12	4	10	9
***	4	5	14	7	9	14	13	11	11	10
***	12	9	5	8	12	10	7	13	13	11
***	7	12	9	14	11	15	14	4	1	12
***	13	14	12	13	13	3	4	12	14	13
***	14	5	9	12	15	12	7	14	14	14
***	15	15	9	15	14	8	15	14	11	15

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### 8.5 Mill Performance Ratings – Italy, Portugal & Spain

FIGURE 72. MILL PERFORMANCE RATINGS – ITA / POR / SPA											
Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
***	4.0	3.0	3.4	3.6	4.0	4.1	3.9	4.5	4.3	<b>3.87</b>	35
***	3.8	2.9	3.4	3.8	4.0	3.9	3.5	4.3	4.3	<b>3.74</b>	8
***	3.9	2.9	3.4	3.3	3.9	4.3	3.8	4.1	4.3	<b>3.74</b>	16
***	3.8	3.4	3.3	3.8	3.2	3.0	3.0	4.8	4.0	<b>3.65</b>	5
***	3.2	3.2	3.7	3.5	3.5	3.9	3.0	4.2	4.4	<b>3.62</b>	10
***	3.9	3.6	3.1	3.0	3.7	3.1	2.6	4.7	3.9	<b>3.55</b>	9
***	3.7	3.7	3.2	3.0	3.5	3.5	2.8	4.2	4.2	<b>3.53</b>	6
***	3.9	3.2	3.2	3.5	3.6	3.9	3.1	3.6	3.4	<b>3.49</b>	16
***	3.4	3.5	2.8	3.9	4.0	3.7	2.3	3.3	3.9	<b>3.47</b>	12
***	3.7	4.0	3.3	3.6	3.3	2.4	1.9	2.8	3.4	<b>3.19</b>	7
OTHERS											34
<b>Grand Total</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>158</b>

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*Mill Performance Rankings – Italy, Portugal & Spain*

FIGURE 73. MILL PERFORMANCE RANKINGS – ITA / POR / SPA										
Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average
***	1	8	3	4	1	2	1	3	2	1
***	6	10	4	3	1	5	3	4	4	2
***	2	9	2	8	4	1	2	7	3	3
***	5	5	6	2	10	9	5	1	6	4
***	10	6	1	6	7	4	5	5	1	5
***	4	3	9	9	5	8	8	2	8	6
***	8	2	8	9	7	7	7	6	5	7
***	2	7	7	6	6	3	4	8	9	8
***	9	4	10	1	1	6	9	9	7	9
***	7	1	5	5	9	10	10	10	10	10

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## 8.6 Mill Performance Ratings – Russia

FIGURE 74. MILL PERFORMANCE RATINGS - RUSSIA

Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
***	4.6	3.9	4.3	4.3	4.5	4.7	4.4	4.8	4.8	<b>4.48</b>	12
***	4.3	4.1	4.1	4.3	4.3	4.1	3.4	4.8	4.8	<b>4.27</b>	8
***	4.3	3.6	4.2	4.2	4.5	4.3	4.1	4.4	4.6	<b>4.25</b>	13
***	4.3	3.7	4.3	4.0	3.8	4.0	3.5	4.3	4.8	<b>4.08</b>	4
***	3.7	2.7	4.0	3.7	4.3	4.3	3.3	4.0	4.3	<b>3.81</b>	3
OTHERS											24
<b>Grand Total</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>64</b>

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*Mill Performance Rankings – Russia*

FIGURE 75. MILL PERFORMANCE RANKINGS – RUSSIA										
<i>Region / Factor</i>	<i>Account Mgt. / Customer Service</i>	<i>Flexibility of / Reaction to Price</i>	<i>Pack-aging Alternatives</i>	<i>Short Lead Times</i>	<i>Reliability of Delivery</i>	<i>Depth of Product Range</i>	<i>Innov. Marketing Approaches</i>	<i>Sustain-ability Policy</i>	<i>Financial Mill Position / Security of Fibre Supply</i>	<i>Average</i>
***	1	2	2	1	1	1	1	1	1	1
***	3	1	4	2	4	4	4	1	1	2
***	2	4	3	3	2	3	2	3	4	3
***	3	3	1	4	5	5	3	4	1	4
***	5	5	5	5	3	2	5	5	5	5

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### 8.7 Mill Performance Ratings – Poland & Baltics

FIGURE 76. MILL PERFORMANCE RATINGS – Poland / BALTICS											
Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
***	4.0	3.5	4.0	4.1	4.4	4.5	3.6	4.0	4.6	<b>4.07</b>	21
***	4.3	3.6	3.9	3.9	4.2	4.0	3.9	4.2	4.6	<b>4.06</b>	21
***	4.2	3.9	4.1	3.5	3.8	4.0	4.2	4.3	4.4	<b>4.03</b>	20
***	3.7	3.4	3.8	4.0	4.2	3.7	3.1	4.0	4.4	<b>3.83</b>	15
***	3.6	2.9	4.0	3.8	4.5	3.8	2.7	3.9	4.6	<b>3.74</b>	10
***	3.0	2.8	2.8	2.8	2.8	3.4	3.6	4.4	4.2	<b>3.33</b>	5
OTHERS											33
<b>Grand Total</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>125</b>

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*Mill Performance Rankings – Poland & Baltics*

FIGURE 77. MILL PERFORMANCE RANKINGS – Poland / BALTICS

<b>Region / Factor</b>	<b>Account Mgt. / Customer Service</b>	<b>Flexibility of / Reaction to Price</b>	<b>Pack-aging Alternatives</b>	<b>Short Lead Times</b>	<b>Reliability of Delivery</b>	<b>Depth of Product Range</b>	<b>Innov. Marketing Approaches</b>	<b>Sustain-ability Policy</b>	<b>Financial Mill Position / Security of Fibre Supply</b>	<b>Average</b>
***	3	3	2	1	2	1	3	5	2	1
***	1	2	4	3	4	2	2	3	2	2
***	2	1	1	5	5	3	1	2	4	3
***	4	4	5	2	3	5	5	4	5	4
***	5	5	2	4	1	4	6	6	1	5
***	6	6	6	6	6	6	4	1	6	6

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### 8.8 Mill Performance Ratings – Bulgaria, Czech, Hungary & Slovakia

FIGURE 78. MILL PERFORMANCE RATINGS – BG / CZ / HU / SK

Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack-aging Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain-ability Policy	Financial Mill Position / Security of Fibre Supply	Average	Sample
<b>A.E. Level</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	
***	4.4	4.0	4.2	4.2	4.5	4.5	4.0	4.3	4.4	<b>4.28</b>	22
***	4.3	4.0	4.0	3.9	4.4	3.9	3.4	4.4	4.3	<b>4.09</b>	7
***	4.2	3.8	4.0	4.2	4.6	4.2	3.8	3.8	3.8	<b>4.08</b>	5
***	4.2	3.6	3.8	3.4	4.3	3.7	3.8	4.3	4.3	<b>3.95</b>	9
***	3.7	3.3	3.5	3.6	4.1	4.1	3.0	4.1	4.3	<b>3.78</b>	11
OTHERS											38
<b>Grand Total</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.x</b>	<b>x.xx</b>	<b>92</b>

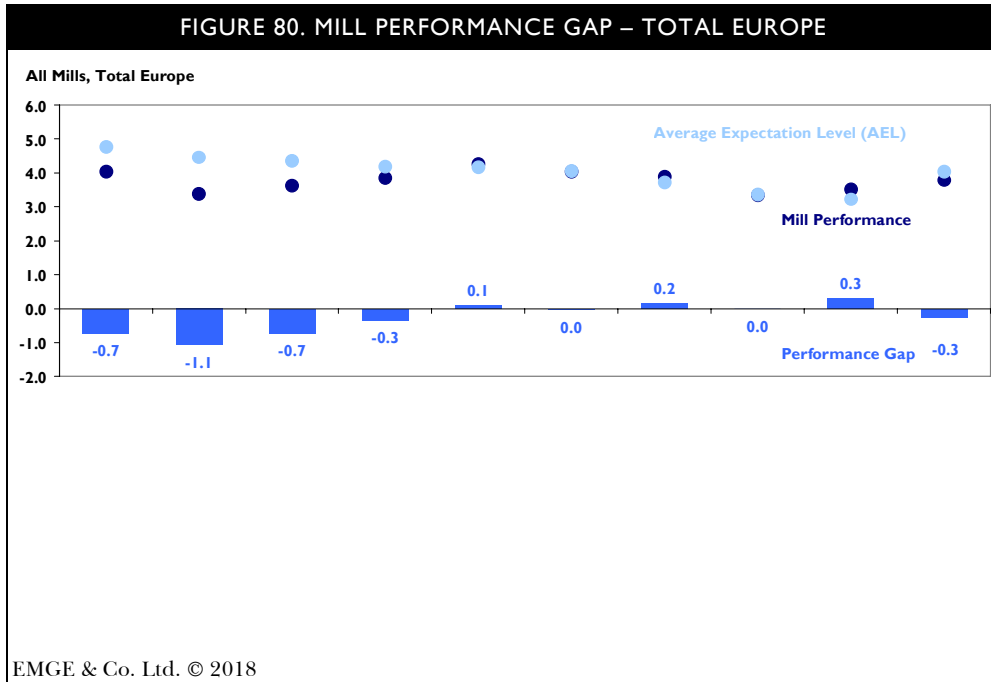
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*Mill Performance Rankings – Bulgaria, Czech, Hungary & Slovakia*

FIGURE 79. MILL PERFORMANCE RANKINGS – BG / CZ / HU / SK										
Region / Factor	Account Mgt. / Customer Service	Flexibility of / Reaction to Price	Pack- aging Alternatives	Short Lead Times	Reliability of Delivery	Depth of Product Range	Innov. Marketing Approaches	Sustain- ability Policy	Financial Mill Position / Security of Fibre Supply	Average
***	1	1	1	2	2	1	1	3	1	1
***	2	1	2	3	3	4	4	1	4	2
***	4	3	2	1	1	2	2	5	5	3
***	3	4	4	5	4	5	3	2	2	4
***	5	5	5	4	5	3	5	4	3	5

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# 9 Mill Performance Gap



The Mill Performance Gap provides a good indication of respondent satisfaction levels with their suppliers.

The chart above compares the mill Average Expectation Level (in descending order of importance) against the overall Mill Performance average, in order to identify the Mill Performance Gap across each factor.

The Performance Gap provides a good indication of the level of respondents' satisfaction with papermakers' performance on these issues, whereby a negative number indicates that, on average, mills are not meeting the desired respondent expectation level.

According to survey respondents, suppliers fail to meet their overall expectations, particularly in terms of xxx, xxx and xxx issues; attributes which are considered to be most important when choosing a supplier of Cutsized paper.

On the other hand, suppliers are meeting (if not exceeding) respondents' expectations when it comes to their xxx, xxx, xxx, xxx and xxx.



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# 10 Shift to Lower Grammages

**FIGURE 81. MARKET SHIFT FROM 80 GSM TO 75 GSM – TOTAL EUROPE**

REGION	NO	YES, of which:	BIG	MEDIUM	SMALL	DK
GER/AUT/SWI	xx%	xx%	xx%	xx%	xx%	x%
UK/NL/NORD	xx%	xx%	xx%	xx%	xx%	x%
FRA/BEL/LUX	xx%	xx%	xx%	xx%	xx%	x%
ITA/POR/SPA	xx%	xx%	xx%	xx%	xx%	x%
<b>W.EUROPE</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>x%</b>
RUSSIA	xx%	xx%	xx%	xx%	xx%	x%
POL/BAL	xx%	xx%	xx%	xx%	xx%	x%
BG/CZ/HU/SK	xx%	xx%	xx%	xx%	xx%	x%
<b>E.EUROPE</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>x%</b>
<b>EUROPE</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>x%</b>

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xxx of survey respondents reported seeing a shift from 80gsm to 75gsm in the market. Of those that reported seeing a shift to 75gsm, xxx said the shift was moderate.

The chart above shows the overall survey results to a question concerning a shift to lower grammages in the market, specifically from xxgsm to xgsm Cutsized papers.

Of those respondents that reported seeing a shift to lower grammages, they were then asked to what extent the shift was happening.

Exactly xx of survey respondents mentioned seeing a market shift from xxgsm to xgsm. The xxxx of these respondents reported that the shift was xxxx, while nearly x in x (xx%) reported that the shift was xxxx.

Around x in x respondents (xx%) reported a xxxx shift to xgsm, while a xxx xxx were unsure.

Interestingly, more than xxxx (xx%) of respondents in West Europe reported seeing a shift to xxx grammages, with more believing the shift was xxx than xxx.

In contrast, xxx than xxx (xx%) of respondents in East Europe reported seeing a shift to xxxx grammages, of which only a xxx xxx (xx%) felt the shift was xxx.

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# 11 Colour Laser to Inkjet

**FIGURE 82. MARKET SHIFT FROM COLOUR LASER TO INKJET – TOTAL EUROPE**

REGION	NO	YES, of which:	BIG	MEDIUM	SMALL
GER/AUT/SWI	xx%	xx%	xx%	xx%	xx%
UK/NL/NORD	xx%	xx%	xx%	xx%	xx%
FRA/BEL/LUX	xx%	xx%	xx%	xx%	xx%
ITA/POR/SPA	xx%	xx%	xx%	xx%	xx%
<b>W.EUROPE</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>
RUSSIA	xx%	xx%	xx%	xx%	xx%
POL/BAL	xx%	xx%	xx%	xx%	xx%
BG/CZ/HU/SK	xx%	xx%	xx%	xx%	xx%
<b>E.EUROPE</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>
<b>EUROPE</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>

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x in x respondents reported seeing a shift from xxxx to xxxx in the market, of which the xxxx reported a xxxx shift.

The chart above shows the overall survey results to a question concerning a shift from Colour Laser to Inkjet in the market.

x in x (xx%) respondents reported seeing a market shift to Inkjet, of which the xxxx said that the shift was xxxx.

Of those remaining respondents that reported seeing a shift (excluding those that said xxxx), xx% felt that the shift was xxx and xx% felt that the shift was xxx.

In West Europe, around x in x respondents (xx%) reported seeing a shift from colour laser to inkjet, of which around x in x (xx%) reported a xxx shift.

Meanwhile, only x in x respondents (xx%) in East Europe reported a shift to inkjet. Of those that did, the xxx (xx%) reported that the shift was xxx.

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## 12 Environmental Importance

FIGURE 83. ENVIRONMENTAL IMPORTANCE – TOTAL EUROPE

REGION	RECYCLED CONTENT	FSC CERTIFIED	PEFC CERTIFIED	LOWER GRAMMAGES	GREEN PACKAGING
GER / AUT / SWI	xx%	xx%	xx%	xx%	xx%
UK / NL / NORD	xx%	xx%	xx%	xx%	xx%
FRA / BEL / LUX	xx%	xx%	xx%	xx%	xx%
ITA / POR / SPA	xx%	xx%	xx%	xx%	xx%
<b>WEST EUROPE</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>
RUSSIA	xx%	xx%	xx%	xx%	xx%
POL / BAL	xx%	xx%	xx%	xx%	xx%
BG / CZ / HU / SK	xx%	xx%	xx%	xx%	xx%
<b>EAST EUROPE</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>
<b>TOTAL EUROPE</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>	<b>xx%</b>

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xxx was considered the most important Environmental factor when choosing a brand of Cutsite paper.

The ratings for Factors of Environmental Importance are shown in the chart above.

According to survey respondents, **xxx** is considered the most important *environmental* factor when choosing a brand of cutsite paper, followed closely by **xxx**.

**xxx** was considered important by 1 in 2 respondents.

Meanwhile, **xxx** and **xxx** were considered less important Environmental factors.

Respondents in xxx considered all environmental factors to be substantially more important than those in xxx.

Other Environmental Importance factors mentioned:

- xxx

- xxx

- xxx

- xxx

- xxx

- xxx

- xxx

- xxx

- xxx

- xxx

- xxx

- xxx