GLOBAL MARKETS FOR METALLIZED PAPERS & FILMS

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AGENDA

- Introduction
- Global Market Characteristics
- Metallized Film Markets
- Metallized Paper Markets
- Flexible Packaging
- Labeling
- Conclusions
INTRODUCTION
GLOBAL METALLIZED PRODUCT MARKETS - REGIONAL

Europe: 35%
North America: 25%
Asia Pacific: 23%
South America: 2%
ROW: 15%

By Tons, 2005
Source: Provisional Data, AWA Metallized Films & Papers: World Sourcebook 2006
GLOBAL METALLIZED PRODUCT MARKETS - MATERIALS

![Pie chart showing the distribution of global metallized product markets by material type.]

- **Film**: 66%
- **Paper**: 31%
- **Board**: 2%
- **Others**: 1%

Source: Provisional Data, AWA Metallized Films & Papers: World Sourcebook 2006
WORLDWIDE MARKETS

Source: Provisional Data, AWA Metallized Films & Papers: World Sourcebook 2006
KEY MARKET SEGMENTS

- Packaging: 65%
- Labels: 22%
- Technical: 4%
- Decorative: 5%
- Miscellaneous: 4%

Source: Provisional Data, AWA Metallized Films & Papers: World Sourcebook 2006
GLOBAL DISTRIBUTION OF METALLIZING MACHINES

Source: Provisional Data, AWA Metallized Films & Papers: World Sourcebook 2006
OVERALL TRENDS

- Decline in global share in N America & Europe
- Asia Pacific (Chinese) & Indian markets most buoyant
- S America back on radar screens
- Growth in metallized films sustained by flexible packaging
- Static/declining glue applied label market adversely affecting overall growth of metallized papers excepting Asia
METALLIZED FILM MARKETS
GLOBAL METALLIZED FILM MARKETS - MATERIALS

Source: Provisional Data, AWA Metallized Films & Papers: World Sourcebook 2006
GLOBAL METALLIZED FILM MARKETS - APPLICATIONS

88%

Flexible Packaging
Giftwrap
Labels
Decorative
Technical
Miscellaneous

By Tons

Source: Provisional Data, AWA Metallized Films & Papers: World Sourcebook 2006
AREAS FOR GROWTH

• Clear Oxide Coatings
• High Performance Coatings – Flexible Packaging
  – Barrier
  – Metal adhesion
• Patterned Metallizing
• Product Security & Brand Authentication
Microwaveable Packaging – Clear Oxides

Courtesy: AWA Conferences/Peeel Plastics Ltd
Retort Pouches – Pet Foods

Courtesy: AWA Conferences/Peel Plastics Ltd
Antennae/Arrays

Courtesy: Huek Folien
TRENDS/OPPORTUNITIES

- Growth in metallized films sustained by flexible packaging
- Dependency on flexible packaging markets
  - Flexible growth in Europe and North America slowing
- Technology “leapfrogging” in alternative markets
- Opportunities in labelling with development of new glue applied film bases
- Opportunities in “sustainable” films – PLA, etc
METALLIZED PAPER MARKETS
GLOBAL METALLIZED PAPER MARKETS - APPLICATIONS

By Tons

Source: Provisional Data, AWA Metallized Films & Papers: World Sourcebook 2006
Cigarette Packaging

Courtesy AWA Conferences/Cham Paper
FLEXIBLE PACKAGING
KEY MARKET SEGMENT – FLEXIBLE PACKAGING

Source: Provisional Data, AWA Metallized Films & Papers: World Sourcebook 2006
LABELING
KEY MARKET SEGMENT - LABELS

Source: Provisional Data, AWA Metallized Films & Papers: World Sourcebook 2006
World Market Shares by Labeling Technology, 2005

Source: AWA
Materials for Labels, 2005

Source: AWA
Materials for Metallized Labels, 2005

Source: AWA
Forecast Global CAGR% of Labeling Technologies, 2005 to 2010

Source: AWA
Product Decoration & Identification

DECORATION

IDENTIFICATION

![Product Decoration & Identification](image)
Substitution
Today – Choices & Technology

**DECORATION**

**IDENTIFICATION**
CONCLUSIONS
OPPORTUNITIES

• Flexible Packaging
  – Pouches
    • Stand up
    • Reclosable
    • Liquid
  – Barrier

• Labels
  – Monoweb wrap around – mineral waters
  – Shrink

• Packaging (General)
  – Geo expansion of cigarette packaging experiences
  – Aggressive developments of replacement for non barrier paper/alufoil laminates or developments of barrier with coatings/coex structures
THREATS

- Aluminium not an acceptable image in some regions (Nordic Countries; Germany; etc)
- Industry innovation needed in non packaging areas
- Lack of development of metallized papers outside labels & cigarettes
- Competition increasing from alternative coatings/packaging formats/metalllic inks
- Focus on costs/cost reduction
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Save 20% on the ONLY global reference and information source on the metallised paper and film market.

Prospectus

NEW and EXPANDED

METALLIZED PAPER & FILMS MARKET ASSESSMENT AND WORLD SOURCEBOOK 2006

MARKETS, MATERIALS AND TECHNOLOGIES

Worldwide Market Overview and Opportunities for Metallizing Companies and Suppliers

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