

**SPECIAL  
EMA MEMBER  
OFFER**

**PROSPECTUS**

***NEW and EXPANDED***

**METALLIZED PAPERS & FILMS  
WORLD SOURCEBOOK 2004**

**MARKETS, MATERIALS AND  
TECHNOLOGIES**

**Worldwide Market Overview and  
Opportunities for Metallizing  
Companies and Suppliers**

**AWA Alexander Watson Associates BV**

Koningin Wilhelminaplein 13  
2.09.09 (Tower 2, 9th Floor, Suite 9)  
P.O. Box 69035  
1060 CA Amsterdam  
The Netherlands

Tel: +31 (20) 676.2069

Fax: +31 (20) 676.2375

[www.awa-bv.com](http://www.awa-bv.com)

Supported by:





**CONTENTS**

- 1. Introduction**
- 1.1 Definitions
- 1.2 Methodology
- 1.3 Abbreviations
- 2. Executive Summary**
- 3. Market Structure**
- 3.1 Raw Material Suppliers
- 3.1.1 Paper Suppliers
- 3.1.2 Film Suppliers
- 3.1.3 Coating Suppliers
- 3.2 Metallizing Companies
- 3.2.1 European Metallizers
- 3.2.2 North American (NAFTA) Metallizers
- 3.2.3 Asian Metallizers
- 3.2.4 South American Metallizers
- 3.2.5 Rest of the World Metallizers
- 3.3 In-House Metallizers
- 3.4 Contract & Commercial Metallizers
- 3.4.1 Contract Metallizing
- 3.4.2 Commercial Metallizing
- 3.5 Capacity Trends
- 4. Demand for Metallized Products**
- 4.1 Worldwide Market by Region
- 4.2 Trade between Regions
- 4.3 Key Demand Influences & Market Drivers
- 4.4 Demand Outlook by Region
- 5. Demand for Metallized Products in Europe**
- 5.1 European Market Overview
- 5.2 European Metallized Film Markets
- 5.2.1 European Metallized Polypropylene Film Market
- 5.2.2 European Metallized Polyester Market
- 5.2.3 European Metallized PVC Film Market
- 5.2.4 Other European Metallized Films
- 5.3 European Metallized Paper & Board Market
- 5.3.1 European Metallized Paper Market
- 5.3.2 European Metallized Board Market
- 5.3 Other European Metallized Materials
- 5.4 Value Chain – European Metallized Market
- 6. Demand for Metallized Products in North America**
- 6.1 North American Overview
- 6.2 North American Metallized Film Market
- 6.2.1 North American Metallized Polypropylene Film Market
- 6.2.2 North American Metallized Polyester Film Market
- 6.2.3 Other North American Metallized Films
- 6.3 North American Metallized Paper & Board Market
- 6.3.1 North American Metallized Paper Market
- 6.3.2 North American Metallized Board Market
- 6.4 Other North American Metallized Materials
- 6.5 Value Chain – North American Metallized Market

- 7. Demand for Metallized Products in Asia**
- 7.1 Asia Market Overview
- 7.2 Asia Metallized Film Markets
- 7.2.1 Asia Metallized Polypropylene Film Market
- 7.2.2 Asia Metallized Polyester Film Market
- 7.2.3 Other Asia Metallized Films
- 8. Demand for Metallized Products in South America**
- 8.1 South American Overview
- 8.2 South American Metallized Film Market
- 8.3 South American Metallized Paper & Board Market
- 9. Demand for Metallized Products in Rest of the World**
- 9.1 Rest of the World Market Overview
- 9.2 Rest of the World Metallized Film Market
- 9.3 Rest of the World Metallized Paper & Board Market
- 10. Market Innovations & Opportunities**
- 10.1 Holographic Market Developments
- 10.2 Clear Oxide Coatings
- 10.3 Trends in Machine Management and Operational Efficiencies
- 11. Material Trends**
- 11.1 Papers & Boards
- 11.1.1 Papers
- 11.1.2 Board
- 11.2 Films
- 11.2.1 Polypropylene
- 11.2.2 Polyester
- 11.2.3 Other Films
- 11.3 Other Materials
- 11.3.1 Cellulose Films
- 11.3.2 Textiles & Non-woven
- 11.4 Material Prospects
- 11.5 Raw Material Price Trends
- 11.6 Environmental Issues
- 12. Future for Metallizing**
- 12.1 Demand / Supply for Metallizing
- 12.2 Developments in Metallizing
- 12.3 Competing Technologies
- 12.4 Aluminium Foil Trends
- 12.5 International Trends & Globalization
- 12.6 Purchasing trends
- 12.7 Future Threats & Opportunities
- 13. Individual Company Profiles**
- 13.1 Metallizing Companies
- 13.2 Material Suppliers
- 13.3 Equipment Suppliers
- 14. Appendices**

**INDIVIDUAL COMPANY PROFILES**

Comprehensive profiles of leading metallizing companies, suppliers to the industry and equipment manufacturers will be provided in the report.

**AWA Alexander Watson Associates BV**

Koningin Wilhelminaplein 13  
 2.09.09 (Tower 2, 9th Floor, Suite 9)  
 P.O. Box 69035  
 1060 CA Amsterdam  
 The Netherlands  
 Tel: +31 (20) 676.2069  
 Fax: +31 (20) 676.2375  
 www.awa-bv.com

**AWA Alexander Watson Associates**

North American Office  
 7429, Seneca Ridge Drive  
 McLean, VA 22102  
 USA  
 Tel: +1 (703) 821 3853  
 Fax: +1 (703) 821 3854

## Metallized Papers & Films World Sourcebook 2004

### SUBSCRIPTION

€ 3,800 NORMAL PRICE  
€ 3,400 PRE-PUBLICATION PRICE for subscription received  
and paid before publication  
€ 2,800 EMA membership price  
€ 150 for each additional copy

\* with this subscription please send me additional  
copies at € 150 per copy.

Indicate the # of additional copies \_\_\_\_\_

There is a € 45 charge for normal handling and shipping.  
If express delivery is required, it will be provided at cost.

Yes, I would like to subscribe to this report

\_\_\_\_\_ please send an invoice to the address below

\_\_\_\_\_ payment will be made by credit card

\_\_\_\_\_ payment has been transferred to bank  
account number ING 66.40.32.923  
Iban: NL 16 INGB 0664 0329 23  
Swift (BIC): INGBNL2A

\_\_\_\_\_ payment is enclosed

Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Postcode \_\_\_\_\_

Country \_\_\_\_\_

VAT # (EU) \_\_\_\_\_

Telephone \_\_\_\_\_

Fax \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

### NEW and EXPANDED

### METALLIZED PAPERS & FILMS WORLD SOURCEBOOK 2004

### MARKETS, MATERIALS AND TECHNOLOGIES

### Worldwide Market Overview and Opportu- nities for Metallizing Companies and Suppliers

To pay by Credit Card:

Amex       Eurocard       Visa

Cardnumber \_\_\_\_\_

Expiry date \_\_\_\_\_

For **Eurocard** please state CVC code: \_\_\_\_\_

Cardholder \_\_\_\_\_

Cardholder address \_\_\_\_\_  
\_\_\_\_\_

Signature \_\_\_\_\_

Payments by credit card are subject to a 7% upcharge

10/04

### AWA Alexander Watson Associates BV

Koningin Wilhelminaplein 13  
2.09.09 (Tower 2, 9th Floor, Suite 9)  
P.O. Box 69035  
1060 CA Amsterdam  
The Netherlands  
Tel: +31 (20) 676.2069  
Fax: +31 (20) 676.2375  
www.awa-bv.com

### AWA Alexander Watson Associates

North American Office  
7429, Seneca Ridge Drive  
McLean, VA 22102  
USA  
Tel: +1 (703) 821 3853  
Fax: +1 (703) 821 3854