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2009

English

Z-INFO

ZIEGLER PAPER MILL

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ZIEGLER
P A P I E R

www.zieglerpapier.com



DEAR READERS

The world has always been an inventive place, and there are some fundamental changes in the air in our familiar old industry, as well. For a good 5 years now, we have been experiencing a technological shift in the area of transactional and transpromotional printing from toner systems to inkjet printing systems. But what do we actually mean when we talk about transactional and transpromotional printing? Transactional printing is used to produce the statements of account and invoices that we receive at the end of each month. Transpromotional printing is an artificial word made up from transactional and promotional printing i.e. advertising. Every day, you receive mail (invoices, statements of account, etc.) that is addressed specifically to you and whose content is intended for you alone; this represents a still underrated method of addressing people directly and individually. In order to strengthen customer ties, companies in various countries around the world are today making use of what is known as white-space marketing. The unprinted "white" areas on a statement or invoice are filled with personalised information. This means that some of you will in future be receiving invoices or statements of account that contain additional information tailored specifically for one person: for you! This is the shape of things to come. In countries like Taiwan, England, USA and Finland, this has long been common practice and people are positively inclined toward this kind of customer contact. Invoices here are no longer printed in black-and-white but in four-colour and provide additional information. This might be in the form of coupons or details of special offers that are individually customised to the recipient's profile! At Ziegler Paper Mill, we have actively accompanied and supported this technological change. Our Z-Plot 650 paper

from the CAD/Office line has become a worldwide benchmark for transpromotional printing applications and is described by Kodak as the "golden standard". We have surpassed ourselves on the international front here and have gained a reputation throughout the world.

In close collaboration with OEMs (original equipment manufacturers), we have gathered our core competences from the realms of continuous form printing and inkjet technology and have been extremely successful in positioning our products. Transpromotional documents are created in a highly complex value-added process that places high demands on runnability and printability. The complexity of this application calls not only for new product properties but also for new consulting services to assist our customers. We have consistently and actively put these in place over the past several years as is shown by modifications in production and by the inclusion of a new tool on our website - the "Solution Finder".

New technology, however, always involves learning something new and implementing this at the organisational level. A paper mill is a complicated and vast organisation and changes have to be implemented with a lot of care. But this has proved extremely successful in respect of transactional and transpromotional printing. Further market areas will be following in the future.

The year 2009 will hold new challenges for us! And we will find solutions to these new challenges in the form of new products and new services. So here's to a successful and innovative new year!

Susanne Oste – susanne.oste@zieglerpapier.com
Head of Product Management

CORPORATE DESIGN

Attention, new product: Z-Bond RPI! Our company lives from its powerful brands. Z-Bond Classic is Ziegler Paper Mill's traditional brand. We make very high demands of Z-Bond Classic, not only in respect of grammage (40 to 400 gsm), but also in respect of applications. For this reason, we are constantly adapting it to meet new market requirements. In recent years, the challenge has on the one hand been the increased use of natural papers for premium printed matter. On the other, we have had to meet growing demands in the area of digital printing. Now we are launching yet another innovation: Z-Bond RPI. This is a modified Z-Bond Classic that is initially being produced in 80 and 90 gsm. The innovation lies in its improved printability with pigmented inkjet inks. To begin with, we are targeting roll-fed printers like the Kodak VL 2000, IBM Infoprint 5000 and Screen Truepress 520. Z-Bond RPI is intended to complement Z-Plot 650 in this area of application: it does not replace it, but is positioned one level below Z-Plot 650.

Another successful product is Z-Plakat plus. Z-Plakat plus (110 gsm) is a water-resistant poster paper with a blue reverse side. It can be offset printed and can also be used as a laminating base paper for solvent inkjet applications. It is now also being used for CrystalPoint technology from OCE (OCE Color-Wave 600).

A fact that is not yet so widely known is that we also produce weights of 300 and 400 gsm. Here, we make the base paper which is then laminated externally. A good many wholesalers already have these weights in stock; in Switzerland: Sihl + Eika and Fischer Papier. Our mill warehouse carries stocks in 72x102 and 102x72 formats.

Ziegler's thin printing papers are primarily used for pharmaceutical package inserts and Ziegler Paper Mill has become a quality leader in this segment, with most major pharmaceutical manufacturers in Europe linked in one way or another with Z-Bond Classic in 40/45 and 50 gsm weights.

 **NATURAL DESIGN**

Z-Offset W is also available in 300 and 400 gsm, which means that Z-Offset W can now be used for almost as many applications as Z-Bond Classic.

One great challenge for us is the goal we have set ourselves of ensuring that production of Natural Design papers has no negative impact on the environment. One aspect of environmentally-friendly production is processing the pulp in the form in which we receive it. Because we use as few colour pigments and brighteners as possible, maintaining a consistently uniform shade (brightness) is extremely difficult. We are endeavouring to improve our control over the fluctuations that occasionally occur.

 **CAD/OFFICE**

Great things have been happening on the inkjet front at Ziegler since Drupa 2008! Z-Plot 650 has been tested on a huge number of inkjet systems and found to be very good every time. The Z-Plot 650 brand is well-known everywhere and is used as a reliable benchmark. The paper market is changing here, too, with the growing installation of web-fed inkjet printers. As pioneers, we were virtually alone in the initial stages of

this movement; today, in the growth phase, we find ourselves competing with a broad range of offerings. Currently in the pipeline, we have a paper with a light coating that will be superior in quality to Z-Plot 650. We will be reporting on this development in greater detail later in 2009.

Inkjet technologies will be spreading very rapidly in the printing sector in the coming two years, with Kodak, for instance, aiming to replace offset printing with its Stream Technology. Ziegler will be playing its part here by providing solutions that are in line with our philosophy of keeping step with major developments. We will be providing hybrid solutions that will cover the demands of both offset and inkjet printing with the same paper. This is an exciting challenge for us, which we are all looking forward to tackling.

 **SPECIALTIES**

Z-Pharma is to remain in the programme! Which is good news for many of our customers. Although we initially intended to concentrate on Z-Bond Classic, our customers insist on the second quality. So we have called a halt to our plans to withdraw this product and will be continuing to produce Z-Pharma in weights of 40 and 50 gsm.

For a good many years now, Ziegler Paper Mill has been strongly committed to environmental concerns. This is evidenced for example by its introduction more than ten years ago of papers using wood from controlled sources, by its successful implementation of energy efficiency measures and by its effective reduction of harmful emissions. As part of the ongoing development of our environmental strategy, a comprehensive life-cycle assessment of an average Ziegler paper quality was drawn up last year. The findings shown by this ecological balance sheet will be incorporated into decision-making in respect of future environmental measures and will allow us to focus more sharply on areas of importance.

One major area where we will be concentrating is bound to be the continuing reduction of emissions that affect the climate. In addition to the life-cycle assessment, therefore, we also calculated Ziegler Paper Mill's carbon footprint. The following report deals with this subject in greater detail.

ZIEGLER PAPER'S CARBON FOOTPRINT

A carbon footprint shows the total sum of greenhouse gases that are produced during the entire life cycle of a product, for example. In order to determine the carbon footprint, it is not only the direct emissions given off during manufacture that are measured, but also all the relevant indirect emissions produced for instance during production and transport of raw materials which are purchased from external suppliers. To obtain the end result, all the various greenhouse gases are converted in accordance with their greenhouse effect into CO₂ equivalents (CO₂ eq) and the total calculated.

In order to determine Ziegler Paper Mill's carbon footprint, all our purchased pulp and chemicals were therefore analysed to establish their output of CO₂. The results showed that more than half of Ziegler Paper Mill's carbon footprint could be traced back to purchased materials. It was also shown that there are big differences between various sorts of pulp. We will be making use of these findings in our purchasing activities in order to minimise our carbon footprint and the overall environmental impact of our products.

When all emissions "from cradle to mill gate" are costed in, the carbon footprint of one kilogramme of Ziegler paper currently

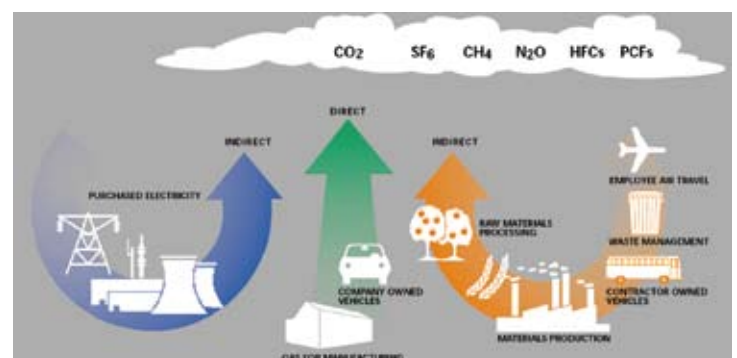
amounts to 1.4 kg CO₂ eq. Of this, 40% is the result of our own energy production using natural gas, while a further 40% comes from the manufacture and transport of the pulp we purchase. One fifth of the carbon footprint is caused by the production of the chemicals we buy to make our paper.

In order to satisfy increased enquiries from customers concerning this topic, we have developed a useful tool that enables our sales team to calculate the correct answers to detailed environmental questions.

OUR CO₂-NEUTRAL PAPER

Ziegler Paper Mill has already done a great deal in order to reduce its carbon footprint; for example, by successfully introducing various measures to increase energy efficiency. As Ziegler Paper Mill's CO₂ output is actually lower than the targets agreed on with the Swiss government, we are now credited with so-called "carbon offsets" from the state. For last year, these amounted in concrete terms to 5500 tonnes of CO₂ eq. Thanks to these carbon offsets, we are in a position to offer customers who so wish the equivalent volume of CO₂-neutral paper. In order to be permitted to call a certain volume of paper CO₂-neutral, the carbon footprint of this paper has to be offset, or balanced, against an appropriate number of carbon credits – that is to say, CO₂ emissions that have been avoided. In these cases, as is usual at Ziegler, not only is the paper produced 100% in Switzerland, but the reduction in CO₂ is achieved totally within Switzerland, as well.

Calculating the carbon footprint of Ziegler papers: all relevant emissions have been included.





DIARY: ZIEGLER PAPER AT TRADE SHOWS

HUNKELER INNOVATIONDAYS, LUZERN, 16.-19.2.2009

Come and see us in Hall 1, Stand No. 16.

ON DEMAND PHILADELPHIA, 30.3.-2.4.2009

LABELXPO, BRUSSELS 23.9.-26.9.2009

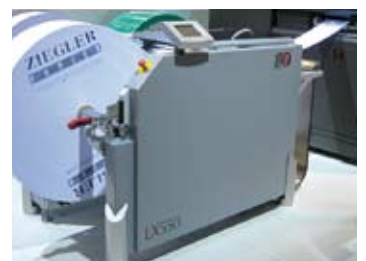
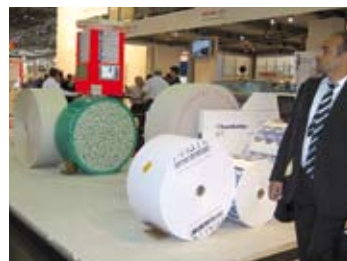
SALES MEETING IN GRELLINGEN, 9.5.2008

All Ziegler's sales agents active around the world met together at the Ziegler headquarters in Grellingen. At the day-long meeting, information on the various markets and new developments was exchanged during presentations and discussions. This enables our sales agents, who operate in a wide variety of different countries, to remain completely up-to-date on Ziegler's products and thus be better equipped to deal with their customers' requirements. Also taking part in discussions were members of the company's management, production

team, research and development department and sales staff. The sales meeting was rounded off with an enjoyable dinner and musical accompaniment.

DRUPA IN DÜSSELDORF, 29.5.-11.6.2008

Although Ziegler Paper Mill did not field a stand of its own in Düsseldorf, its premium quality papers nonetheless left a lasting impression. Visitors to the show who were interested in industrial inkjet and laser printing and in web finishing came face to face with rolls of Ziegler paper on the stands of most of



ZIEGLER PAPER SUPPORTS SPORTING AMBITIONS

22-year-old Tanja Bohni from Luzern describes her rather unusual passion – shooting – as a “kind of school for life”. And anyone who observes this sport more closely will soon see what she means. A high level of concentration, patience and physical control are more necessary for Tanja’s favourite hobby than in hardly any other area of life.

Even as a child, Tanja Bohni, who works in the purchasing department of Ziegler Paper Mill, used to accompany her parents to shooting contests. For the past six years, she has been continuing the family tradition herself over distances of 10 and 300 metres. And she has been extremely successful. First-place in a variety of association championships, winner of the Basel championship in both 2007 and 2008, plus consistently good results in Swiss national championships bear eloquent testimony to her skill. So it’s no wonder that she has now set herself an even higher target and is busy training for it four times a week. “I want to get onto the



national team,” she explains – and she looks all set to achieve this lofty goal. Tanja Bohni is keen on increasing general acceptance of her sport. “All too often, shooting is incorrectly associated with violence,” she explains with reference to criticism of her hobby. She also points to the high demands that top-level competition shooting places on both physical and mental stamina.

Ziegler Paper Mill is happy to support Tanja Bohni’s sporting ambitions as a sponsor and is already looking forward to her future successes.

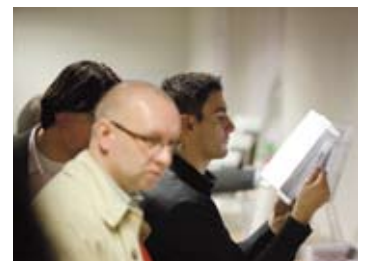
the world’s leading equipment manufacturers. Exhibitors attach maximum importance to the optimum runnability, top performance and proven security of the qualities of paper they use in tests on their printing and finishing systems. And Ziegler papers meet these requirements to the full. It was primarily Z-Plot 650, together with Z-Plot 450 and Z-Bond Classic, all in 90 gsm, that were used. Ziegler papers were chosen to demonstrate black-and-white and four-colour print production in particular, including the latest DOD technology: in transactional and transpromotional applications, package inserts, direct mail, book signatures, imprints in coupon offset preprints and many other uses.

ZIEGLER’S BEST PRIZE-GIVING EVENT, 13.11.2008

Over the past five years, it has proved possible to establish our “Ziegler’s best art & print work” prize as a highly-regarded design award. It is awarded for print products which demonstrate an outstanding level of creative and technical excellence and which are produced using paper manufactured by Ziegler Paper Mill. A grand total of 160 works from 6 European countries were submitted for this year’s competition. Three of these were awarded certificates on 13.11.08. In addition, six further entries received merchants’ prizes. The exclusive prize-giving event was staged at the Atlantis Club in Basel, a locale rich in tradition. The guests invited had been put in the

right mood for the evening’s celebrations by a varied programme which included lunch in the Executive Lounge of the Hotel Ramada and our traditional tram trip. At 7.30 in the evening, the time had finally arrived and the winners were presented with their prizes. The Ziegler’s best award ceremony 2008 was rounded off with dinner and live music. Entry documentation for Ziegler’s best art & print work 2009 will be sent out this coming April.

Further details can be found at www.zieglerpapier.com



WHAT DOES 2009 HOLD IN STORE?

All of us have to make plans for the future. To do so, however, we need to have an idea of the general context. And this in turn is based on assumptions. This is how we drew up our 2009 budget last August. All well and good – but in the meantime the economic world seems to have been turned upside down. Back in August, the indicators were pointing upward, today they are pointing down. What are managers like us supposed to do in the light of all the negative reports (so far, we have not noticed very much ourselves!)? Plan for emergency scenarios with looks of horror on our faces? Run down stocks, ensure liquidity, save? Great idea – the patient's already lying on the

floor, so let's give him a kick to make matters worse! I've been in the paper business now for more than 28 years, so I feel entitled to make another suggestion: take a good look at your product programme and ask yourself whether your positioning is strong enough for you to still be here in five years' time. If you did your homework properly back in the times of economic boom, then you should have sufficient liquidity to see you through a bumpy 2009. However, if you do not do your homework now in respect of your company's strategic range of products, then it might well be too late in 5 years' time.

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