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Sawn softwood in Egypt – A market study

*En marknadsundersökning av den
Egyptiska barrträmarknaden*

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Keywords: Egypt, North Africa, market study, softwood, redwood, import, export, customer needs

*Master Thesis, 30 ECTS credit
MSc in Forestry 07/12*

*Advanced level in Business Administration
(EX0753)*

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Abstract

This market study was written on behalf of Uni4 Marketing (U4M) and investigates the Egyptian softwood market. The objective was to identify what characterises a good softwood supplier according to Egyptian importers. In addition to this U4M's competitiveness compared to their competitors was evaluated. The study also identified possible sources of competitive advantage possessed by U4M. An additional literature study was performed, aiming to increase the general knowledge about the Egyptian market.

The data collection was done by means of face-to-face interviews with seven softwood importers in Alexandria, Egypt. A questionnaire was also developed to collect numerical data about the importance of the investigated supplier characteristics as well as data about U4M's performance.

The findings show that the Egyptian demand has become more diverse and that it is important for the importers to be provided with products of varying qualities. Egypt can therefore no longer be regarded as a market that only demands softwood products of the lowest qualities. A personal relationship to the supplier, the supplier being large and that it is easy to contact the supplier is important criteria, characterising a good supplier. In addition to this the importers regard physical product characteristics, such as absence of knots and twist as important. The variety amongst the criteria characterising a good supplier shows that Egypt is a complex market to serve. U4M are perceived as one of the best performing suppliers in Egypt. Their main strength lies in being easy to contact. U4M's structure of ownership, their sales office Unirets and their long presence in the Egyptian market were identified as sources of competitive advantage.

Keywords: *Egypt, North Africa, market study, softwood, redwood, import, export, customer needs*

Sammanfattning

Denna marknadsundersökning skrevs på uppdrag av Uni4 Marketing (U4M) och undersöker den Egyptiska marknaden för sågade barrträvaror. Syftet var att undersöka vad som karakteriserar en bra leverantör enligt Egyptiska träimportörer. Förutom detta analyserades U4M's konkurrenskraft i förhållande till deras konkurrenter. Studien identifierade även tänkbara konkurrensfördelar som U4M innehar. En kompletterande litteraturstudie genomfördes i syfte att öka den allmänna kunskapen om den Egyptiska marknaden.

Datainsamlingen gjordes genom personliga intervjuer med sju träimportörer i Alexandria, Egypten. Dessutom samlades data in med hjälp av en enkät. Enkäten användes för att samla in numeriska data om vad importörerna värdesätter hos en leverantör och om U4M's prestation.

Resultatet visar att den Egyptiska efterfrågan har blivit mer diversifierad. Därför är det viktigt för importörerna att bli försedda med produkter av varierande kvalitet. Egypten kan därför inte längre betraktas som en marknad som bara efterfrågar produkter av de lägsta kvaliteterna. En personlig relation till sin leverantör, att leverantören är stor och att det är enkelt att kontakta den värderas högt. Dessutom anser importörerna frånvaro av bl.a. kvistar och skevhet är viktigt när man diskuterar den fysiska produkten. Variationen bland de kriterier som karakteriserar en bra leverantör visar att Egypten är en komplex marknad att vara verksam i. U4M betraktas som en av de bästa leverantörerna på den Egyptiska marknaden. Deras främsta styrka ligger i att de på ett enkelt sätt kan kontaktas. U4M's ägarstruktur, deras säljkontor Unirets och deras långa närvaro på den Egyptiska marknaden identifierades som konkurrensfördelar.

Nyckelord: Egypten, Nord Afrika, marknadsundersökning, barrträvaror, furu, import, export, kundbehov

Preface

This study has been the most interesting period of my years as a student and has truly given me joy and understanding that I never expected.

I would like to thank Anders Söderlund, my supervisor at Uni4 Marketing. Your knowledge and support has enhanced my ability to perform this study. I would also like to thank Anders Roos, my supervisor at SLU. Your constructive criticism and ideas have helped me a lot during this period.

I would also like to thank Ossama Talaat and Amr Shaheen at Unirets for introducing me to the Egyptian softwood market. You made the customer visits possible and facilitated the communication between the importers and me.

Finally I would like to thank Anders Marklund, Managing Director at Uni4 Marketing, and the board of Uni4 Marketing for allowing me to realize this study.

Thank you,

Alexandria, April 2012

Johan Edgren

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1 Introduction

1.1 Background

The Swedish sawmilling industry contributes significantly to Sweden's trade balance and is thereby of importance for the Swedish economy. In 2010 approximately 70 % of the sawnwood produced in Sweden was exported. The main share is sawn and planed softwood (further called softwood) that historically has been destined to European markets. This has changed during the last decade, between 1990 and 2010 the non-European markets increased their share from approximately 12 to 30 % of the exported softwood. (Skogsindustrierna 2011)

North Africa¹ is a large softwood importer that has become one of Sweden's major buyers (Figure 1). This region has expanded simultaneously as historically large European markets have decreased or stagnated (Figure 2). The total volumes imported by this region have increased since 2002. North Africa imported over 7.5 million m³ in 2009 and during that same year Sweden exported over 2 million m³ to North Africa. (FAO 2012)

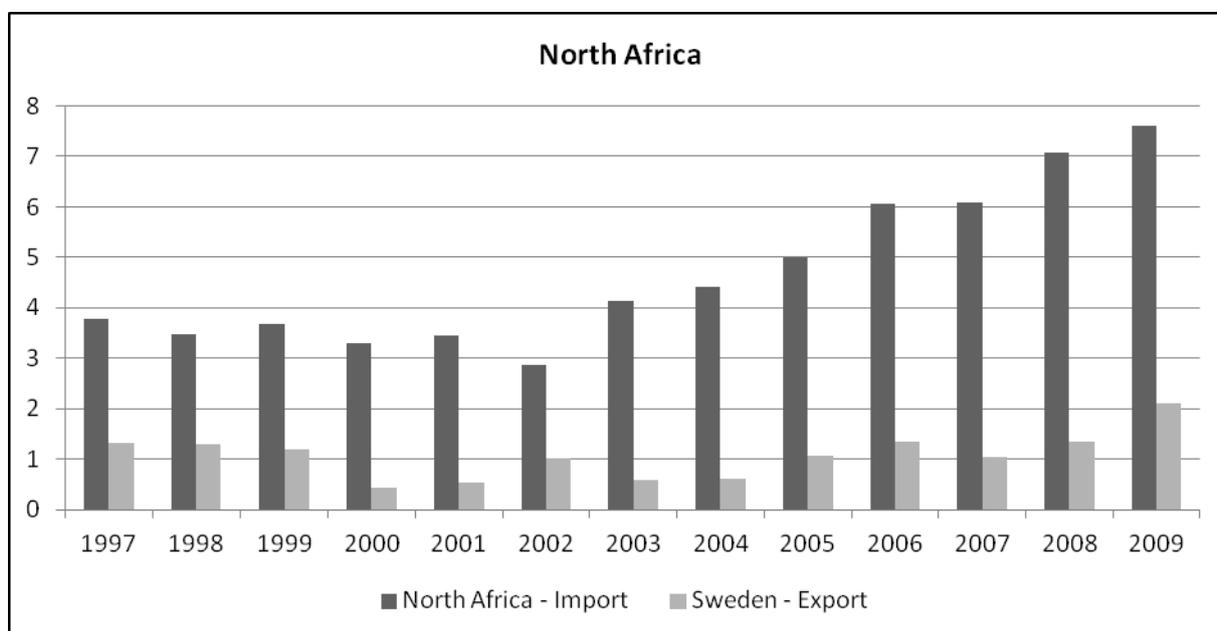


Figure 1. North Africa's import (million m³) and Sweden's export of softwood to North Africa (Western Sahara is not included) (FAO 2012).

¹ Algeria, Egypt, Tunisia, Morocco, Sudan, Western Sahara and Libya (FAOSTAT's definition)

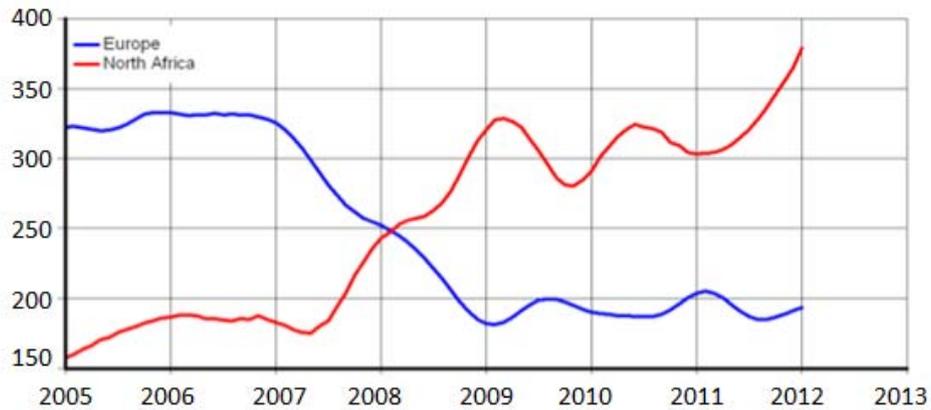


Figure 2. Swedish and Finnish monthly exports of sawn redwood (1000 m³) to main European markets and North Africa (Woodstat 2012).

Egypt is the largest North African importer and the majority of the softwood imported from Sweden is Swedish Redwood (*Pinus sylvestris L.*) (Skogsindustrierna 2012). In connection with the financial crisis that struck Europe in 2008 the Swedish export of softwood to North Africa, particularly Egypt increased heavily (Figure 3). Between 2007 and 2008 Swedish export to Egypt increased from 0.25 to 1.1 million m³. Because of the low degree of integration between the North African economies and the European's, the North African countries could prove comparatively strong purchasing power when other markets broke down (Dagens Industri 2009). There was a shift from volumes exported to Europe to North Africa, especially to Egypt (Figure 2). Egypt imported 1.1 million m³ softwood from Sweden in 2011, making them the third largest importer after the United Kingdom and Germany. The Egyptian import constituted 9 % of Sweden's total export of softwood. (Skogsindustrierna 2012) The current economic situation in Europe is not far from what it was in 2008. The debt crisis has decreased the activity in the building sector, which is one of the major drivers of softwood consumption. The North African markets are therefore likely to play an important role for the future of the Swedish sawmilling industry. (SvD 2012)

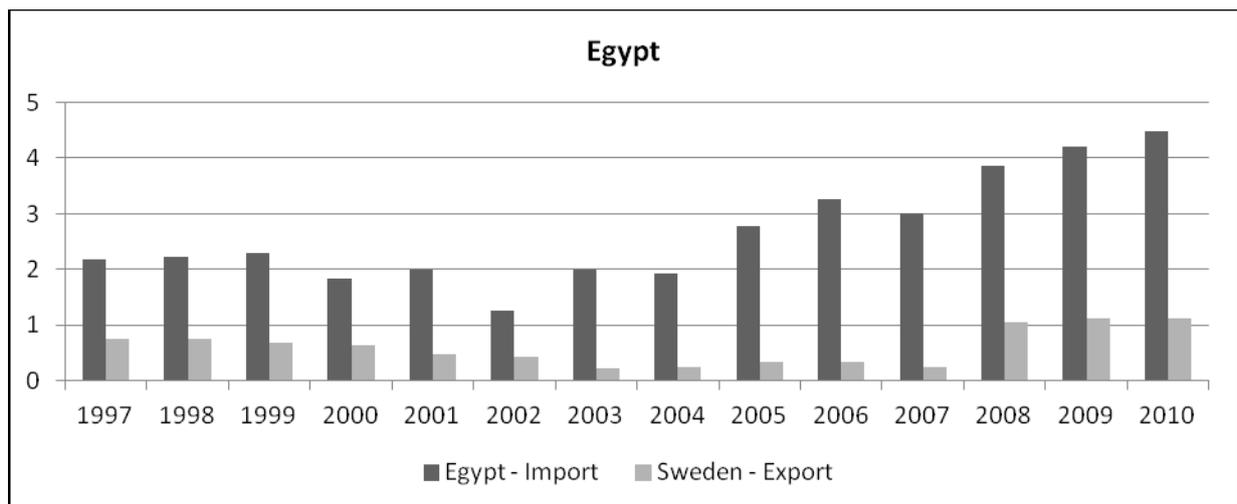


Figure 3. Egypt's import and Sweden's export of softwood to Egypt (million m³) (FAO 2012 & Skogsstyrelsen 2011).

1.2 Uni4 Marketing

SCA Timber, Holmen Timber, Södra Timber and Martinsons Trä jointly own Uni4 Marketing (further called U4M). U4M was established in 2000 and exports softwood products to Middle Eastern and North African (MENA) countries where the owners lack own representation. Via their owners U4M has access to 22 sawmills, enabling them to provide their customers with a wide range of softwood products. (Uni4 Marketing AB 2012)

U4M's greatest markets are Egypt, Algeria and Saudi Arabia. Egypt is the largest of these and during 2011 U4M exported nearly 600 000 m³ softwood, whereof 290 000 m³ were destined to Egypt. Approximately 90 % of the volume destined to Egypt consisted of Swedish Redwood (*Pinus sylvestris L.*) and 10 % of Whitewood (*Picea abies L.*). (Uni4 Marketing AB 2012)

Unirets is U4M's sales unit in Egypt and functions as a link to Egyptian importers that sell the products to end-consumers, mainly in the construction, joinery and furniture industry. Unirets works with U4M and a Finnish softwood supplier named Rets Timber (Uni4 Marketing AB 2012).

1.3 The need for an improved knowledge about the Egyptian customers

International companies such as U4M should conduct research in their local markets to investigate consumer needs and consumption patterns. This information can be used as a base for executive action and is crucial to enhance the chances of success. (Lascu 2008)

A company's success is correlated to the understanding of their customer's perception of good quality. Delivering quality from a customer perspective is a primary strategic factor for competing successfully. Customer perceptions have been recognized as the key to delivering high-quality products. (Hansen, Bush and Fern 1996) When reviewing earlier studies it is obvious that the Egyptian softwood market has not previously been investigated. Neither have other North African softwood markets. The main reason for this is the long history of export dominated to European markets, but also linguistic and cultural barriers that aggravate the conduction of studies. The competence associated with the market is concentrated to the companies, active in export to Egypt and the general knowledge outside these companies is low. This confirms a general gap of knowledge regarding the Egyptian softwood market.

There are, furthermore, changes taking place that makes Egypt a promising market. One is the increasing demand for softwood of higher qualities. The softwood exported to Egypt has historically been of low quality according to Swedish grading rules. However, U4M is experiencing an increasing demand for products in varying qualities (SCA Timber 2009). Since it is beneficial for U4M to operate in a market that demands all products derived from the sawmilling process this is a positive change. There are also political changes taking place in Egypt and the downfall of Hosni Mubarak could be the start of a shift from an authoritarian regime to a democratic government. Even though transitions like these are slow the political changes taking place are promising for the future, assuming that the shift takes the right turn.

The products sawn from northern Swedish raw material have a better reputation in the Egyptian market than the southern. As a result from Holmen and Södra opening two sawmills in southern Sweden the southern products are projected to increase in proportion to the northern. In order to manage this and the previously mentioned changes it is crucial to increase the knowledge of what the importers value and require.

Aside from the language barrier that exists there are other differences associated with operating in Egypt compared to countries more similar to Sweden. One is that long-term and personal relationships between buyers and sellers play a significant role. In order to be a successful supplier in Egypt you need to show continuous presence, also in times when the western economy is strong (SCA Timber 2009). U4M handle their sales via an intermediary company (Unirets). This has proven to be effective but “*with increased knowledge comes a better ability to long-term serve the market in the best possible way*” (Ek 2012). The board has therefore requested U4M to support this market study.

1.4 Objective

The aim of the study is to increase the general knowledge about the Egyptian softwood market. The study should:

1. Identify what characterises a good softwood supplier, according to the importers.
2. Evaluate U4M’s competitiveness compared to their competitors.
3. Identify sources of competitive advantage possessed by U4M.
4. Identify what U4M can improve seen from a customer perspective.

The studied customer segment will be softwood importers located in Alexandria. Competitors are defined as Swedish, Finnish and Russian softwood suppliers.

1.5 Outline of the study

The following chapter is a literature review that summarises previous studies made on the investigated field in other markets than the Egyptian. This is followed by The Egyptian Market which is an overview to give the reader an increased understanding of the Egyptian market. It focuses on aspects that affect softwood suppliers, such as economic development and demographics.

The theory chapter contains a general description of key aspects of international marketing, which points out the importance of market research. It continues with describing the theories that were chosen to constitute the base of the model used in this study. The chapter also presents the principles for how the collected data was analysed. The chapter ends with presenting the adapted model that guided the empirical part of this study.

Method describes the practical steps of this study, i.e. how it was conducted. The findings are presented in Result and discussed in the Analysis chapter. Possible sources of errors and limitations are raised in the discussion chapter. The last chapter summarises the main findings of the study.

1.6 Customer preferences on wood – A literature review

Although the Egyptian softwood market has not yet been investigated there have been studies made on the importance of service and product quality regarding industrial wood companies in North America, Germany and Norway.

Hansen et al. (1996) constructed a model of total product quality for softwood lumber. The model combined Garvin’s (1984) model of product quality and Parasuraman et al.’s (1988) model of service quality. The model defined five dimensions: “Supplier/Salesperson Characteristics”, “Supplier Services”, “Supplier Facilities”, “Lumber Performance” and “Lumber characteristics”. It was tested on three major customer segments in the US. “Lumber

Characteristics” was rated the most important dimension and “Lumber Performance” the third. Since both are dimensions that are affected by forest management the results indicated, according to the authors, that foresters play a critical role in producing high quality products. “Supplier/Salesperson Characteristics” was rated second most important dimension.

Hansen and Weinfurter (1999) investigated gaps in perception of quality between North American softwood sawmills and their customers. Sawmill respondents were asked to rate the importance of the selected items, and also the performance of their company from a customer perspective. Customers were asked to rate importance and performance of the sawmill. The results indicate that sawmill respondents consistently overrated their performance. The sawmills should improve lumber characteristics such as appearance and clean lumber. It is important for sawmills to identify what services customers demand and to understand that some services are only demanded by specific customers.

Toivonen (2005) examined German wood-trading retailer’s and wholesaler’s perception of importance regarding intangible product quality dimensions. The results indicate that intangible product quality can be described in three dimensions, “Behaviour and Image”, “Serviceability and Environment” and “Reliability”. The study also shows that Nordic suppliers have a weak competitive position compared to e.g. German and Austrian suppliers. The largest difference in performance was found in “Reliability” which was also identified as most important. Toivonen recommended Nordic suppliers to enhance e.g. service and logistics to improve their competitiveness.

Bränngård’s (2011) study revealed that Norwegian building merchants value reliability, flexibility and performance when they review their suppliers. They valued product quality and service quality equally high. This study was made on behalf of SCA Timber and also analysed the competitive performance of that supplier. The result indicated that SCA Timber should improve service and reliability to enhance their competitiveness.

2 The Egyptian Market

Egypt's consumption of softwood is influenced by many factors, which can be categorized in those that affect consumption directly, e.g. demographic and economic changes and those that are harder to measure, e.g. political and overall changes in society. (FAO 2003)

There are many models by which markets can be analysed and many of the factors included in them are reoccurring. This chapter is based on Porter's (1980) five forces of competition framework, the PEST-model (Political, Economic, Social and Technical) and Chopra and Meindl's (2010) factors influencing network decisions. Five factors considered relevant for softwood suppliers were analysed:

- Macroeconomic factors
- Demographic factors
- Political factors
- Softwood consuming sectors
- Competitors

2.1 Macroeconomic factors

Egypt is, after South Africa, the largest economy of Africa. It is a diversified economy and mainly driven by tourism, the oil and gas industry, trade services and agriculture. Previous reforms of the banking sector and low financial market integration with the world resulted in Egypt weathering the global economic crisis in 2008 relatively well. The second and most recent round of the crisis did however affect Egypt to a larger extent. (ADB 2010) Foreign direct investments (FDI) decreased 16.7 %, to USD 6.8 billion between 2009 and 2010, and are down nearly 50 % compared with before the crisis. The majority of the FDI inflows derive from the petroleum refining sector, which in 2010 accounted for 68.8 % of all inflows. FDI's are expected to decrease as long as Egypt is facing the political difficulties and uncertainties that the country currently is. (African Development Bank 2011)

The economic situation in Egypt, measured as GDP per capita, has increased exponentially since 1960 (Figure 4). Between 2004 and 2010 the GDP per capita increased from 1100 USD to 2700 USD (The World Bank 2012). A growing GDP per capita normally leads to an increased demand for housing (FAO 2003). The demand for softwood is therefore, based on the positive trend expected to increase. The total GDP grew at a rate of 5.1 % in 2010, but was well below the 7.2 % level noted before the financial crisis. The economic effects of the downfall of Hosni Mubarak in early 2011 have not yet been revealed, but are estimated to slow growth down to 1.6 % in 2011. (African Development Bank 2011)

Egypt's external debt increased to USD 33.7 billion in 2010, equalling 15.9 % of GDP (African Development Bank 2011). This can be compared to the Swedish debt, which in 2010 equalled approximately 35 % of the GDP (Riksgälden 2012). Interest repayment in general makes countries' economies vulnerable to persistent negative trends, such as economic crisis (FAO 2003).

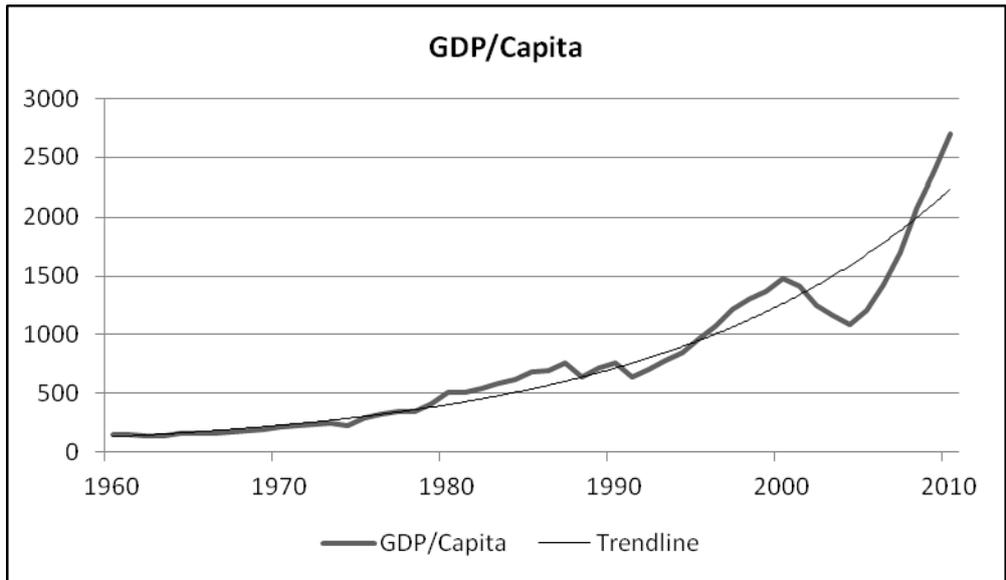


Figure 4. Egypt's GDP/capita (USD) development (The World Bank 2012).

Trade is well developed in Egypt and the country is not as dependent on export of petroleum products as other North African countries. Egypt is one of the North African countries that have made most progress in the manufactured export sector, a lot thanks to a strong textile industry. Efforts have been made to liberalize trade and removing trade barriers. Egypt's partnership in the Euro-Mediterranean Free Trade Zone that entered into force in 2004 is an example of this. The partnership aims to remove trade barriers between Southern-Mediterranean countries and the European Union, e.g. by granting members full exemption of custom fees, charges and other taxes on industrial goods. (FAO 2003 & African Development Bank 2011) The partnership stimulates trade and Egypt's trade deficit with EU increased 3.9 billion Euros between 2006 and 2010 (Figure 5) (European Commission 2012). Egypt is, since 1995, also a member of the World Trade Organization (WTO 2012).

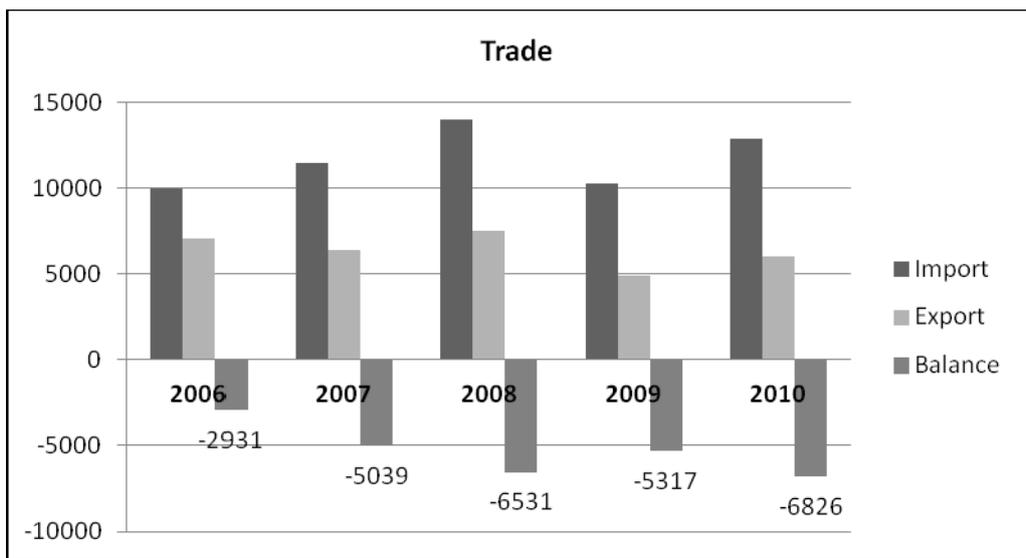


Figure 5. Egypt's trade with the European Union (Million Euros) (European Commission 2012).

Fluctuations in exchange rates impact the profits of any company serving a global market (Chopra & Meindl 2010). Swedish suppliers of softwood active in export to Egypt normally

receive payment in USD. For example the dollar fluctuated between 6 and 8.5 Swedish Krona (SEK) from March 2008 to February 2009 (Figure 6). A supplier that receives payment in USD and has procurement costs in SEK is exposed to the risk of appreciation of the SEK. An increase in the value of the SEK increases the procurement cost in dollars, decreasing profits. However fluctuations also benefit the same company in times when the SEK decreases in value. Exchange rates also affect Egyptian softwood importers, as they have procurement costs in USD and receive payment in Egyptian Pound (EGP). In this case the importers benefit from a strong EGP compared to the USD. The optimal currency situation for a Swedish softwood supplier and an Egyptian importer is when the SEK is weak compared to the USD at the same time as the EGP is strong compared to the USD.

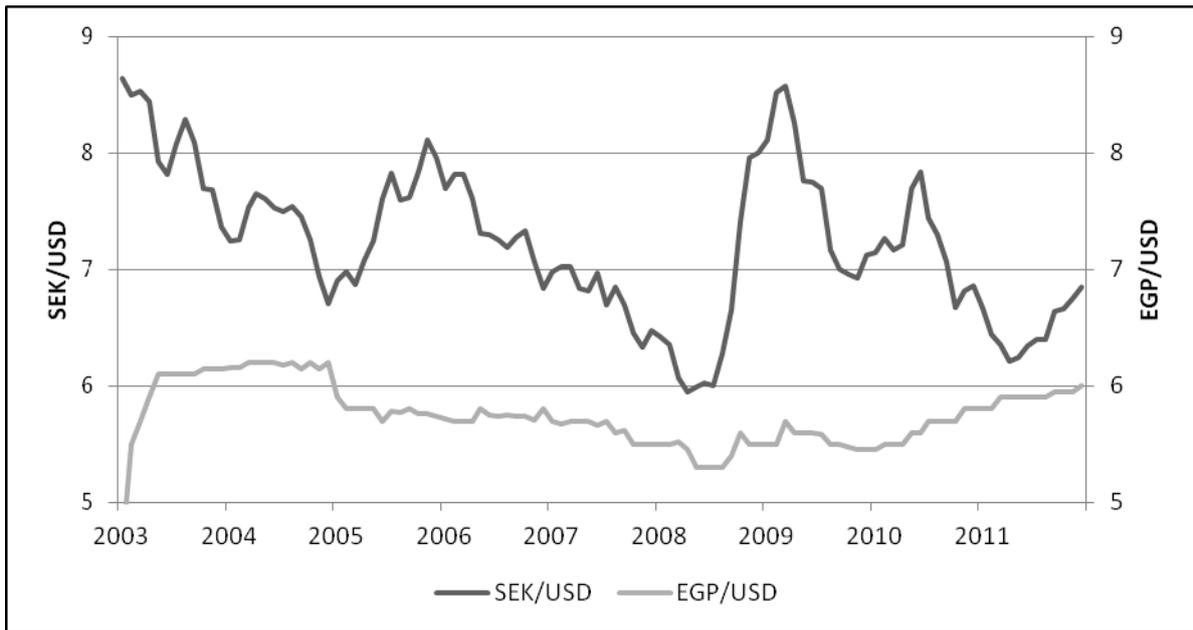


Figure 6. The development of SEK/USD and EGP/USD (Sveriges Riksbank 2012 & XE 2012).

2.2 Demographic factors

In 2010 Egypt's population was 81 million and grew at a rate of 1.7 %. The population is projected to increase to over 90 million in 2020 (Figure 7). With vast areas of the country being arid, the majority of the population is concentrated along the Nile and delta, resulting in a high population density. The population shows a high demand for wood products and a growing population means an increased demand for softwood. (FAO 2003 & The World Bank 2012) As a result from the natural conditions mentioned above Egypt is one of the most urbanized countries in Africa (FAO 2003). In 2010 the urban population was over 35 million, equalling over 40 % of the total population. The urban population is projected to be 44 million in 2020 (Figure 7) (FAO 2012). With a growing urban population the demand for construction materials, including softwood can be expected to increase (FAO 2003).

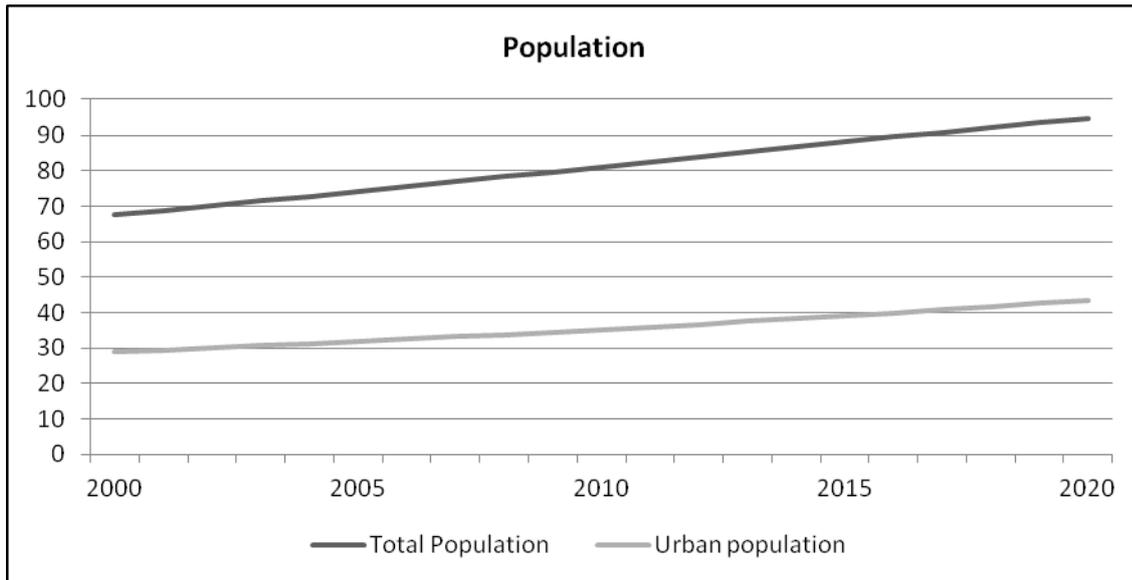


Figure 7. Development of Egypt's total population and urban population (Millions) (FAO 2012).

Approximately 33 % of Egypt's population is below the age of 15 (CIA 2012). As this young population becomes adults they will affect society in many ways. It will lead to a change in values and perceptions in regard to the older generation, increased literacy and education. (FAO 2003) One important step of becoming an adult is moving to a new home and the state of Egypt's age pyramid therefore speaks for an increased future housing demand. The Swedish population grew at a rate of 0.9 % in 2010 and 15.4 % of the population were below the age of 15 (CIA 2012 & The World Bank 2012). Comparing Egypt's figures to Sweden's shows how young and dynamic the Egyptian population is.

2.3 Political factors

Inspired by the previous events in Tunisia erupting in December 2010, the Egyptians protested and demanded political change. Elections in 2010 that claimed majority for Mubarak's government triggered the revolution. Killings took place before power was handed to the Supreme Council of the Armed Forces. In February 2011, after 30 years in power, the downfall of Hosni Mubarak was a fact. This could be the start of a shift from an authoritarian regime to a democratic government. However transitions like these are slow and bring many uncertainties for the future. Dissatisfaction is starting to grow again and people are concerned that the military will rule the country indefinitely. (African Development Bank 2011).

The Egyptian revolution exemplifies how quickly conditions change and demonstrates the uncertainty associated with Egypt as a country, and also as a trading partner. U4M experienced this during the revolution in 2011 when sales temporarily ceased completely. The long shipping distance made the situation even more complicated as vessels were on their way to Egypt when the revolution erupted. (Veckans Affärer 2011) The Belgian Export Credit Agency provides risk assessments of countries, including Egypt. The political risk associated with export transactions is valued 5, on a scale reaching from 1 to 7 (1 is the lowest risk and 7 is the highest). The war risk is valued 4 and the transfer risk 3 (The Belgian Export Credit Agency 2012).

2.4 Softwood consuming sectors

This section analyses the two sectors identified as the main drivers of softwood consumption, the construction sector and the furniture industry. The construction sector is most important as it not only consumes softwood itself, but also increases the demand for other softwood products, such as windows and doors.

2.4.1 The construction sector

Egypt's construction sector is rapidly growing and is one of the country's main drivers of economic growth (Figure 8). In 2009 it contributed to 4.6 % of the GDP and expanded by 13.2 %, making it the second fastest growing sector after telecommunications. (African Development Bank 2011) The sector's importance can further be explained by the fact that it boosts related industries such as cement, iron, furniture and electricity. In 2010 the construction sector accounted for about 8% of the total employment in Egypt, with a workforce of approximately 1.2 million. The sector proved to be robust as it continued to grow despite the global economic crisis. (Developing 8 2010)

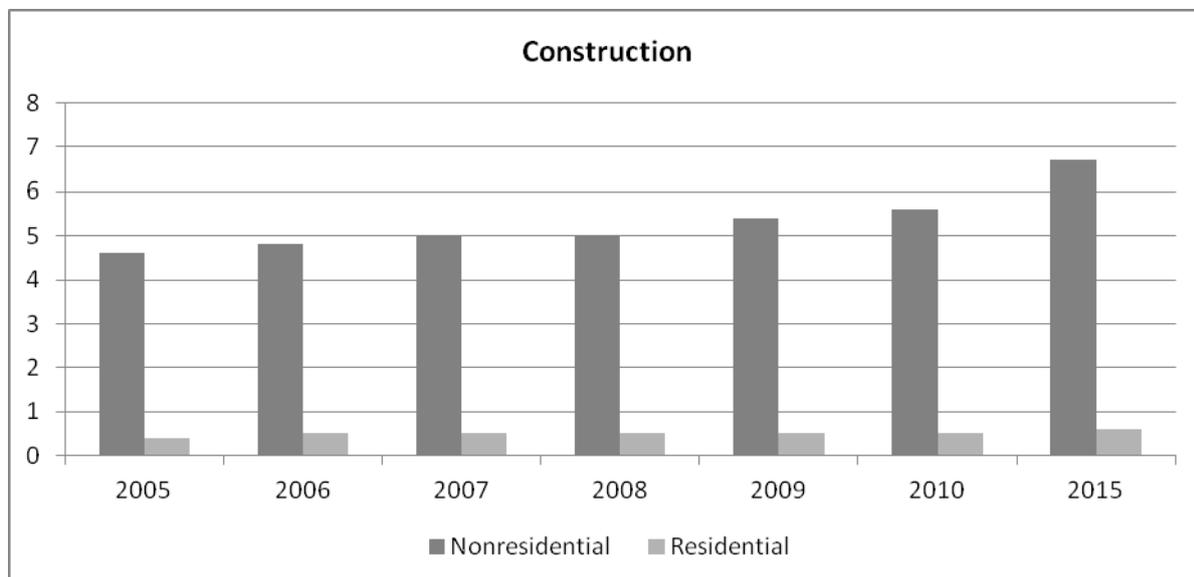


Figure 8. Construction expenditures (USD billions) in Egypt (2010 & 2015 figures are projections) (Global Insight, Inc. 2010).

The majority of the construction expenditures are categorised as non-residential (including infrastructural and structural construction). Spending in this sub-sector grew from 4.6 to 5.4 USD billions between 2005 and 2009. The growth is explained by structural and infrastructural mega-projects that require softwood for e.g. site preparations and piling (Global Insight, Inc. 2010).

The residential construction expenditures are, compared to non-residential expenditures, negligible (Figure 8). They are estimated to increase from 0.5 to 0.6 USD billions between 2010 and 2015. The increase is partly explained by a planned governmental program, aiming to create 400 new villages in the Nile valley. (Global Insight, Inc. 2010) Other factors supporting the projected increase in non-residential construction are Egypt's growing population and the government's initiatives to improve housing finance. (Developing 8 2010)

Even though the Egyptian construction sector is projected to grow there are limiting factors, e.g. the high risk associated with the country and the scarcity of skilled labour. (Global

Insight, Inc. 2010) The issuance of construction permits is another limiting factor. The administrative procedures required for construction permits are many and complicated, making the process long. During 2010 the government pursued structural reforms to improve the business climate, e.g. by easing the issuance of such permits. (ADBG 2010) Despite the improvements construction permits still remain a problem. (African Development Bank 2011)

2.4.2 The furniture industry

Egypt has a long history of wooden furniture production, influenced by the French and British colonial periods. The industry is characterised by labour-intensive woodcarving and veneer inlaying methods. These methods require diverse species of sawnwood, veneer and wood-based panels as raw material. Beech is by far the most common species used for furniture production, whilst softwood is usually used for producing doors and windows. The wooden furniture industry accounts for 0.3 % of Egypt’s total industrial output, and plays a relatively small role in the country’s overall industrial activity. (ITTO 2004 & Egyptian Furniture Export Council 2010)

Despite the long history of furniture production it is during the last decade that the Egyptian furniture industry has truly expanded. Local consumption has grown, combined with increased exports mainly to MENA-countries (Figure 9). Between 1999 and 2010 the production increased from 288 to 934 USD millions. Between 2005 and 2010 the exports increased from 48 to 255 USD millions, and the imports from 77 to 139 USD millions. (Egyptian Furniture Export Council 2010) The large increase of production and export between 2005 and 2007 was the result of a production shift, from classic to modern furniture, more suitable for large-scale production and thereby more price competitive. (The Daily News Egypt 2007)

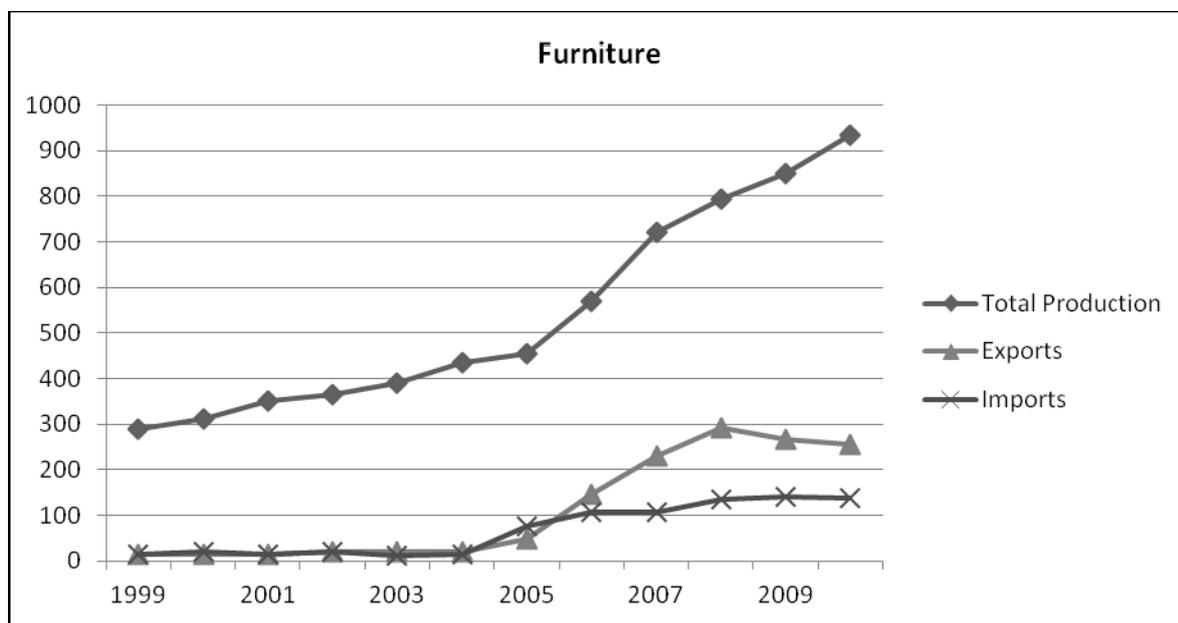


Figure 9. Egyptian furniture production, export and import (USD Millions) (Egyptian Furniture Export Council 2010).

The Europeans encouraged the furniture industry’s development in the port city of Damietta (*Dumyāt*), during the colonial periods. Today Damietta contains a cluster of furniture industries and competence. 36 % of all Egyptian furniture establishments are currently located in Damietta, accounting for approximately 40 % of the produced furniture. The remaining output mainly originates from establishments in Cairo and Alexandria. The current furniture

sector employs 350 000 workers across 120 000 establishments. The ratio between workers and establishments indicates a large degree of fragmentation, which is one of the industry's major hurdles. The average workforce is smaller than three workers and family owned business models dominate the industry. Approximately one-half of the production consists of bedroom furniture, making it the largest segment. Products for domestic household, garden furniture, furniture finishing and reparation are other major segments. (ITTO 2004 & Egyptian Furniture Export Council 2010)

In 2009, 11 out of Egypt's top 15 furniture export destinations were MENA-countries and the potential for increased exports to European markets is thereby largely unrealized. The MENA-countries aesthetic tastes are aligned with Egyptian furniture, which partly explains these countries' predominance as importers. Another important factor is the geographical and cultural proximity. Saudi Arabia is the largest importer, accounting for 23 % of the exports. Italy is the largest European importer, accounting for 6 % of the exports. As domestic consumption and exports have grown, imports have grown to fill the gap between production and consumption. China is the dominant source of imports, with a market share of 39 %. (Egyptian Furniture Export Council 2010)

Key strengths and weaknesses can be identified when analysing the Egyptian furniture sector's competitiveness (Table 1).

Table 1. Strengths and weaknesses of the Egyptian furniture industry. Based on findings in (Egyptian Furniture Export Council 2010)

Strengths	Weaknesses
+ The existence of strong woodworking know-how.	– Fragmented industry with limited number of large-scale manufacturers.
+ Having geographical and cultural proximity to primary export markets.	– The lack of scale and visibility prevents international buyers to choose Egypt as a supplier.
+ Flexible and short turn-around time. Possible because of cost advantages, allowing e.g. custom made production series.	– Limited quality appreciation and variation in produced furniture, resulting in customer dissatisfaction and poor international reputation.
+ Beneficial cost structure, based on low labour and shipping cost.	– Low copyright protection and unstable business environment stunts foreign investments.
+ Strong governmental support aiming to develop the industry, e.g. establishment of The Egyptian Furniture Export Council.	– Low labour productivity, reducing the cost advantage, caused by lack of formal training opportunities.

Furniture exports are targeted to grow to 1.6 USD billions and the domestic demand to 2.7 USD billions by 2015. The growing middle class and large planned projects support this target (ITTO 2004). In order to meet these targets it is crucial to consider the limiting factors, and e.g. increase the number of large-scale producers in Egypt. (Egyptian Furniture Export Council 2010)

2.5 Competitors

Sweden is one of the leading softwood suppliers in Egypt. However Russia and Finland are suppliers of the same magnitude as Sweden. In 1998 Sweden and Finland had a combined market share of 72 % of the Egyptian market, but Russia was able to advance its market share by price competing. The Nordic supplier's market share decreased to 35 % by 2004, and Russia became dominant. (United Nations 2005) In 2007 Russia exported 2 million m³, Finland 0.6 million m³ and Sweden 0.25 million m³ to Egypt (Figure 10). The Russian volumes peaked in 2007 and the country has since then lost market shares to the Nordic suppliers. In 2011 the Russian volumes had decreased to 1.1 million m³, and during the same year the Nordic suppliers exported 1.6 million m³. Sweden has since 2008 been the second largest supplier in this market. This increase can be explained by two factors. One is Gudrun, the storm that fell massive volumes of timber in 2005. This made the oncoming years beneficial for Swedish sawmills as the timber prices decreased. The other explanation is the weak SEK that was beneficial for Swedish exporting companies (Figure 6).

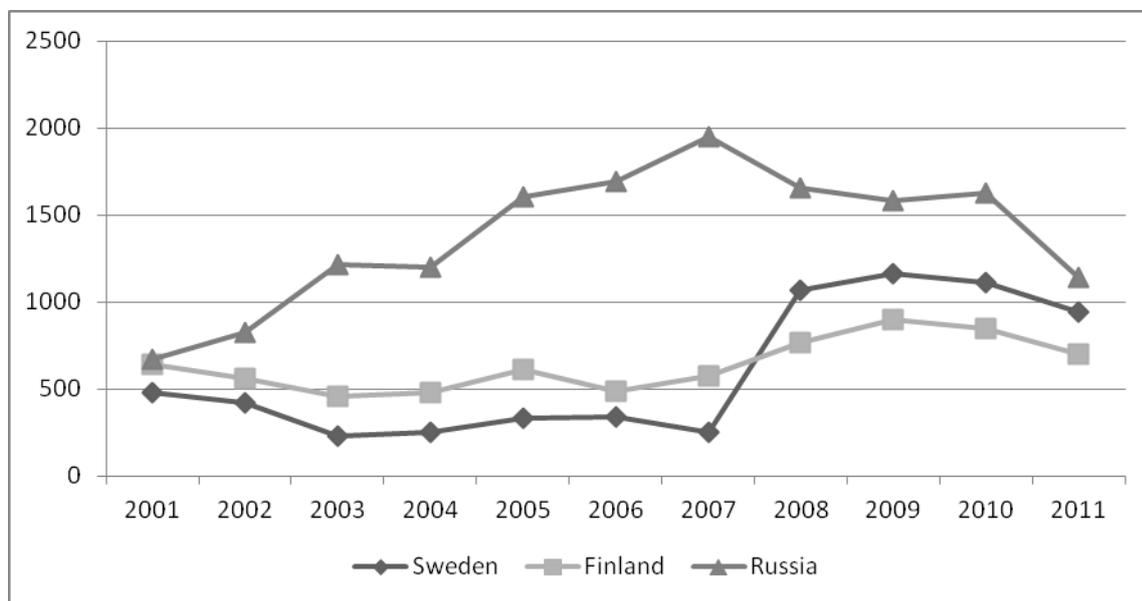


Figure 10. Swedish, Finnish and Russian softwood export destined to Egypt (1000 m³) (No data reported for December 2011) (Skogsindustrierna 2012).

All three suppliers are diplomatically represented by embassies in Egypt, which is important for the relationship between the supplier and Egypt. The Swedish trade council, an organisation that assists Swedish exporting companies are represented in Cairo. The Finnish counterpart of this, Finpro, is not represented. Sweden, Finland and Egypt are members of the World Trade Organisation, whilst Russia is listed as an observer (WTO 2012).

There are numerous Swedish companies that export softwood to the MENA-region. None of them are completely focused on this region as U4M, however they are considered to have substantial market shares in Egypt. Since most of these companies are not listed on the public stock exchange there is little information available about them. Therefore they are not further commented.

3 Theoretical framework for the study

3.1 Introduction

This chapter presents theories on product quality - definitions and dimensions. Delivery of physical products is increasingly associated with services, making it crucial to include both the physical product and its associated services when analysing product quality. This is of particular importance to softwood, since it is a commodity that differs little regardless of manufacturer. The factors that affect customer's perception of softwood quality are likely to depend on service to a large extent (Hansen et al. 1996). The quality section starts with presenting theories of product quality and service quality. This is followed by a theory called "The offering", which includes both product and service quality and thereby explains product quality from a broader perspective. This concept was used to identify what characterises a good supplier, according to the importers.

Importance-performance analysis (IPA) (Martilla and James 1977) was chosen to illustrate the customer's perception of quality and U4M's competitiveness. The benefit of IPA is that it in a simple way illustrates the perception of the complex concept of quality. This model can be questioned, which is explained by the KANO-model (Matzler, et al. 2004). The weakness of IPA is that it does not regard the fact that importance may depend on performance.

Since one of the objectives is to identify sources of competitive advantage, a framework called VRIO (Barney 1995) was chosen. There are many other theories that can be used for analysing this, such as Porter's (1980) five forces and SWOT-analysis. However VRIO includes the company's internal resources and capabilities. VRIO was chosen since it is known that analysing only the company's external environment is not enough to identify sources of competitive advantage (Barney 1995). Another reason for choosing VRIO was that the external environment was already analysed in The Egyptian market chapter.

3.2 International marketing

In a world that is becoming more globalized it is important that companies expand into international markets and take advantage of global market opportunities. The expansion is crucial in order to keep pace with competitors and to maximize the full potential of their product mix. (Lascu 2008)

International marketing is defined as "the process involved in the creation, production, distribution, promotion, and pricing of products, services, ideas and experiences for international markets". International marketing research is defined as "the systematic design, collection, recording, analysis, interpretation and reporting of information pertinent to a particular marketing decision facing a company operating internationally". (Lascu 2008)

International companies can be oriented in two basic ways, polycentric or regiocentric depending on how they view the world. Polycentric companies are aware of the importance of individual markets, and assume that each market is unique and should be addressed individually. Regiocentric companies view world regions as distinct markets, because they share economic, political and cultural traits. These companies assume that the individual markets within a region will respond to a regional marketing approach. (Lascu 2008) U4M operates in MENA-countries that in many ways are similar to each other and can thereby be classified as a regiocentric company.

3.3 Quality

Quality is a complex concept, often associated with confusion. Companies and their employees often fail to communicate exactly what they mean with it. The absence of a distinct definition often results in debates that counteract quality-improving actions. (Garvin 1984) The complexity of the term has led to the origin of theories that analyses product and service quality from a broad perspective. Three of these theories were used in this study, Garvins (1984) model of product quality, Parasuraman et al.'s (1988) model of service quality and Ford et al.'s (2006) theory "The offering".

3.3.1 Product quality

Garvin (1984) analysed varying definitions of product quality, derived from philosophy, economics and marketing and operations management. The result was an eight dimensional framework, out of which product quality can be explained:

1. Performance: Describes the operating characteristics of a product. Individual preferences often determine whether performance differences are perceived as quality differences. For softwood, a performance characteristic could be occurrence of knots.
2. Features: The non-essential characteristics that enhance the quality. This dimension is also affected by individual preferences. An example of a feature could be how softwood is packaged.
3. Reliability: This dimension describes the probability of product failure. This is relevant, especially for durable products and not as much for products that are consumed instantly. For construction softwood it could be how reliable the values of strength are.
4. Conformance: Whether the product meets its design and operating standards. Neither conformance nor reliability are based on individual preferences and are therefore regarded as objective measures of quality.
5. Durability: Measures product lifetime. For products such as softwood, that successive deteriorates, it is defined as the use one gets before replacement is regarded as preferable to repair or maintenance.
6. Serviceability: Speed, courtesy and competence of repair.
7. Aesthetics: How the product looks, feels, sounds, tastes or smells. Together with perceived quality this is the most subjective dimension.
8. Perceived Quality: The consumer's opinion of the product after he or she has been affected by images, advertising or brand names. This dimension is a result of the fact that the consumers do not always hold complete information about the product's attributes.

3.3.2 Service quality

Since Garvin's model focuses on the physical product it was complemented with Parasuraman's (1988) service theory named SERVQUAL.

Three features characterize service, according to Parasuraman: intangibility, heterogeneity and inseparability of production and consumption. These features make service quality an abstract concept. Parasuraman developed an instrument for measuring customer perceptions of service quality. It is a multiple-item scale consisting of five dimensions:

1. Tangibles: Physical facilities, equipment, and appearance of personnel.
2. Reliability: Ability to perform the promised service dependably and accurately.
3. Responsiveness: Willingness to help customers and provide prompt service.
4. Assurance: Knowledge and courtesy of employees and their ability to inspire trust and confidence.
5. Empathy: Caring, individualized attention the firm provides its customers.

Despite service quality being an abstract concept because of the characteristics mentioned above this theory and its dimensions enable an evaluation of customer perceptions of it.

3.3.3 The offering

Ford et al. (2006) defines a supplier's offering as "a promise to a customer that addresses a particular problem of that customer". The offering includes both product and service quality and consists of five elements:

1. Product: Represents the physical part of an offering, i.e. the tangible and visible part. Because it is the most obvious element of an offering, customers and suppliers often wrongly consider it to be the most important. The product can just as well be relatively unimportant in solving customers problems, compared to other elements. The product has practically no real value itself, the value is realised only when the product contributes to the solution of a problem.
2. Service: The product element often has little value without it being associated with services. For example a product such as construction timber is likely to increase in value if a company that accepts varying order quantities sells it.
3. Advice: The activities of a supplier, which aims to increase the customer's understanding of its problems and of the supplier's offerings and abilities. The importance of this element depends on the customer's uncertainties. Advice in brochures and websites may be sufficient when customers show low uncertainty. On the other hand advice is more important for customers with high uncertainties and complex problems. In these situations the value of advice can far outweigh the importance of e.g. low price
4. Delivery: Where, when, how and in what form offerings is transported to the customer. This is often crucial to solving customer's problem, and is particularly important when a company delivers products that are undifferentiated from competitor's products, such

as softwood. Suppliers can gain competitive advantage by offering customers logistical solutions like “just-in-time” delivery.

5. Costs and price: Price is often only a fraction of the customer’s total cost of obtaining an offering. Costs of working with the supplier and of integration are also related to the procurement. Therefore it is important to regard the full costs of offerings when comparing different companies. The price that a customer is willing to pay is related to the importance of its problem, the extent to which the offering may solve it and to what the customer sees as the full cost. Because customers evaluate price from the problem solving potential of the offering, and not the supplier’s costs, a supplier can reduce costs without customers being less willing to pay.

3.4 Important-Performance Analysis (IPA)

IPA is a method used to analyse what customer’s value regarding product and service quality. The analysis also defines how well the company fulfils these requirements and is based on a two dimensional matrix that forms four quadrants (Figure 11). On the x-axis the company’s performance (satisfaction) is measured and the y-axis measures what the customer’s puts importance to. The studied attributes are then, based on the customers answers, positioned in the matrix’ four areas: (Martilla and James 1977)

- A. Concentrate here: The customer’s value these attributes, but the company’s performance is not fulfilling their requirements.
- B. Keep up the good work: The customer’s value these attributes, and the company is rated high in performance.
- C. Low priority: The customer’s don’t value these attributes notably, at the same time as the company’s performance is low.
- D. Possible overkill: These attributes are rated high in performance but low in importance. Resources committed here would be better used elsewhere.

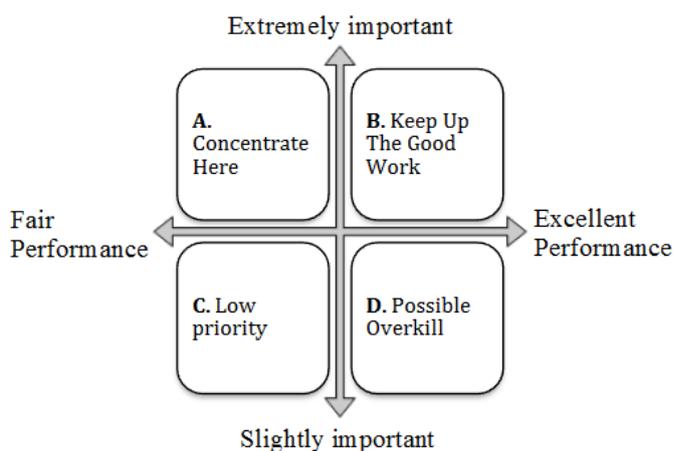


Figure 11. Importance-Performance Analysis Matrix (Martilla and James 1977).

3.5 Analysing Resources and Capabilities - VRIO

VRIO stands for Value, Rareness, Imitability and Organisation. It originates from the much more general resource based view. The model was developed by Barney (1995) to analyse the competitive implications of a firm's internal strengths and weaknesses. In order to understand the sources of sustainable competitive advantage one must regard both external and internal factors (Barney 1995). VRIO was considered to be a suitable model for answering the study's objective of identifying sources of competitive advantage.

A firm's internal attributes – its strengths and weaknesses, is also referred to as its resources and capabilities. These are defined as all the financial, physical, human, and organizational assets of a firm. When analysing resources and capabilities four questions must be addressed:

1. The question of value: Does the firm's resources and capabilities add value by enabling it to exploit opportunities and/or neutralize threats? Even though resources and capabilities have added value in the past, changes in e.g. customer taste can make them less valuable in the future.
2. The question of rareness: If numerous competitors possess a resource and capability it is unlikely to be a source of competitive advantage. Instead, it is a source of competitive parity. Valuable and rare resources and capabilities can be used to gain temporary competitive advantage.
3. The question of imitability: Competitors can imitate in two ways: duplication and substitution. Duplication is when a firm builds the same kind of resource. Substitution is when the imitating firm chooses to develop another resource with the same strategic implication as the one it is trying to imitate. If competitors face a cost disadvantage in imitating the valuable and rare resources and capabilities, then the firm that possesses them can obtain sustainable competitive advantage. Resources can be costly to imitate because of: the importance of history, the importance of numerous small decisions, and the importance of resources that are socially complex when creating them.
4. The question of organisation. A firm must be organised in a way that enables it to exploit its resources and capabilities. Formal reporting structure, explicit management control systems and compensation policies are relevant components of this question. These are called complementary resources because they have limited ability to generate competitive advantage in isolation. They need to be combined with other resources and capabilities and thereby realise a firm's full competitive advantage.

3.6 Three-factor theory of customer satisfaction

Matzler et al. (2004) questions the applicability of IPA as it does not regard the fact that importance depends on performance, which means that a change of performance may be associated with a change of importance. Research suggests that quality attributes fall into three categories: basic factors, excitement factors and performance factors. Kano's (1984) model is based on these categories and it also assumes that the relationship between performance and importance of basic and excitement factors is nonlinear and asymmetric (Figure 12).

Basic factors do not lead to customer satisfaction if fulfilled but are minimum requirements that cause dissatisfaction if not fulfilled. Customers consider them as prerequisites and take them for granted. (Matzler, et al. 2004). An example of a basic factor may be the price that a customer is willing to pay for a product.

Excitement factors increase customer satisfaction if delivered but do not cause dissatisfaction if they are left out. Excitement factors are associated with surprise and lead to “delight”. (Matzler, et al. 2004) An example of an excitement factor may be a company’s ability to handle short-notice orders.

Performance factors generate satisfaction if performance is high and dissatisfaction if performance is low. These factors show a linear and symmetric relationship between performance and importance. (Matzler, et al. 2004) An example of a performance factor may be delivering on time.

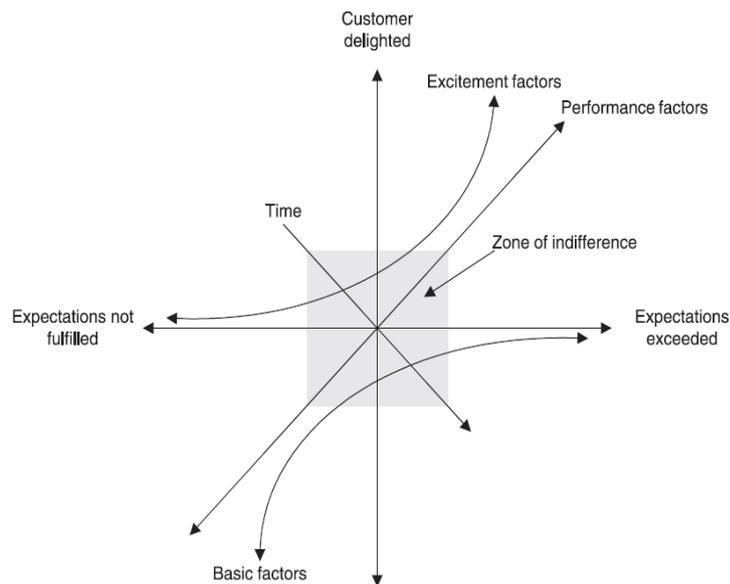


Figure 12. Three-factor theory of customer satisfaction, the time-arrow illustrates how excitement factors with time becomes performance factors, and finally becomes basic factors (Matzler, et al. 2004).

3.7 Theoretical model for the study

The three quality theories described above, has together with the articles described in “Literature review” formed the outline for this study’s theoretical model (Figure 13). The model was constructed to in the best possible way meet the study’s objective. Information from U4M was also considered when constructing the model. The model consists of six dimensions used for constructing the interviews and questionnaires:

1. Softwood Performance
2. Perceived Quality
3. Reliability
4. Responsiveness
5. Assurance
6. Supplier Services

These dimensions formed the base for the areas of questions for the interviews and questionnaire. The interview result identified what characterises a good supplier, and what the importer’s need. They also defined U4M’s performance and revealed their competitiveness. The needs and performance were analysed according to the VRIO framework to identify sources of competitive advantage for U4M. The questionnaire results were analysed with IPA, to provide a quantified picture. This quantification was done mainly to identify U4M’s strengths and weaknesses.

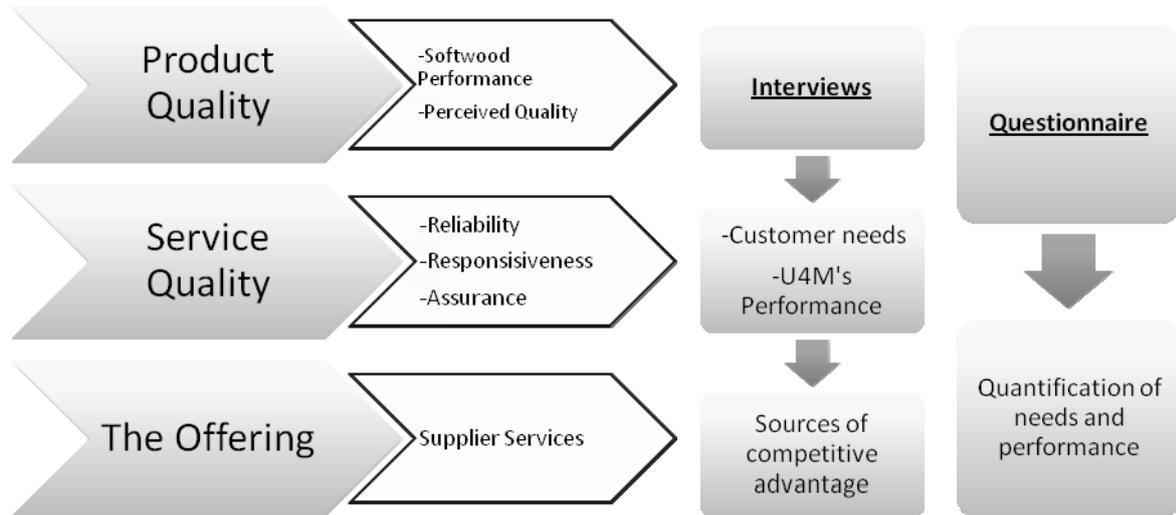


Figure 13. The theoretical model used in this study.

By combining these theories in the model both product and service quality could be investigated. Since three theories were used it was possible to identify six dimensions that were considered to be relevant for the Egyptian softwood market. All dimensions but Softwood Performance is named after their original name. Softwood Performance corresponds to the dimension which Garvin (1984) referred to as “Performance”.

4 Method

4.1 Approach

All studies can be classified as exploratory, descriptive or casual. Exploratory research is used when there is little prior knowledge and is characterised by being flexible and qualitative. Descriptive research provides a picture of some aspect of the market. The aim of causal research is to show that one variable determines the value of others. (Aaker, Kumar and Day 2001) This study can be categorised as two of these categories. The identification of what the customers' value is mainly exploratory research. The evaluation of U4M's competitiveness, and the identification of possible sources of competitive advantage is categorised as descriptive research. In addition there is a degree of casual research associated with the study since it investigates what factors that determines quality according to the importers.

The most general distinction of data is made between secondary and primary data. Secondary data are already available because they were collected for an earlier purpose. Primary data are collected to a specific study. (Aaker, Kumar and Day 2001) Because of the absence of earlier studies addressing the subject, primary data was collected. Choosing primary sources also ensured control of the data's composition and quality. The Egyptian market chapter was however based solely on secondary data. This was collected from as well known, trustworthy and up-dated sources as possible, such as The World Bank and FAO. Even though the sources were selected carefully there is a risk of error existing, especially because Egypt is going through a turbulent period.

There are numerous ways of collecting primary data, such as qualitative interviews and surveys. It is important to match the collecting method to the type of study being conducted. Qualitative methods are appropriate for exploratory studies, whilst surveys are appropriate for descriptive studies. (Aaker, Kumar and Day 2001) Since the study is exploratory and descriptive both methods for collecting data was used. The qualitative method was done by face-to-face interviews, aiming to capture the importers opinions in words. The survey method was conducted by using a questionnaire, aiming to collect data for the IPA. Complementing the qualitative method with a survey also provides the study with numerical data that is easier to analyse (Aaker, Kumar and Day 2001).

4.2 Interviews

Qualitative interviews are useful when you want to investigate soft values, such as what characterises a good supplier (Trost 2005 & Ejvegård 1996). As the main objective of this study was to capture and describe specific customer's opinions in words, the most appropriate method was considered to be qualitative interviews. The advantages of qualitative interviews are that the respondents are allowed to express and explain further comments to the questions and that the interviewer can ask follow-up questions (Denscombe 2010). The lack of prior studies of the Egyptian softwood market made it important to capture these additional comments.

Standardization refers to the degree of uniformity regarding questions and situation for the respondents. High degree of standardization means that interviews vary little or not at all and is useful when conducting quantitative studies. The opposite is low degree of standardization which means that the interviewer formulates his language after the respondent's and asks the questions in the order that suits the respondent. This type of interview enhances the variation potential. (Trost 2005) To minimize the risk of misunderstandings and to make the

respondents comfortable, low degree of standardization was chosen. To capture as much information as possible the respondents were allowed to answer freely. The risk of misunderstandings was also minimized by combining the interviews with the questionnaire. When conducting qualitative interviews it is useful to construct a “guide” that the interviewer follows (Trost 2005). In this study the questionnaire was used as a guide (Appendix 1).

4.3 Questionnaire

The questionnaire was constructed together with U4M and Unirets (Appendix 1). As described above it was also used as an interview guide. It was constructed with a high degree of standardization, meaning that all respondents were given identical questionnaires (Trost 2005). The questions were closed-ended and the respondents gave their answer on a five graded rating scale, based on two aspects, importance and U4M’s performance compared to their competitors (relative performance). There are many advantages with this type of questionnaires, e.g. that they take less time to answer than open-ended questions and facilitates the analysis (Ejvegård 1996). It is important to be aware of this method’s limitations as well, e.g. that respondents tend to choose a middle alternative when they don’t agree with any of the options at the scale (Aaker, Kumar and Day 2001). The main objective of the questionnaire was to provide quantitative data to the IPA. To ensure that the questionnaire would obtain the information that is required a pre-test was conducted according to Aaker, Kumar and Day (2001). An Arabic questionnaire guide that was used when the respondents had difficulties to understand the questions was also constructed (Appendix 2).

4.4 Investigated dimensions

Six quality dimensions were identified based on Toivonens’s (2005), Hansen et al’s (1996) and Bränngård’s (2011) study. 26 questions within the six dimensions were formulated together with U4M:

Softwood Performance

- Absence of wane.
- Absence of knots.
- Absence of twist.
- Absence of discoloration.
- Products being delivered undamaged.
- Packages being marked (BL-Marking) in a good way.
- Supplier providing products within a wide range of quality.
- Supplier providing required lengths.

Perceived Quality

- Supplier being well-established.
- Supplier having a good reputation.
- Supplier being large.

Reliability

- Delivery made just-in-time.
- Delivered products equal what was ordered.
- Supplier keeping promises.
- Supplier submitting accurate invoices.

Responsiveness

- Supplier being able to handle unpredicted orders.
- Supplier quickly solving problems.
- Supplier taking responsibility for orders that does not fulfil expectations.
- Supplier informing about problems once they occur.
- Supplier visiting us.

Assurance

- To have a personal relation with the supplier.
- Supplier understanding your ethics, customs and norms.

Supplier services

- Supplier's logistical solutions meeting your requirements.
- Supplier accepting varying order quantities.
- That it is easy to contact the supplier.
- Delivery frequency.

4.5 Sample

Sample refers to the respondents that were chosen to be included in the study. This study's sample was chosen according to a method called judgemental sampling (Aaker, Kumar and Day 2001). Unirets manager was chosen to select the sample. One reason for using this method was that the importers could not be contacted directly. Another reason was the fact that Unirets manager has the best knowledge about who could be asked to participate in the study.

Although the sample selection was done by Unirets manager, it was done in dialog with U4M and the author. The sample was restricted to only include importers located in Alexandria. In addition to this they had to be current customers to U4M and/or Unirets. Spreading was strived after concerning the size of the importers.

4.6 Data collection and analysis

The study comprised seven interviews with importers during April 2012. Six of the importers filled in the questionnaire in addition to being interviewed. The reason for not letting all importers fill in the questionnaire was that one of them was not a customer of U4M and therefore could not rate U4M's performance. There were ten meetings prearranged initially but three of the importers could not participate when the time came. The interviews took between 40 and 90 minutes and started with an introduction to the subject and the study's purpose. To minimize the risk of misunderstandings caused by linguistic factors, an Arabic and English speaking employee of Unirets assisted the interviews. The qualitative questions were discussed one by one. After each question being discussed the importer filled in his answer on the questionnaire before starting the discussion of the next question. All respondents were men and none minded being audio recorded.

There are no established procedures to follow when analysing data from qualitative interviews (Trost 2005). Notes were taken during the interviews, which were also audio recorded. The notes and recordings were coordinated, resulting in a summary of each interview. Each summary was then analysed to identify tendencies and differences between the respondent's opinions. These findings were used to identify what the importers value and why, but also to evaluate U4M's competitiveness. Quotations that were considered to enhance the readers understanding of the findings were also identified.

The questionnaires resulted in qualitative data revealing the importance and U4M's performance on each question. Mean values of the importance and performance ratings were calculated in excel. These values were the input data for the IP-diagrams that were constructed. These diagrams quantified the importance and performance of each question and thereby complemented the qualitative results in an appropriate way. The diagrams were analysed in order to identify U4M's strengths and weaknesses.

VRIO was used to identify sources of competitive advantage. This part of the analysis utilized both the qualitative and quantitative data. Questions that were rated high in importance were translated to valuable questions, which is the first question of VRIO. These questions were then analysed based on the remaining questions of VRIO - Rareness, Imitability and Organisation.

4.7 Accuracy

The quality of a study can be judged according to certain criteria, whereof three are relevant for this study: construct validity, external validity and reliability (Yin 2003).

- Construct validity is defined as using correct measures for what is being studied. This parameter of accuracy is increased by using multiple sources of evidence, establishing a chain of evidence and by having the draft of the study reviewed by key informants.
- External validity deals with knowing if a study's findings can be applied beyond the specific study.
- Reliability refers to ensure that another researcher can follow the same procedures as described in the method.

These accuracy measures are crucial for the verification of any study and its findings (Denscombe 2010). In order to obtain construct validity, the questionnaire was constructed in consultation with U4M. Regarding external validity, the findings are likely to be applicable on other MENA-countries. The reason for this is that these countries share the same base for law systems, language, cultural similarities and geographical proximity (Lascu 2008). Reliability is ensured by the detailed description of chosen research methods, presented in this chapter.

5 Result

5.1 Trade flow

U4M procures softwood in form of specifications from their owner's sawmills. Each specification contains varying quantities of different products that differs based on dimension, length and quality. The average sawmill specification contains 4000 m³ and U4M divides these into smaller ones, still containing varying products. The products are sold to the importers in form of the smaller specifications, containing 1000-1500 m³ in average. Mainly 5th, 6th and 7th grade products are demanded in Egypt. 7th grade products are consumed by the construction sector where they are used for moulding forms and scaffolds. 5th and 6th grade are used for producing e.g. furniture and doors. The demand is and has always been high for 7th grade products. The historical demand use to be higher for 6th compared to 5th grade, but these grades are currently equally demanded.

The shipping process from Sweden to Egypt can be divided in six phases (Figure 14). Loading the vessel in Sweden is usually done at several ports and can take up to one month. The vessel which is hired by U4M then goes directly to the port of Alexandria. Barges are used, as it is not possible to unload the packages directly on land. The barges can hold 400 m³ and are towed by small boats hired by the importers. Organising the packages is the most time consuming process for the port workers. This is done in the port and means that the buyer of each package is identified. The final transport to the yards is made with trucks, hired or owned by the importers.

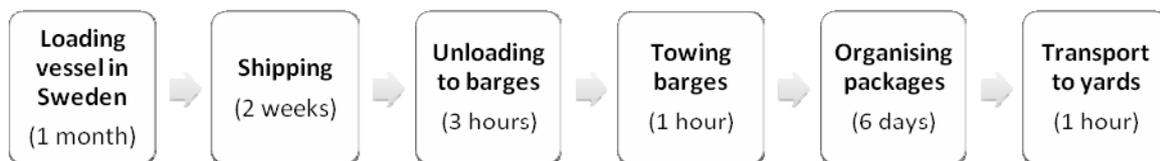


Figure 14. The shipping process and approximate time requirement/phase.

The importers normally sell products directly to end-consumers. The sold quantities vary from a couple of cubic meters to fully loaded trucks. Most of the softwood is consumed by the construction sector in Alexandria and Cairo. This sector requires large volumes of softwood even though Egypt has no tradition of wooden house-building. This is because construction scaffolds are built in softwood and because moulding is done at the construction sites, in softwood forms (Figure 15 & 16).



Figure 15. Softwood scaffolds in Alexandria.



Figure 16. Construction site in Alexandria.

5.2 Description of the interviewed importers

Seven importers were included in the study and together they purchase 990 000 m³ per year (Table 2). Their combined volumes equal 22 % of Egypt's total softwood import in 2011 (Figure 3). The importers were classified based on annually purchased volume as small ($\leq 60\,000$ m³/year), medium (60 000-100 000 m³/year) and large (>100 000 m³/year). The companies were located in a wood-importer area full of other softwood importers. The offices were located at the wood yards, meaning that the yards were visited after the interviews.

Table 2. General description of the interviewed importers

Importer	Volume m ³ /year	Size class	Main customer segment	Employees	Interviewee's position in company
1	200 000	Large	Construction	55	Owner
2	300 000	Large	Construction & Joinery	250	Purchaser
3	100 000	Medium	Construction	55	Son of owner
4	60 000	Small	Construction	12	Owner
5	200 000	Large	Construction	50-60	Owner
6	90 000	Medium	Construction	15	Owner
7	40 000	Small	Construction & Joinery	14	Owner

Importer 1: This is one of the largest importers in Alexandria and at the time of visit the company had 30 000 m³ softwood stored in in the yard. The yard was well organised and clean. Although the company's main segment is the construction sector they also provide e.g. door and window manufacturers with softwood. The respondent had been in the softwood business for 25 years, owning this company since 2003.

Importer 2: The largest importer that was interviewed, measured by both volume and workforce. The company is one of four in a group of companies with the same owner that are active in trade with wood products. For example there is another company in the group that imports fibreboards. The newest addition to the group was a softwood trading company established by the owner's son. The respondent had been working for 25 years in the company.

Importer 3: The respondent was the son of the owner and had been raised into the family business. This is common in Egypt, and a way of ensuring that companies stay in the family.

Importer 4: This was the company that employed the smallest workforce (12 employees). The respondent started the company five years ago, but was in the softwood business long before that.

Importer 5: The only importer who was not interviewed at his facilities, but instead at Unirets office. He was going to Unirets in other business and agreed to do the interview as he was there. I did however visit the yard after the interview. The respondent started the company 15 years ago and differed from the others by selling the softwood to merchants. He described the benefit of this as reducing the number of customer contacts.

Importer 6: This importer is currently not a customer of U4M, but he buys Finnish softwood from Unirets (U4M's sales unit in Egypt). The visited yard was used exclusively for Finnish softwood but he owned another company that imported 250 000 m³/year from other than Finnish suppliers. The additional company employed 30 workers and was not visited.

Importer 7: This importer was the smallest one, measured by purchased volume per year. The company was established six years ago by two men who worked for another importer. The stock was 1500 m³ softwood at the time of visit. They serve all kind of customers within the construction and furniture sector. Both owners were present during the interview, but only one answered to the questions. They differed as being young compared to the other importers who in average was over 40 years old.

Considering that the importers were of varying size and that they account for more than one-fifth of Egypt's total softwood import the sample is likely to reflect the total population of Egyptian softwood importers in a fair way.

5.3 What the importers value

The result is organised according to the six quality dimensions that were investigated. Each section starts with presenting an IP-diagram based on the questionnaire results. The diagrams illustrate the importance of the investigated items, and thereby also what characterises a good supplier. In addition to this they also illustrate U4M's performance on each item. The interview results are presented after the IP-diagrams and broaden the perspective by explaining the importer's opinions of the items in words.

5.3.1 Softwood Performance

Figure 17 summarizes mean values of the answers on importance and performance on each of the sub-items constituting softwood performance. Absence of knots and twists are reported as the most important aspects in this dimension. U4M are performing as well as their competitors on both aspects. Marking (BL-marking) is seen as the least important item. Remaining questions were rated approximately equally important and U4M are performing better than competitors on all but the question about lengths.

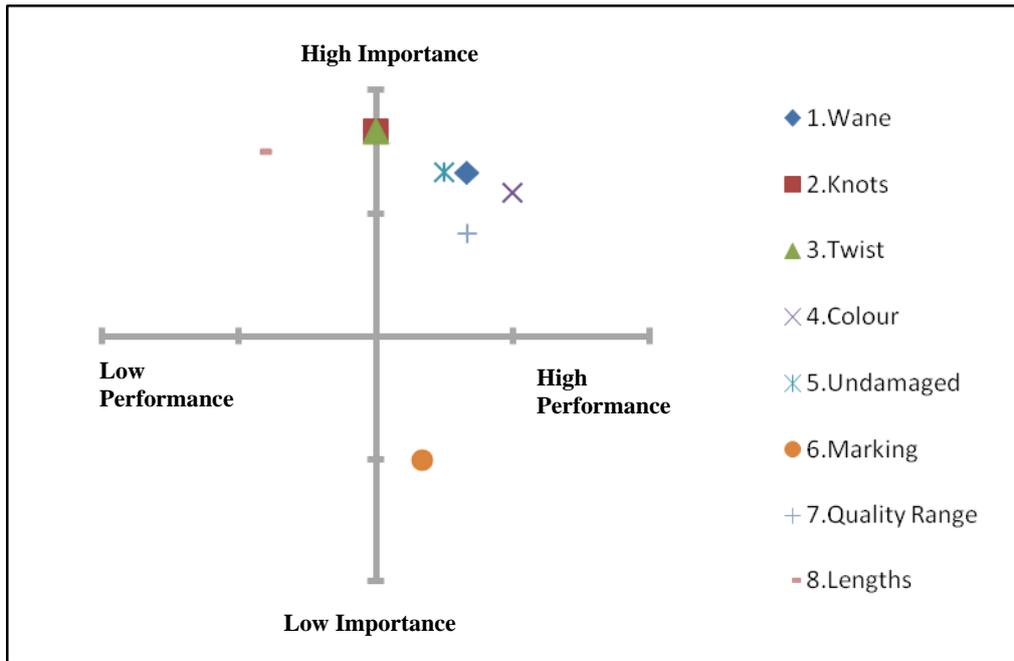


Figure 17. Softwood Performance IP-diagram.

The general opinion is that wane is acceptable in products that per definition include wane. When wane or any other flaw occurs in products where it should not, the importers make reclamations and wait with selling the products until they know if they will be compensated. Importer 1, 2, 3 and 4 complained about one specific U4M owner delivering products with more wane than the others. The problems were associated with some of this owner’s sawmills and not all.

“Wane itself is not a problem as long as the price is adjusted to the flaw” (Large importer)

Knots are regarded in the same way as wane, meaning that it is accepted in products where it is expected. Big knots that penetrate the wood are especially problematic as they might fall out. Importer 1, 2, 3 and 4 that complained about wane are experiencing problems with knots from the same U4M owner. Importer 2 added that Russian suppliers are better than Nordic suppliers at delivering products free from knots, but that they are associated with other problems instead. One problem with Russian products is that they are dirty, which is a result from old sawmills.

“Sometimes I receive products that consist of more knots than wood” (Large importer)

It is more difficult for the importers to sell twisted products since they are less suited for later production. Importer 2, who said that Russian suppliers are better at delivering products free from knots, said that they are better when it comes to twist as well. He explained that this is a result of the Russian forest’s state, with e.g. older stands than Nordic forests. Importer 6 sometimes sells products that are too twisted based on weight instead of volume, which decreases profits.

“Twisted products can always be sold – It is just a matter of price” (Medium importer)

All importers but one regard discoloured products as problematic. Importer 1 differed from this opinion and explained that these products always have a reduced price, and that they can still be sold, despite being discoloured.

All respondents said that it is unusual that any supplier delivers damaged products and that it is important that this continues. If it does happen it is usually a couple of boards that have been broken during shipping.

The way of marking (BL-marking) the packages is important for the port workers and not directly for the importers. The importers do not have an opinion about how marking should be done as long as the port workers can identify the correct buyer. Other suppliers mark the products with the importers name instead of numbers like U4M. Importer 4 and 7 had have problems with mixed up packages in the port, due to incorrect marking. This created confusion and extra work. Another problem is that there are importers that try to benefit from mix-ups.

“The marking is not important for me as an importer, but for the port workers” (Medium importer)

The market currently demands different qualities to a larger extent than before, which makes it important for the importers to be provided with varying qualities. Importer 5 explained that the demand used to be higher for low qualities compared to higher. He added that it sometimes has become hard to sell the lowest qualities, something that never used to be a problem before. Large customers usually buy varying qualities, whilst small customers mainly buy lower qualities.

“My customers demand varying qualities and I need a supplier that provides me with those products” (Medium importer)

The general opinion is that longer lengths are better because a larger portion of these products can be used in the production of e.g. a door, which makes them more demanded. Russian suppliers are better than Nordic when it comes to lengths, since they have older forests and sawmills that can saw longer lengths. Importer 1 said that e.g. door manufacturers are good at using spill for other products and rated the question as less important than the others. Importer 2 pointed out one U4M owners as less good than the others regarding lengths. Importer 4 complained about U4M’s lengths differing +/- 10 cm and said that this is something that they need to improve.

5.3.2 Perceived Quality

Figure 18 summarizes mean values of the answers on importance and performance on each of the sub-items constituting perceived quality. That the supplier is large is most important in this dimension, followed by the supplier having a good reputation and being well-established. U4M are performing better than their competitors on all questions.

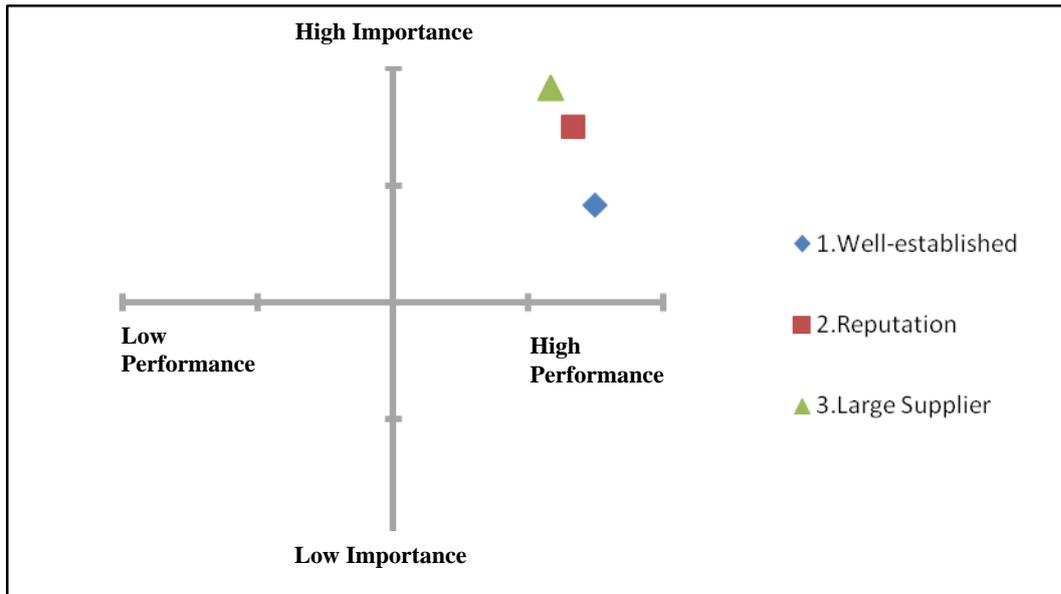


Figure 18. Perceived Quality IP-diagram.

The importers trust well-established suppliers and experience that the business process runs more easily with them. U4M and Rets Timber were hard to separate as they together are considered to be the most well-established suppliers in Egypt. Importer 1 explained that U4M’s long presence has given them knowledge which enables them to make the right decisions in the market. He confirmed his statement by adding that he sees other suppliers imitating U4M’s way of working in Egypt.

“I would not work with U4M if they were not the best partner. Since U4M is the most established supplier in the market this answers your question about the importance of suppliers being well-established” (Large importer)

The general opinion is that U4M together with Rets Timber has the best reputation. This is a result of them proving themselves as good partners for a long time. The Russian suppliers have a poor reputation because of misunderstandings and lack of safety when working with them. Importer 1 has decided to stop working with Russian suppliers and many of the others try to buy most of their volumes from Nordic suppliers.

“Working with Russian suppliers is like working with the mafia” (Large importer)

The importers consider a large supplier to have a better ability to provide them with their required volumes than a small supplier. Importer 5 said that it is easier to work with large suppliers because they have more specified routines.

5.3.3 Reliability

Figure 19 summarizes mean values of the answers on importance and performance on each of the sub-items constituting reliability. All questions are approximately equally important in this dimension and U4M are performing better than their competitors on all. The question about suppliers delivering what was ordered was reported most important and the question about delivery being made just-in-time least important.

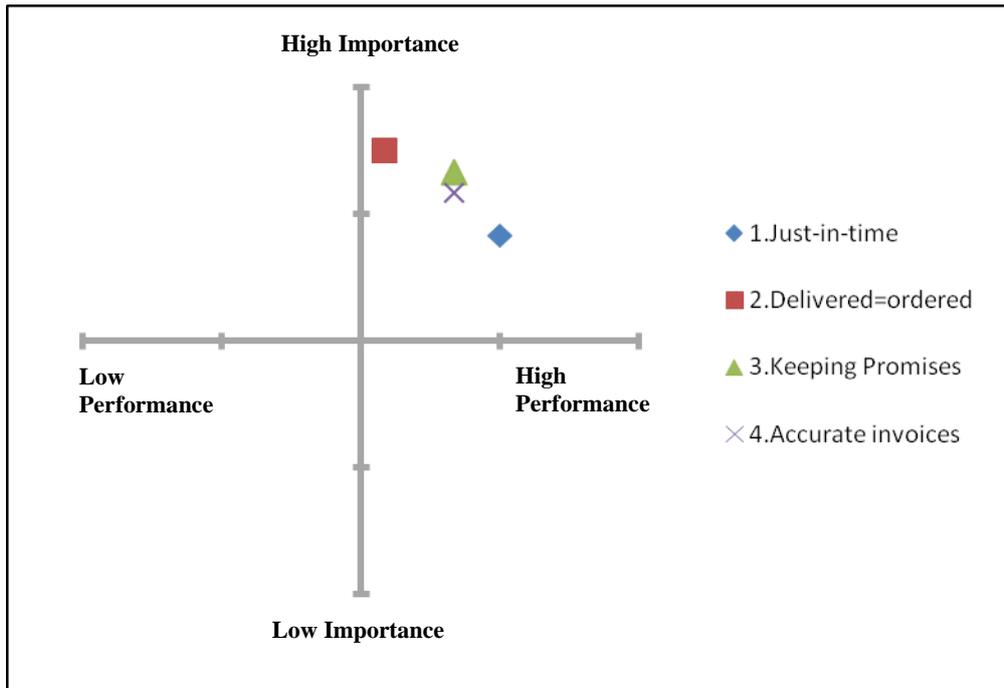


Figure 19. Reliability IP-diagram.

Nordic supplier’s deliveries are rarely delayed and they are good at informing the importers in time when it does happen. Russian deliveries are in contrast often delayed and often come at bad timing. Importer 1 said that Russian suppliers sometimes do not even give a date of delivery.

“The Russian suppliers do not even give us a delivery date and when delivery finally is made it is often at a bad timing” (Large importer)

All suppliers are good at delivering what was ordered which is important to avoid reclamations. When U4M fail to deliver what was ordered the importers contact Unirets. Unirets inspect the products and then inform U4M. Importer 7 gave a real example of the problem. He ordered 3000 m³ that was sold before delivery, but only 1500 m³ was delivered. Although this was a mistake made by U4M he was satisfied with their way of handling it.

“All suppliers deliver what was ordered, even the Russian ones.” (Large importer)

The importance of the suppliers keeping their promises is explained by this quote:

“Keeping promises shows commitment and commitment generates trust” (Medium importer)

The importers said that all suppliers that they buy from submit accurate invoices. Importer 6 said that there are suppliers who are known for submitting incorrect invoices and that no one works with them because of this.

5.3.4 Responsiveness

Figure 20 summarizes mean values of the answers on importance and performance on each of the sub-items constituting responsiveness. Being informed about problems when they occur and being visited by the supplier are reported as most important. The supplier quickly solving problems and taking responsibility for orders that does not fulfil expectations are also

important. U4M are performing better than competitors on all four questions. To have a supplier that can handle unpredicted orders is not important.

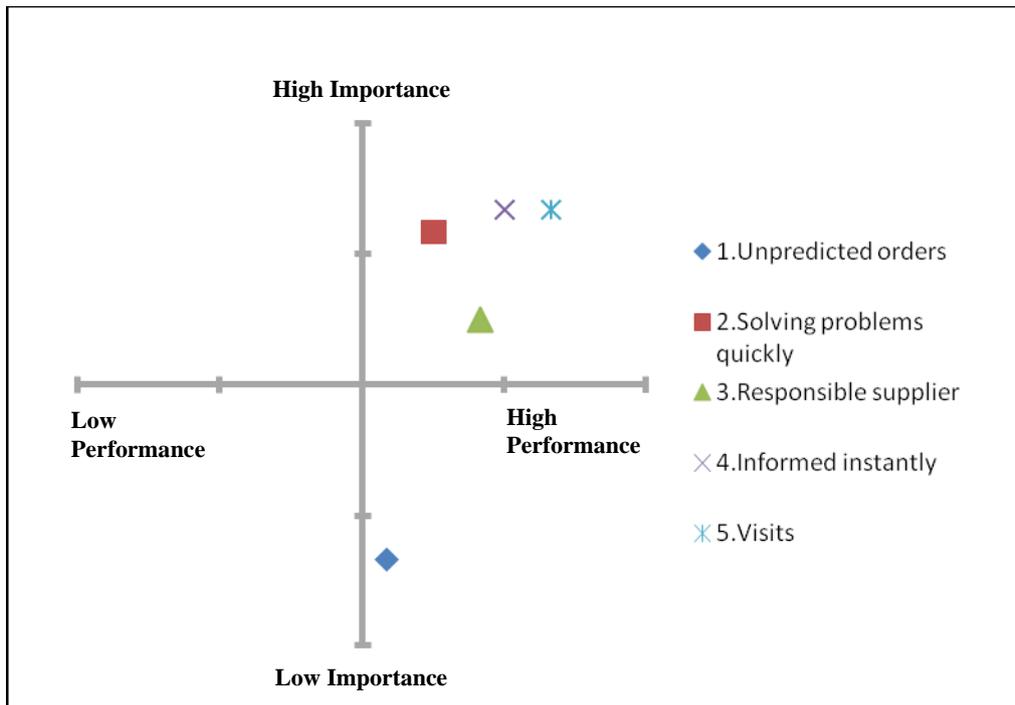


Figure 20. Responsiveness IP-diagram.

The supplier’s ability to handle unpredicted orders is not regarded as important. Importer 7 said that they do not experience unexpected demand. He added that it would be important if the market’s demand was more varying and unexpected. Importer 6 explained that the demand used to change much quicker before the revolution, but that it is less varying now. He could not explain the reason for this phenomenon.

Suppliers should be particularly quick at solving problems regarding reclamations. A quick decision on compensation is crucial so that the importers know for what price they can sell the products. U4M are better than competitors at this and especially better than the Russian suppliers. Importer 5 said that U4M are slower than other Nordic competitors when it comes to reducing the price on products that are not demanded. He gave an example of this. Finnish suppliers were more responsive to reduce their prices when the demand for 50x100 mm 6th grade products decreased a couple of months ago. Even though U4M decreased the price it is higher than the Finnish which makes the products harder to sell.

All suppliers are good at informing the importers about problems once they occur, which reduces the effects of problems.

Being visited by the suppliers is a prerequisite for a good relationship according to the importers. Visits increase the understanding of each other and thereby facilitate the business process. U4M and Rets Timber are performing much better than their competitors regarding visits. Importer 6 said that it would be ideal if the suppliers visited him at the time of every large delivery, so that any problems could be solved instantly. Importer 7 mentioned that U4M invited the importers to Sweden and that this was a gesture that he appreciated.

“I would be glad to have suppliers visiting me every day if it was possible” (Large importer)

5.3.5 Assurance

Figure 21 summarizes mean values of the answers on importance and performance on each of the sub-items constituting assurance. Having a personal relationship to the supplier and having a supplier that understands Egyptian ethics, customs and norms are regarded as important. U4M are performing better than competitors on both questions.

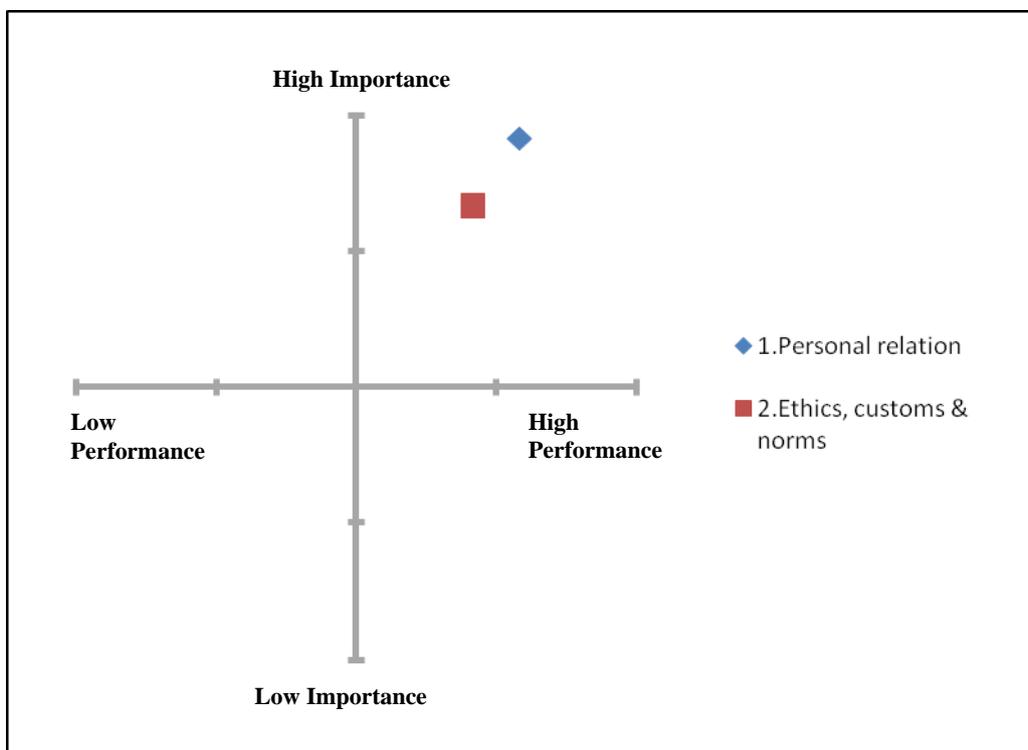


Figure 21. Assurance IP-diagram.

All respondents said that the relationship to the supplier has to be good in order for business to function. The relationship to U4M is considered to be very good by all importers and one of the main reasons reported for this was U4M’s long presence in the market. Having Unirets as a link also strengthens the relationship between the importers and U4M.

“I am proud to do business with U4M” (Large importer)

Having a supplier that understands Egyptian ethics, customs and norms is important because it facilitates working with each other. It is difficult to do business with a supplier who lacks this understanding. U4M’s long presence in the market has made them experienced and the importers consider them to have a better understanding than their competitors. Importer 7 said that this is important also for the importer. For instance the activity in the market decreases

every year during Ramadan. It is important for the supplier to understand the cause of this as well as for the importer that the supplier shows understanding during Ramadan.

“The activity is always very low during Ramadan” (Small importer)

5.3.6 Supplier Services

Figure 22 summarizes means of the answers on both importance and performance on each of the sub-items constituting supplier services. Supplier being easy to contact stood out as most important in this dimension combined with U4M performing much better than their competitors. Remaining questions were reported as approximately equally important.

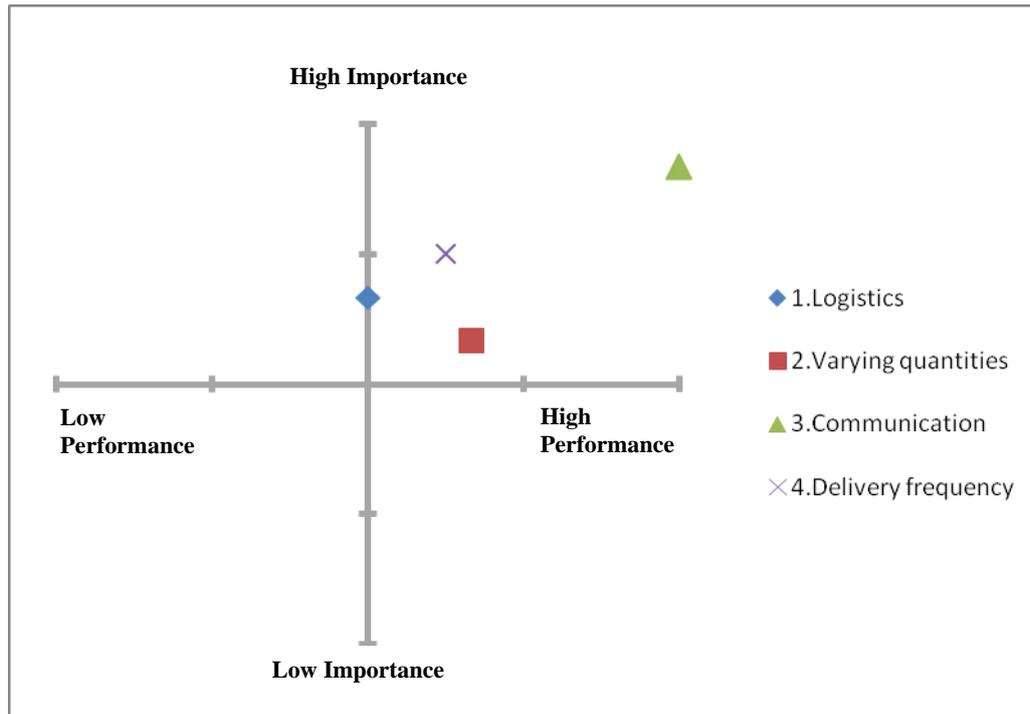


Figure 22. Supplier Services IP-diagram.

The supplier’s logistical solutions differ little and are working well according to the importers. Importer 7, who had problems with mixed up packages due to incorrect marking, did however rate U4M’s performance as worse because of this.

The importers had different opinions about the importance of having a supplier that accepts varying order quantities. Importer 2 explained that he buys whatever is offered, regardless quantity. Importer 6 said that varying quantities is not important since he only buys large volumes. Importer 7 explained that it is important for him to be provided with quantities that match the current demand so an excessive stock is avoided.

Easily being able to contact the supplier is important according to all importers. The importers are satisfied with the communication between them and U4M. The reason for this was reported as Unirets. The importers normally contact Unirets who then decide whether U4M is contacted or not. Importer 3 said that Unirets is U4M’s strongest competitive advantage. Since Unirets also handles Rets Timber’s sales they are regarded as equal compared to U4M. Other suppliers are contacted directly which is more difficult and less effective. The communication with Russian suppliers was pointed out as particular problematic.

The shipments come with approximately one month's interval and all importers are satisfied with the current frequency. Importer 7 said that the frequency has a psychological effect since it is stressful to come to the yard if the stock varies much in short time. He said that both frequency and its consistency are important.

“It is psychologically important that the deliveries come with a good and consistent frequency” (Small importer)

5.4 Comparison of dimensions

Figure 23 summarizes mean values of the answers on importance and performance on the six investigated dimensions. There are no significant differences when comparing the dimensions even though there is some spread amongst them. Assurance is the most important dimension, followed by Perceived Quality, Reliability and Softwood Performance. Supplier Services and Responsiveness are least important. That all dimensions are placed in the same quadrant is interesting. This means that they are all regarded as important at the same time as U4M are performing better than their competitors.

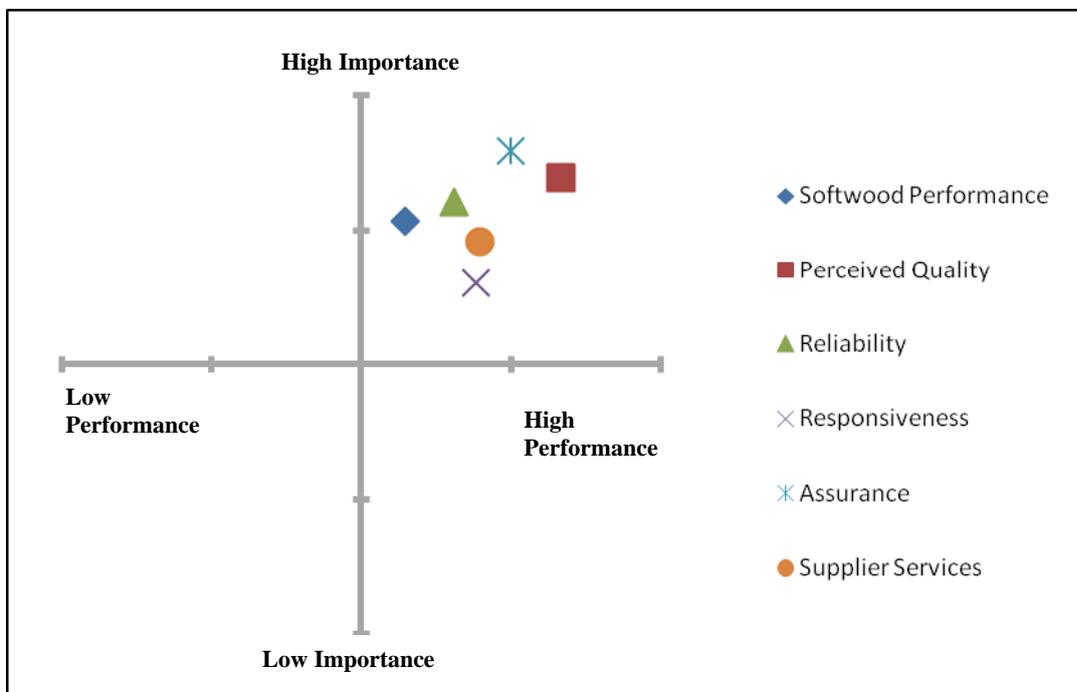


Figure 23. Investigated quality dimensions IP-diagram (Based on mean of mean values).

5.5 Comparison of product quality and service quality

Product quality includes two dimensions, softwood performance and perceived quality. Service quality includes supplier services, reliability, responsiveness and assurance. Figure 24 summarizes mean values of the answers on importance and performance on product quality and service quality. Product quality and service quality are reported as equally important and U4M are performing equally high on both aspects.

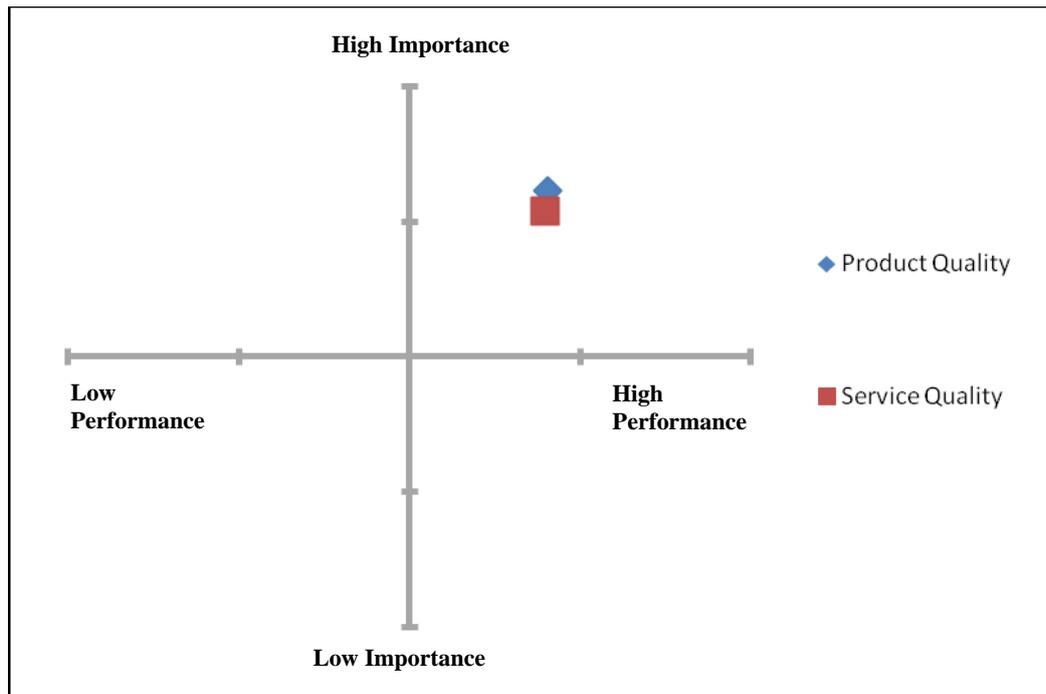


Figure 24. Product and Service Quality IP-diagram.

5.6 Most important, highest and lowest performance questions

This section compares the dimension's sub-items to each other and identifies the questions that are most important and those where U4M are reported as highest and lowest performing.

To have a personal relation with the supplier and that the supplier is large are reported most important. (Table 3) The fact that the five most important questions are identified in four different dimensions is interesting and means that the importers value and require a mix of varying supplier characteristics.

Table 3. The five questions reported as most important

Importance score	Question	Dimension
4,8	1. To have a personal relation with the supplier	Assurance
4,8	3. Supplier being large?	Perceived Quality
4,7	2. Absence of knots?	Softwood Performance
4,7	3. Absence of twist?	Softwood Performance
4,7	3. That it easy to contact the supplier?	Supplier Services

Uni4's performance was reported highest on the question about easy being able to contact the supplier (Table 4). Two of the questions in table 4 are also found in Table 3 which means that U4M are performing much better than competitors on two of the five most important questions.

Table 4. The questions with the highest performance scores

Performance score	Question	Dimension
5	3. That it is easy to contact the supplier?	Supplier Services
4,5	1. Supplier being well-established in the industry?	Perceived Quality
4,3	5. Supplier visiting us?	Responsiveness
4,3	2. Supplier having a good reputation in the market?	Perceived Quality
4,2	3. Supplier being large?	Perceived Quality

Table 5 presents the seven questions with the lowest performance scores amongst the 15 most important questions. This can be seen as an indication to where U4M should focus improvement, despite that they are performing better than their competitors on four of the questions. U4M's performance is reported lowest on the question about offering required lengths. Five of the questions in Table 6 derive from the same dimension, which is softwood performance. This is interesting since this dimension is the one that U4M influences the least. This statement is based on the fact that it regards the physical characteristics of the softwood, meaning that it is more influenced by the owners' sawmills than by U4M.

Table 5. The questions with the lowest performance scores amongst the most important questions

Question	Performance	Importance	Dimension
Lengths	2,2	4,5	Softwood Performance
Absence of knots	3	4,7	Softwood Performance
Absence of twist	3	4,7	Softwood Performance
Delivered = ordered	3,2	4,5	Reliability
Products delivered undamaged	3,5	4,3	Softwood Performance
Absence of wane	3,7	4,3	Softwood Performance
Keeping promises	3,7	4,3	Reliability

5.7 Origin – North vs. South

Northern products are roughly defined as those sawn in sawmills located north of Stockholm and are in general regarded as better than southern in Egypt. The opinions only deviate from this when discussing specific products. Northern products are preferred within the 6th grade because they come with smaller knots than the southern. Southern products are considered as equal as and sometimes better than northern within the 5th grade. The importers also explained that the natural conditions in Sweden were the source of these differences. All importers think that it is crucial to be provided with sufficient volumes of northern products, since their customers demand these specifically. Importer 1 said that the northern Swedish products are regarded as better than both Finnish and Russian products from the same latitude, whilst southern Russian products are better than both Swedish and Finnish products from the south.

“My customers always ask me about the origin and they prefer northern products” (Medium importer)

5.8 Current and future market situation

During the interviews current and future market situation were discussed. The demand for softwood has decreased since after the revolution, mainly explained by low activity in the construction sector. As the demand is low the importers describe the current situation as very competitive. One importer explained that there is two ways of handling the situation. The more established importers refuse to lower their prices and sit tight waiting for the market to recover. This strategy requires capital that keeps the business running. The less established importers are more dependent on cash flow and therefore they lower their prices instead. However the market is considered to endure the situation relatively well and it is still possible to make profitable trade. The competitive environment makes the importers very dependent on being offered specifications that contain products matching the demand.

All importers think that the market will take a strong upswing within one or two years. This is based on how well the market is doing today despite the circumstances. If the political situation stabilizes after the election in 2012 the construction projects are expected to increase

which will increase the demand for softwood. Who will be elected will play an important role for the nearest future.

“If we can make business during times like these, imagine what we can do when Egypt is stable” (Small importer)

In the short-run the softwood market will be very affected by the political outcome of the upcoming election. Common for all respondents is however that they are very positive about the market’s future when discussing it from a more long-time perspective. This positivity originates from how good the market currently is functioning, despite the instability.

6 Analysis

This chapter is divided in two main sections. The first section identifies U4M’s strengths and weaknesses based on an importance-performance analysis. The second part identifies possible sources of competitive advantage, possessed by U4M. Finally the current and future market situation is discussed.

6.1 Importance-Performance Analysis (IPA)

The IPA is organised after the investigated dimensions. An IPA is presented in form of a table for each dimension. The tables are based on the IP-diagrams in the result chapter and are thereby analysing the quantitative data from the questionnaires. The implications are according to Figure 11 based on which quadrant each sub-item was positioned in. What implication each importance-performance combination leads to is shown in Table 6.

Table 6. Implications based on importance-performance combination.

Importance	Performance	Implication
High	High	“Keep up the good work”
High	Low	“Concentrate here”
Low	High	“Possible overkill”
Low	Low	“Low priority”

The qualitative results from the interviews were also regarded when discussing the implications. Additional analysis of each dimension is presented in what is called “Further comments”.

6.1.1 Softwood Performance

Table 7 is an IPA of the sub-items constituting softwood performance and is based on Figure 17. U4M’s strengths are identified as delivering better products regarding wane, discolouration and undamaged products than their competitors. Providing their customers with a wide quality range is also an identified strength. The implication is to “keep up the good work” when it comes to these four sub-items. Despite U4M’s general high performance on these questions it is important to point out that there was a performance spread amongst specific U4M owners when discussing wane and knots.

Table 7. IPA of softwood performance.

Question	Importance	Performance	Implication
1. Wane	High	High	Keep up the good work
2. Knots	High	Equal	Keep up the good work/Concentrate here
3. Twist	High	Equal	Keep up the good work/Concentrate here
4. Colour	High	High	Keep up the good work
5. Undamaged	High	High	Keep up the good work
6. Marking	Low	High	Possible overkill
7. Wide quality range	High	High	Keep up the good work
8. Lengths	High	Low	Concentrate here

Improvement actions should be focused on providing the importers with required lengths. The main explanation to U4M’s low performance on this item is that the Russian suppliers are able to deliver much longer lengths. The importers were aware of the difference state of Russian forest compared to e.g. Swedish and therefore they did not direct any criticism towards U4M’s ability to provide them with longer lengths. It did however result in U4M being rated as worse performing than their competitors. Another reason for low performance on lengths is that there

was a spread in how good the importers regarded U4M’s four suppliers (owners). Additional improvement actions may be focused on providing the importers with products associated with less knots and twist since these items are positioned between the “keep up the good work” and “concentrate here” quadrants.

The way of marking the products is classified as a question of “possible overkill”. It is important to clarify that this is an important item, but that it is important for the port workers and not directly for the importers.

Further comments

The trend towards a more diverse demand, including more products of higher qualities is likely to continue. The main reason for this is Egypt’s increasing GDP/capita (Figure 4), which increases the demand for housing (FAO 2003). This effect is strengthened by the fact that 33 % of Egypt’s population is below the age of 15 (CIA 2012). This large portion of the population will sooner or later start moving to own housings. Houses need to be equipped with windows and doors, which are produced from 5th and 6th grade products. The houses also need to be furnished, which will also increase the demand for higher qualities. An increased demand for higher qualities is strengthened by the fact that the Egyptian furniture production is expected to increase (Egyptian Furniture Export Council 2010). This will make the supplier’s ability to provide the importers with varying qualities even more important in the future.

6.1.2 Perceived Quality

Table 8 is an IPA of the sub-items constituting perceived quality and is based on Figure 18. All sub-items are reported as important and U4M are performing better than competitors on all questions. The implication is that U4M should “keep up the good work” in this dimensions.

Table 8. IPA of perceived quality.

Question	Importance	Performance	Implication
1. Well-established	High	High	Keep up the good work
2. Reputation	High	High	Keep up the good work
3. Large supplier	High	High	Keep up the good work

Further comments

Even though all questions in this dimension were regarded as important there are differences between them. A supplier’s degree of establishment and reputation is valued because they are parameters of other values, such as trust and safety. A well-established supplier inspires trust and its reputation reflects how it is as a partner when it comes to e.g. misunderstandings and safety. This means that the importers value trust and measure it by how well-established the supplier is. In the same way they value safety and absence of misunderstandings and measure it by the supplier’s reputation.

The size of the supplier is regarded as a direct measure of the supplier’s ability to provide the importers with required volumes. It is interesting that this opinion was the same amongst all importers, regardless of their size. It would have been logical if this were rated as more important by large importers than smaller ones.

U4M’s performance was reported as much better than their competitors’ on all three questions in this dimension. It is interesting that the importers could not separate U4M from Rets Timber when discussing establishment and reputation. The main reason for not being able to

separate U4M and Rets Timber is probably that they are performing equally well on these questions. Another reason could be that Unirets handling both companies' sales softens down the fact that U4M and Rets Timber are competitors. High performance on both questions is correlated to how long the supplier has been serving the market.

6.1.3 Reliability

Table 9 is an IPA of the sub-items constituting reliability and is based on Figure 19. All questions are reported as important and U4M are performing better than competitors on all of them. The implication is that U4M should “keep up the good work” in this dimensions.

Table 9. IPA of reliability.

Question	Importance	Performance	Implication
1. Just-in-time	High	High	Keep up the good work
2. Delivered=ordered	High	High	Keep up the good work
3. Keeping promises	High	High	Keep up the good work
4. Accurate invoices	High	High	Keep up the good work

Further comments

That all suppliers deliver what was ordered is surprising because it includes Russian suppliers, who are reported as poorly performing on many other questions. The reason for this may be that Russian suppliers are aware of that if they do not deliver what was ordered they will lose customers, whilst e.g. not delivering on time only seems to create dissatisfaction. This is confirmed by the fact that delivering what was ordered was rated most important in this dimension and delivering just-in-time was rated least important (Figure 19). The same thinking can be applied for the question about accurate invoices. It seems as if high performance on these questions is a minimum requirement. This is confirmed by Importer 6's comment saying that no one works with suppliers who submit incorrect invoices. Delivering what was ordered and submitting accurate invoices is therefore identified as “basic factors” according to the three-factor theory of customer satisfaction (Figure 12).

The smallest importer (Importer 7) explained how he once was delivered less than he had ordered. Even though he rated U4M's performance as equal compared to competitors, it shows how sensitive a small supplier is. It also shows that it only takes one mistake to create dissatisfaction. U4M were however quick to re-establish satisfaction by handling the mistake in a suitable way.

6.1.4 Responsiveness

Table 10 is an IPA of the sub-items constituting responsiveness and is based on Figure 20. U4M are performing better than competitors on all questions, but only four are reported as important. U4M are performing better than competitors when it comes to handling unpredicted orders, which is not regarded as an important issue. This means that too much effort is focused on this, resulting in a “possible overkill”.

Table 10. IPA of responsiveness.

Question	Importance	Performance	Implication
1. Unpredicted orders	Low	High	Possible overkill
2. Solving problems quickly	High	High	Keep up the good work
3. Responsible supplier	High	High	Keep up the good work
4. Informed instantly	High	High	Keep up the good work
5. Visits	High	High	Keep up the good work

Further comments

That visits are important because they strengthen the relationship between the supplier and the importer reflects the importance of personal relationships rather than visits. The importance of visits thereby confirms the importance of relationships. The importers had difficulties separating U4M and Rets Timber when discussing performance on visits. U4M's high performance would probably have been even higher if Rets Timber was excluded from the comparison. This means that U4M are performing even better than Figure 20 illustrates if comparing to most suppliers.

The question on being informed about problems once they occur was asked without defining "problems". The importers did however specify this, as they said that it is especially reclamations that they need quick decisions on.

That U4M are better than their competitors at delivering quick solutions is likely to be correlated to Unirets. Since Unirets are located in Alexandria the time needed to solve problems is reduced.

6.1.5 Assurance

Table 11 is an IPA of the sub-items constituting assurance and is based on Figure 21. Both items are reported as important and U4M are performing better than competitors on both, meaning that the good work should be kept up in this dimension.

Table 11. IPA of assurance.

Question	Importance	Performance	Implication
1. Personal relation	High	High	Keep up the good work
2. Ethics, customs & norms	High	High	Keep up the good work

Further comments

The importance of the questions in this dimension reveals what a complex market Egypt is to serve. Both having a personal relationship with your supplier and having a supplier that understands Egyptian ethics, customs and norms are important. High performance on these questions is correlated to how long the supplier has been serving the Egyptian market. It takes time to build relationships and to obtain knowledge that enhances understanding. One explanation to U4M's high performance in this dimension is therefore the fact that they have been present in the Egyptian market for many years. Another reason, mentioned by the importers for the good relationship to U4M is Unirets. It is interesting how Unirets actually improves the relationship between U4M and the importers, since you could argue that Unirets distances U4M from the importers.

6.1.6 Supplier Services

Table 12 is an IPA of the sub-items constituting supplier services and is based on Figure 22. All items are reported as important and U4M are performing better than their competitors on all but one. U4M performs equal as their competitors when it comes to providing a logistical solution that meets the importer's requirements. During the interviews it was reported that the importers are satisfied with all suppliers' logistical solutions, meaning that U4M should not focus on improving this item further.

Table 12. IPA of supplier services.

Question	Importance	Performance	Implication
1. Logistics	High	Equal	Keep up the good work/Concentrate here
2. Quantities	High	High	Keep up the good work
3. Communication	High	High	Keep up the good work
4. Delivery	High	High	Keep up the good work

Further comments

Being provided with varying quantities and delivery frequency seem to be more important to small importers than larger ones. This is based on that Importer 7 (the smallest one) reported these as important issues, whilst the others rated them less important. Importer 7 reported that the quantities should match the demand so an excessive inventory can be avoided. He added that it is stressful when delivery frequency leads to the stock varying a lot. The company's economic situation is likely to play an important role in this since one difference between a small and large importer is their economy. Large importers have had time to build up capital, and are less sensitive to costs than a small importer.

Table 4 shows that U4M's performance is highest on the question about easy being able to contact the supplier. That U4M are performing better than their competitors indicates that an intermediary (Unirets) is a better solution than direct contact between importers and suppliers. The most important reason for direct contact being difficult is likely to be the long geographical distance since it restricts the communication to phone and mail. Another factor is the existing language barrier.

6.2 Sources of competitive advantage

This sub-chapter analyses the results based on VRIO, aiming to identify sources of competitive advantage that can be used by U4M to enhance their competitiveness. The analysis is based on the quantitative data from the questionnaires as well as the qualitative data from the interviews.

6.2.1 U4M's structure of ownership

U4M's structure of ownership is identified as a source of competitive advantage. Four large forest companies own U4M, giving them access to a large number of sawmills. Since the Egyptian demand is becoming more diverse U4M have a better ability to meet this than their competitors. Another reason for this being a source of competitive advantage is that the importers regard a larger supplier as more capable of providing them with required volumes. With four owners U4M is the largest Swedish supplier, and most likely one of the largest compared to Finland and Russia as well. That U4M's structure of ownership is a source of competitive advantage is confirmed when analysing it based on VRIO: It is a valuable resource as it enables U4M to exploit the opportunity of meeting a more diverse demand and makes U4M large. Since no other softwood exporting company has the same ownership structure it is also a rare resource. The resource is hard to imitate since entering co-ownership with competitors like U4M's owners have, is a socially complex decision.

6.2.2 Unirets

Unirets is identified as a source of competitive advantage because of the importance of quick decisions. Unirets enables U4M to make quicker decisions on e.g. reclamations than competitors. The decisions are also likely to be more accurate. In addition to this Unirets also improves the communication according to the importers. Unirets thereby enables U4M to meet the importers wish for easy communication better than their competitors. Unirets is a

rare resource, despite it being shared by U4M and Rets Timber. There are no other suppliers with a counterpart to Unirets in Egypt. Unirets is hard to imitate, since there is a high degree of history associated with developing it. It has taken time to build up the relationship between U4M and Unirets, and relationships also need to be maintained. The identification of Unirets as a source of competitive advantage is confirmed by this quote:

“Unirets is U4M’s strongest competitive advantage in Egypt” (Medium importer)

6.2.3 U4M’s long presence in the Egyptian market

U4M’s long presence in the Egyptian market is the final identified source of competitive advantage. The importers reported U4M’s long presence as the main factor to their good reputation in the market. By proving themselves as good partners U4M has built up a strong reputation during their years serving the market. The long presence is also reported as the base for the good relationship between the suppliers and U4M, as well as the reason for U4M understanding the Egyptian culture better than their competitors. U4M’s long presence is a valuable resource since it enables them to meet the importers demand for high performance in the questions mentioned above. It is rare since many of U4M’s competitors have been serving the Egyptian market for a shorter time than U4M. It is a resource that is hard to imitate since it depends on time.

6.3 The market and its future

Egypt is facing huge challenges, which will limit the country to an unknown degree in the oncoming years. The political instability and the global economic crisis have decreased FDI’s as well as the overall economic growth (African Development Bank, 2011). Although the Egyptian softwood market is affected by the political instability it is surprising how little the effect has been. This shows how robust the market is, and is confirmed by how good Egypt and its construction sector weathered the global economic crisis in 2008 (ADB 2010 & Developing 8 2010). When walking the streets of Alexandria you see on-going construction projects at every block. When driving to the importers you see more softwood leaving the yards than entering them. It is hard to believe that it is only one year since Swedish media reported daily from an Egypt in chaos. It is clear that the political instability does not freeze everyday life, houses still needs to be built and construction workers still go to work every morning.

The importer’s forecast of a future up-swing based on how well the softwood market has weathered the previous and current instability is confirmed by several factors analysed in the Egyptian market chapter. The expected growth in construction expenditures speaks for an increased softwood demand in the future (Figure 8). Witnessing the construction methods used in Egypt and the amount of softwood they require confirmed the identification of this sector being the main driver of softwood consumption (Figure 15 & 16). Egypt’s increasing GDP/capita (Figure 4) will increase the demand for housing (FAO 2003). The young and dynamic state of Egypt’s population will also affect demand for housing positively (CIA 2012).

7 Discussion

7.1 Previous studies

The findings of this study show that Egyptian softwood importers value product quality and service quality equally high. They also regard the quality dimensions that were investigated, softwood performance, perceived quality, reliability, responsiveness, assurance and supplier services as approximately equally important.

Bränngård's (2011) study showed that Norwegian building merchants regard product quality and service quality as equally important, which is confirmed in this study too (Figure 24). All previous studies reported significant differences regarding the importance of the investigated dimensions. Hansen et al. (1996) identified lumber characteristics as the most important dimension and both Toivonen (2005) and Bränngård (2011) identified reliability as the most important dimension. The Egyptian importers differ from the segments included in the previous studies by reporting all dimensions as approximately equally important (Figure 23).

7.2 Limitations

The study's sample size may be seen as limiting when it comes to the results being applicable beyond this study. Despite the fact that only seven importers were interviewed, they account for 22 % of Egypt's total softwood import per year. In addition to this the importers size varied from 40 000 to 300 000 purchased m³/year. This is likely to reflect the total population of Egyptian softwood importers in a fair way. The risk of the sample size being limiting has thereby been minimized. That the sample method was judgemental can also be seen as limiting. There is a risk that the respondents were selected based on their relationship to Unirets. However this was the only feasible way to select the sample as it was not possible to contact the suppliers directly.

It would have been interesting to interview construction and joinery establishments in addition to the importers. This would have broadened the perspective of the study, but was however not included in this study's scope.

Only current customers to U4M and Unirets were included in the sample. This made it difficult for the importers to include other Swedish suppliers in the performance comparison, which can be seen as limiting.

7.3 Sources of error

In order to make the importer visits possible, I was presented as an employee at U4M. This could have affected the importers when answering some of the questions, as they may have seen an opportunity to affect U4M directly. This source of error was minimized by explaining the purpose of the study to each respondent before the interviews.

The linguistic differences may be a possible source of errors. Errors caused by this source are likely to be negligible since a Unirets employee, speaking both Arabic and English, assisted the interviews.

8 Conclusions

- The Egyptian softwood market is demanding products of higher qualities to a larger extent than before. Despite these products being regarded as low quality-graded in Sweden, this is an important change of demand. Many suppliers still regard the Egyptian market as when it almost exclusively demanded 7th grade products. This treatment creates dissatisfaction amongst the importers. It is important to understand that Egypt can no longer be regarded as a market that only demands products of the lowest qualities. The importers have a distinctive demand for products besides the lowest qualities. They are aware of which suppliers that meet their demand and who is ignoring it. Suppliers who operate in Egypt only to sell what is not demanded elsewhere need to find another market for this.
- A good relationship to the supplier is regarded as crucial by Egyptian importers. In addition to this the importers puts great value in the supplier being large sized and easy to contact. Softwood characteristics such as absence of knots and twist are also reported as important. Such varying supplier characteristics being important demonstrate what a complex market Egypt is to serve.
- U4M are regarded as one of the strongest softwood suppliers in Egypt. Their main strength is being easy to contact. In addition to this they are also more established and better at visiting the importers. Other strengths of U4M are their reputation and their large size.
- U4M should focus improvement oriented actions to the softwood performance dimension. Five of the sub-items where U4M are performing most equal to their competitors are identified in this dimension (Table 6). It is important to point out that U4M are better performing than competitors on most of these items and that improving performance on them would increase an already superior performance.
- Russian suppliers are performing most poorly in the Egyptian softwood market. They are associated with a bad reputation and their deliveries are often delayed. However they are not performing worse on everything. For instance they are better at delivering long lengths, and they keep their promises and deliver what was ordered just as the other suppliers.
- The Finnish supplier Rets Timber is on several of the investigated items regarded as equally strong as U4M. They have an equally good reputation as U4M and are as easy to contact. Finnish and Swedish products are regarded as equally good when discussing the physical performance of the softwood.
- U4M's structure of ownership, their sales unit Unirets and their long presence in the Egyptian market were identified as sources of competitive advantage. These should be maintained and exploited in order to increase U4M's competitiveness in the Egyptian market.

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Appendices

Appendix1. Questionnaire

IMPORTER

Company name:
Date:
Location:
Annually purchased volume coniferous sawnwood: _____m ³
Served segments: Construction <input type="checkbox"/> Furniture <input type="checkbox"/> Other <input type="checkbox"/>
Number of employees:
Respondent's position in company:
Respondents number of years in the company:

This study investigates what Egyptian softwood importers value about their suppliers.

My name is Johan Edgren and the study that you are about to participate in is a part of my master thesis, at the Swedish University of Agricultural sciences (SLU). I am supervised by Mr. Anders Söderlund (Uni4 Marketing) and Mr. Anders Roos (Professor, SLU).

Below you will find 26 questions. Each question is answered based on two different aspects: "How important is this factor when you are buying softwood?" and "How well do Uni4 perform on this aspect, compared to competitors?". Competitors are defined as Swedish, Finnish and Russian softwood suppliers.

1= Not at all important
 2= Little importance
 3= Important
 4= High importance
 5= Very high importance

1= Much worse
 2= Worse
 3= Equal
 4= Better
 5= Much better

Product quality (Softwood Performance)	Scale of <u>Importance</u>					Uni4's <u>performance</u> compared to competitors				
	1	2	3	4	5	1	2	3	4	5
Question										
1. Absence of wane?	1	2	3	4	5	1	2	3	4	5
2. Absence of knots?	1	2	3	4	5	1	2	3	4	5
3. Absence of twist?	1	2	3	4	5	1	2	3	4	5
4. Absence of discoloration?	1	2	3	4	5	1	2	3	4	5
5. The products are delivered undamaged?	1	2	3	4	5	1	2	3	4	5
6. Packages being marked in a good way?	1	2	3	4	5	1	2	3	4	5
7. Supplier providing products within a wide range of quality?	1	2	3	4	5	1	2	3	4	5
8. Supplier offering lengths that minimize spill in later production?	1	2	3	4	5	1	2	3	4	5

1= Not at all important
 2= Little importance
 3= Important
 4= High importance
 5= Very high importance

1= Much worse
 2= Worse
 3= Equal
 4= Better
 5= Much better

Product Quality (Perceived Quality)	Scale of Importance					Uni4's performance compared to competitors				
	1	2	3	4	5	1	2	3	4	5
Question										
1. Supplier being well-established in the industry?	1	2	3	4	5	1	2	3	4	5
2. Supplier having a good reputation in the market?	1	2	3	4	5	1	2	3	4	5
3. Supplier being large?	1	2	3	4	5	1	2	3	4	5

1= Not at all important
 2= Little importance
 3= Important
 4= High importance
 5= Very high importance

1= Much worse
 2= Worse
 3= Equal
 4= Better
 5= Much better

Service quality (Reliability)	Scale of Importance					Uni4's performance compared to competitors				
	1	2	3	4	5	1	2	3	4	5
Question										
1. Delivery made on the date that was told (just-in-time)?	1	2	3	4	5	1	2	3	4	5
2. Delivered product's consistent equals to what was ordered?	1	2	3	4	5	1	2	3	4	5
3. The supplier keeps its promises?	1	2	3	4	5	1	2	3	4	5
4. The supplier consistently submits accurate invoices?	1	2	3	4	5	1	2	3	4	5

1= Not at all important
 2= Little importance
 3= Important
 4= High importance
 5= Very high importance

1= Much worse
 2= Worse
 3= Equal
 4= Better
 5= Much better

Service quality (Responsiveness)	Scale of Importance					Scale of Performance				
	1	2	3	4	5	1	2	3	4	5
Question										
1. Supplier can handle unpredicted orders?	1	2	3	4	5	1	2	3	4	5
2. Supplier quickly solving problems?	1	2	3	4	5	1	2	3	4	5
3. Supplier taking responsibility for orders that does not fulfil expectations?	1	2	3	4	5	1	2	3	4	5
4. Supplier informing us about problems once they occur?	1	2	3	4	5	1	2	3	4	5
5. Supplier visiting us?	1	2	3	4	5	1	2	3	4	5

1= Not at all important
 2= Little importance
 3= Important
 4= High importance
 5= Very high importance

1= Much worse
 2= Worse
 3= Equal
 4= Better
 5= Much better

Service quality (Assurance)	Scale of Importance					Scale of Performance				
Question	1	2	3	4	5	1	2	3	4	5
1. To have a personal relation with the supplier?	1	2	3	4	5	1	2	3	4	5
2. Supplier understanding your ethics, customs and norms?	1	2	3	4	5	1	2	3	4	5

1= Not at all important
 2= Little importance
 3= Important
 4= High importance
 5= Very high importance

1= Much worse
 2= Worse
 3= Equal
 4= Better
 5= Much better

Service quality (Supplier services)	Scale of Importance					Uni4's performance compared to competitors				
Question	1	2	3	4	5	1	2	3	4	5
1. Supplier's logistical solutions meeting your requirements?	1	2	3	4	5	1	2	3	4	5
2. Supplier accepting varying order quantities (small & large)?	1	2	3	4	5	1	2	3	4	5
3. That it is easy to contact the supplier?	1	2	3	4	5	1	2	3	4	5
4. Delivery frequency?	1	2	3	4	5	1	2	3	4	5

Appendix 2. Arabic questionnaire guide

Softwood Performance

- () أحرف الواح الحشب
- () العقد السوداء
- () حدوث الانحناء والعوج بألواح الخشب
- () أهمية استلام العميل البضائع بدون تلوين
- () استلام البضائع من الميناء بدون تلفيات شحن
- () حل الجادج على الربطة واضح بالارقام ام لا بالنسبه للمستورد
- () امداد العميل بمنتجات متغيرة بين عالية الجودة وقليلة الجودة
- () تزويد المستورد بالاطوال المناسبة للاحتياج

Perceived Quality

- () اهمية كل شركة خشب على حدى فى السوق المصرى
- () اهمية سمعة المنتج فى السوق
- () اهمية حجم شركة UNI 4

Reliability

- () اهمية الحصول على المنتج فى الميعاد المحدد
- () اهمية الحصول على المنتج بناء على المواصفات المطلوبة
- () اهمية وفاء الشركات بالخارج بوعودها
- () اهمية استلام فواتير دقيقة من الشركات بالخارج

Responsiveness

() أهمية سرعة استجابة الشركات بالخارج لطلبات العملاء من البضائع

الفورية اوالمفاجئة

() أهمية سرعة استجابة الشركات بالخارج لمشاكل العملاء

() أهمية تحمل الشركات بالخارج مسؤولية البضائع التي تخالف توقعات العملاء

() أهمية ابلاغ العملاء بأى مشاكل خاصة بالبضائع فور حدوثها

() أهمية زيارات مندوبى أو ممثلى الشركات بالخارج للعملاء

Assurance

() أهمية وجود علاقة شخصية بين العملاء والشركات بالخارج

() أهمية استيعاب الشركات بالخارج للثقافات والعادات والتقاليد للعملاء

Supplier Services

() أهمية حل مشاكل الشحن

() أهمية امداد العميل بكميات البضائع متغيره بين (قليلة وكبيرة)

() أهمية وجود مكتب وكيل فى مصر

() فترة تناسب العميل لشراء المنتج بالخارج بعد اخر عملية استلام

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