

VACUUM COATED & METALLIZED PRODUCTS MARKET GLOBAL REVIEW 2012

A GLOBAL MARKET REVIEW FOR PRODUCERS, MATERIAL
SUPPLIERS, AND ALL COMPANIES INVOLVED IN THE VACUUM
COATED, METALLIZED, & BARRIER MATERIALS MARKET



MAY 2012 SAMPLE

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AWA Alexander Watson Associates has been engaged in market research and consulting to the packaging, labeling, product decoration, and related sectors since the company was founded in 1971. The company's experience, expertise, and focus represent a strong base of knowledge of the materials, processes, and technologies in the industries it serves, as well as a fundamental understanding of those industries' structure and their constituent companies across the value chain. AWA's historical perspective on this specialized business sector is also extremely valuable in market analysis and in forecasting future expectations.

A key element in AWA's research methodology is the primary data collection phase, which includes direct discussions and interviews with a broad base of industry contacts throughout the value chain. AWA has direct access to executives and managers, technical experts, and other industry contacts at material suppliers, equipment manufacturers, coaters and laminators, printers, and end users. Access to such specialists, market data, market insights, trends, and alternative perspectives throughout the value chain ensures that AWA's research is thorough, robust, verified, and usable.

The primary research and data collection involved in this review included a mix of personal interviews and of telephone and e-mail interviews of leading label printers/converters, raw materials suppliers, end users, and industry experts; further complemented by online questionnaires to targeted companies.

In compiling the secondary research data for this study, AWA has

conducted a comprehensive search of relevant published information, including internet searches, external proprietary database searches, and other available secondary sources.

The company's focused and disciplined approach to this process, coupled with in-house expertise in secondary research, extensive proprietary in-house databases, and strong knowledge capital ensure targeted and comprehensive results. This subsequently provides the basis for the design of research questionnaires and interview discussion guides, the identification of data gaps, and assistance in the selection of appropriate targets used in the primary research phase.

AWA's research benefits strongly from this ability to cross-check data from a number of different industry-related perspectives and the company's own researches reinforcing the integrity and veracity of data.

After completion of data-driven research, AWA leverages its own market knowledge and experience to deliver insightful, on-target analysis through a broad series of interview contacts using a combination of Delphi and survey methods of research, and in-depth discussions and follow-up interviews. After cross-checking and verification with other industry experts to reach a consensus on all aspects, including volume estimates, the analysis phase is completed and the report compiled and written.

2.1 WORLD VACUUM COATED & METALLIZED PRODUCTS VOLUME/DEMAND

In 2011, the global production and use of vacuum coated films and papers is estimated at xxxxxxxx tons – an increase of ~x% on 2010 volumes.

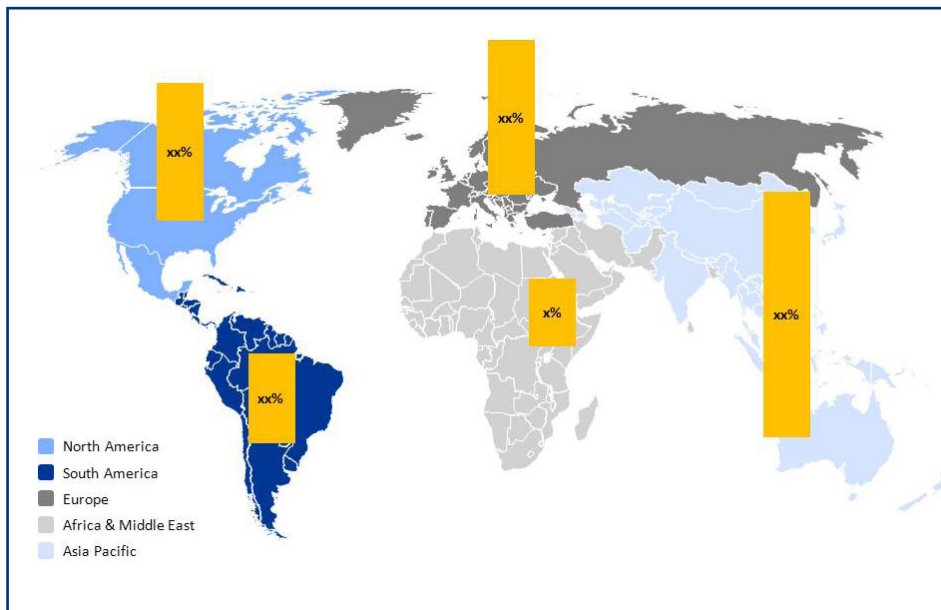


Exhibit 2.1: World Demand for Vacuum Coated Films & Papers 2011

Source: AWA

The relative global shares of the generic groups of vacuum coated products are shown in the following exhibits.

2.5 VACUUM COATED PRODUCTS MARKET GROWTH RATES

The growth rates for global and regional markets for vacuum coated products are shown in the following exhibit:

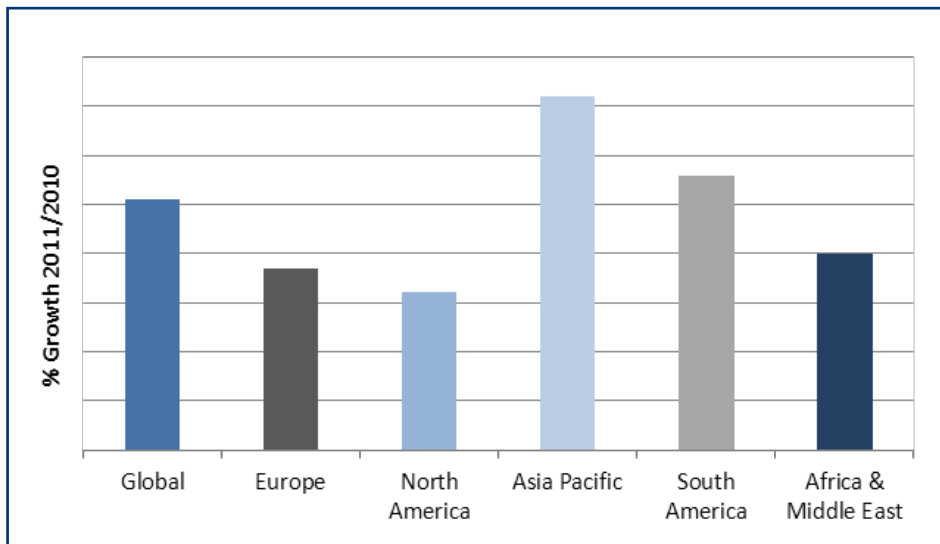


Exhibit 2.9: Global & Regional Vacuum Coated Products Market Growth Rates, 2011/2010

Source: AWA

Global & Regional Vacuum Coated Products Market Growth Rates, 2011:

- XX
XX
- XX
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3. RAW MATERIAL ASSESSMENT & TRENDS

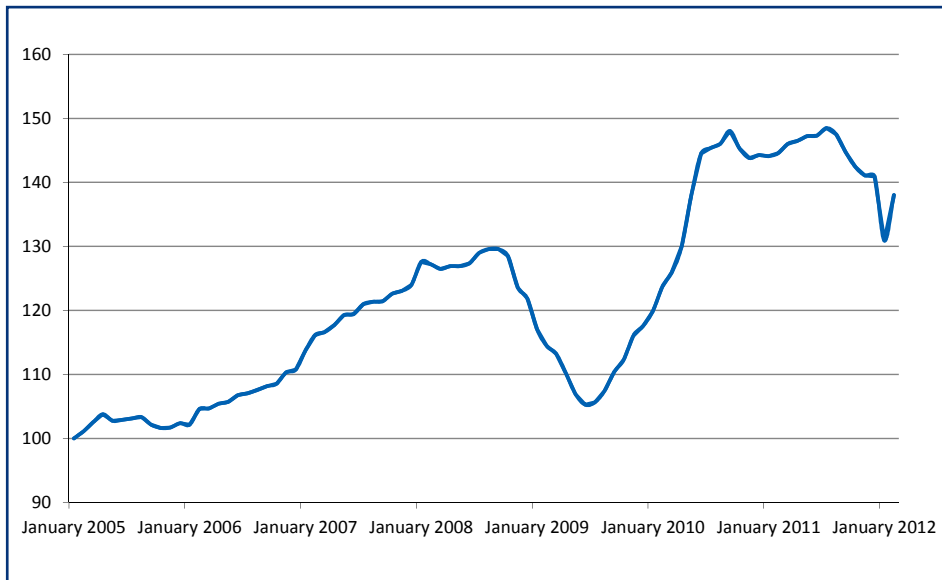


Exhibit 3.1: Woodpulp Producer Price Indexes, 2005-2011

Source: US Department of Labor
Bureau of Labor Statistics
Index figures: 100 = January 2005

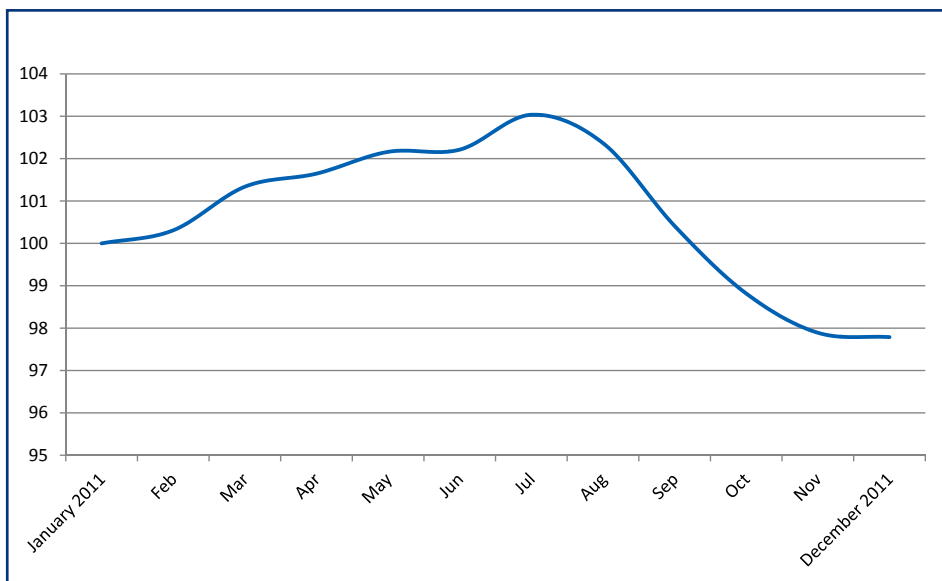


Exhibit 3.2: Woodpulp Producer Price Indexes, 2011

Source: US Department of Labor
Bureau of Labor Statistics
Index figures: 100 = January 2011