

SURVEY SUBJECT: Foreign Competition

DATES OPEN: 9 - 24 Mar 09

SUMMARY FINDINGS:

NO. OF RESPONDENTS: 98

(95% Confid. Level, + / - 10% Error Band)

The US respondents were 65% of total, Canada was 7% of total, Western Europe was 6%, all others were less.

- When asked about foreign competition, 48% said it is a threat to their mill.
- The biggest concern was labor costs (32%) followed by loose environmental regulations (18%).
- 66% of respondents report their company regularly lobbies their home country's government for protection.
- 63% cite "other cost cutting" as the primary way they address foreign competition.
- 38% say it is "possible" or "almost certain" foreign competition will force their mill to shut in the next five years.
- 76% report their country does not use tariffs to thwart foreign competition.
- 17% report their country uses threats of retaliation with other goods to protect forest products.
- 35% blame environmental groups for favorable treatment of foreign pulp and paper products in their home market.

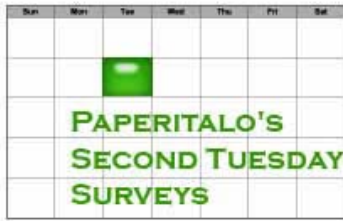


PAPERITALO PUBLICATIONS 2ND TUESDAY SURVEYS

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SURVEY OVERVIEW

Second Tuesday Surveys are summarized in the first edition of PaperMoney® of the second month after the survey started (approximately eight weeks after the survey started). PaperMoney® is free.

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