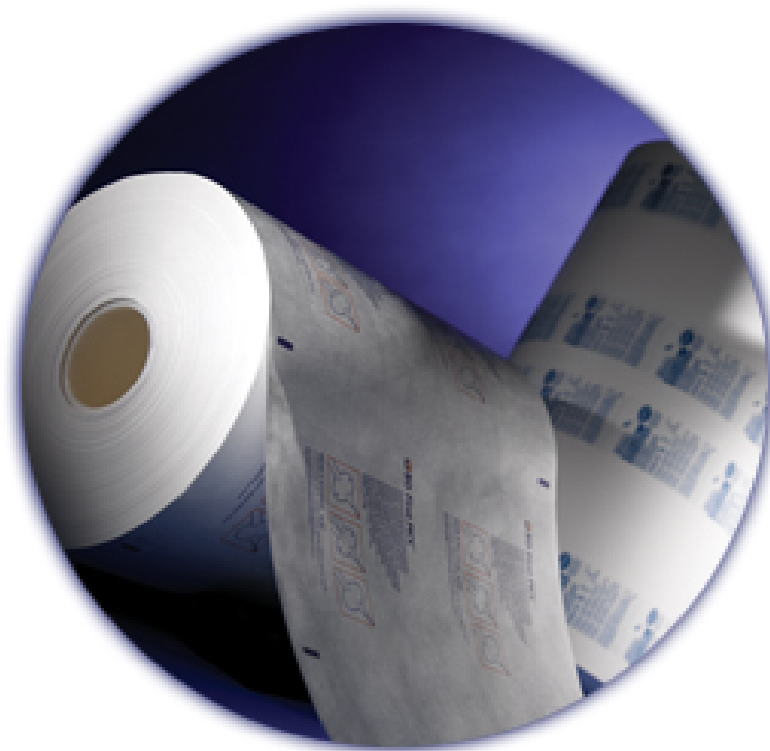




# Thai Film Industries Plc.





## TOPICS OF TODAY

*World BOPP Demand VS. Supply*

*History of Pricing*

*TFI Expansion Plan*

*Q & A*



# BOPP DEMAND VS. SUPPLY



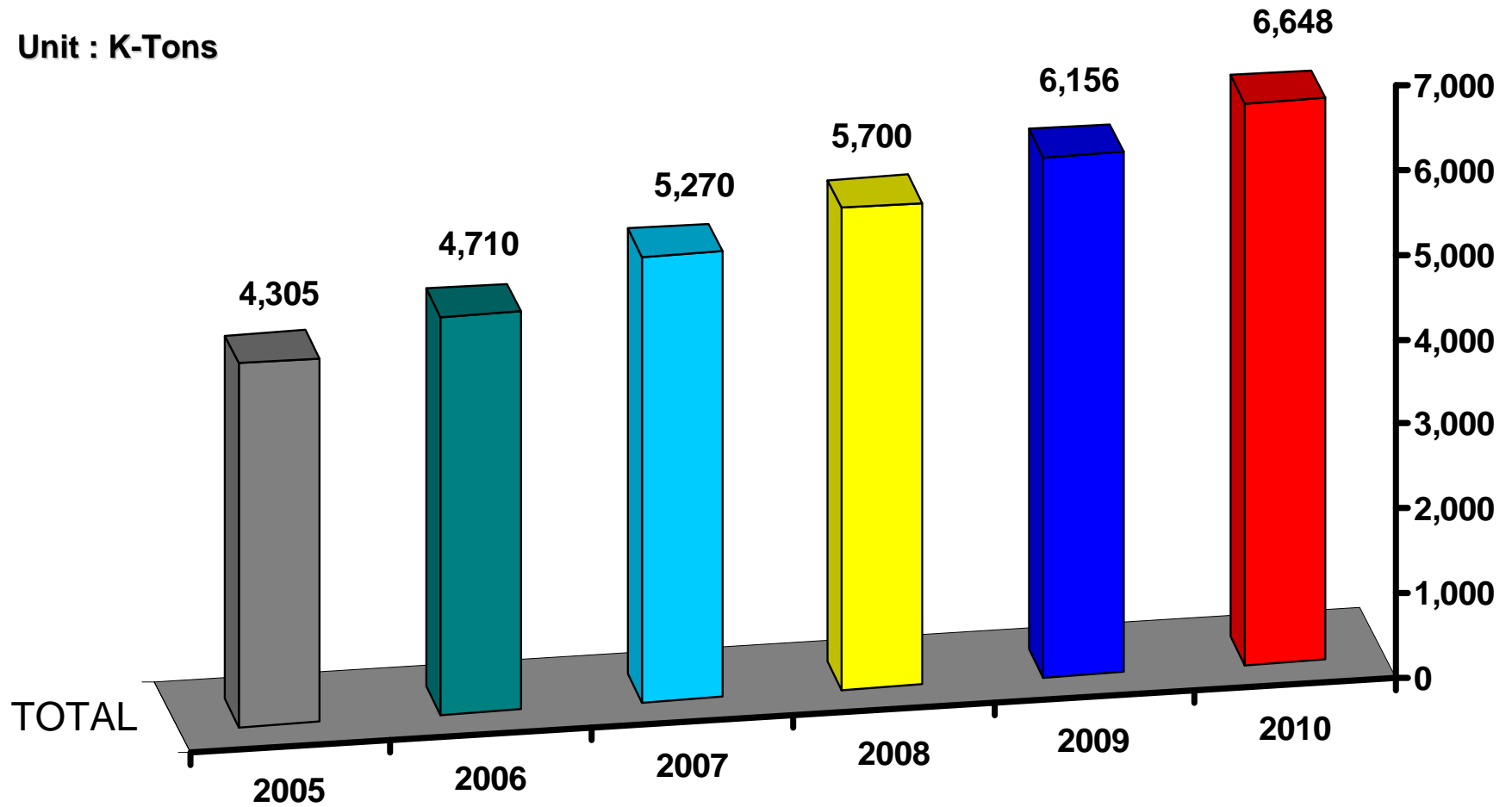
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## WORLD BOPP DEMAND (BY YEAR)

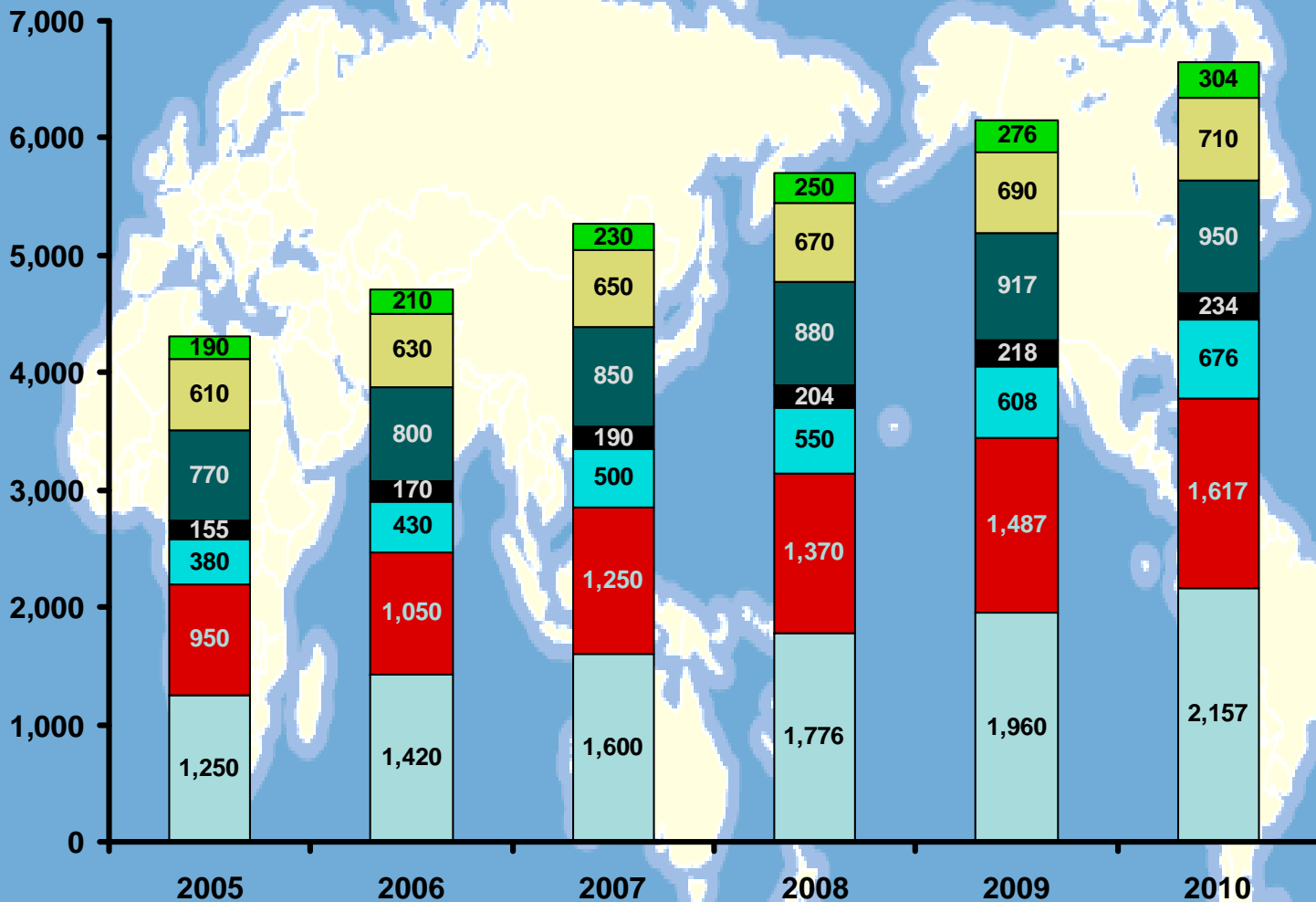
Unit : K-Tons





# WORLD BOPP DEMAND (BY ZONE)

Unit : K-Tons



■ China 
 ■ Far East 
 ■ Middle East 
 ■ Eastern Europe 
 ■ Western Europe 
 ■ NAFTA 
 ■ Latin America

Source : Bruckner

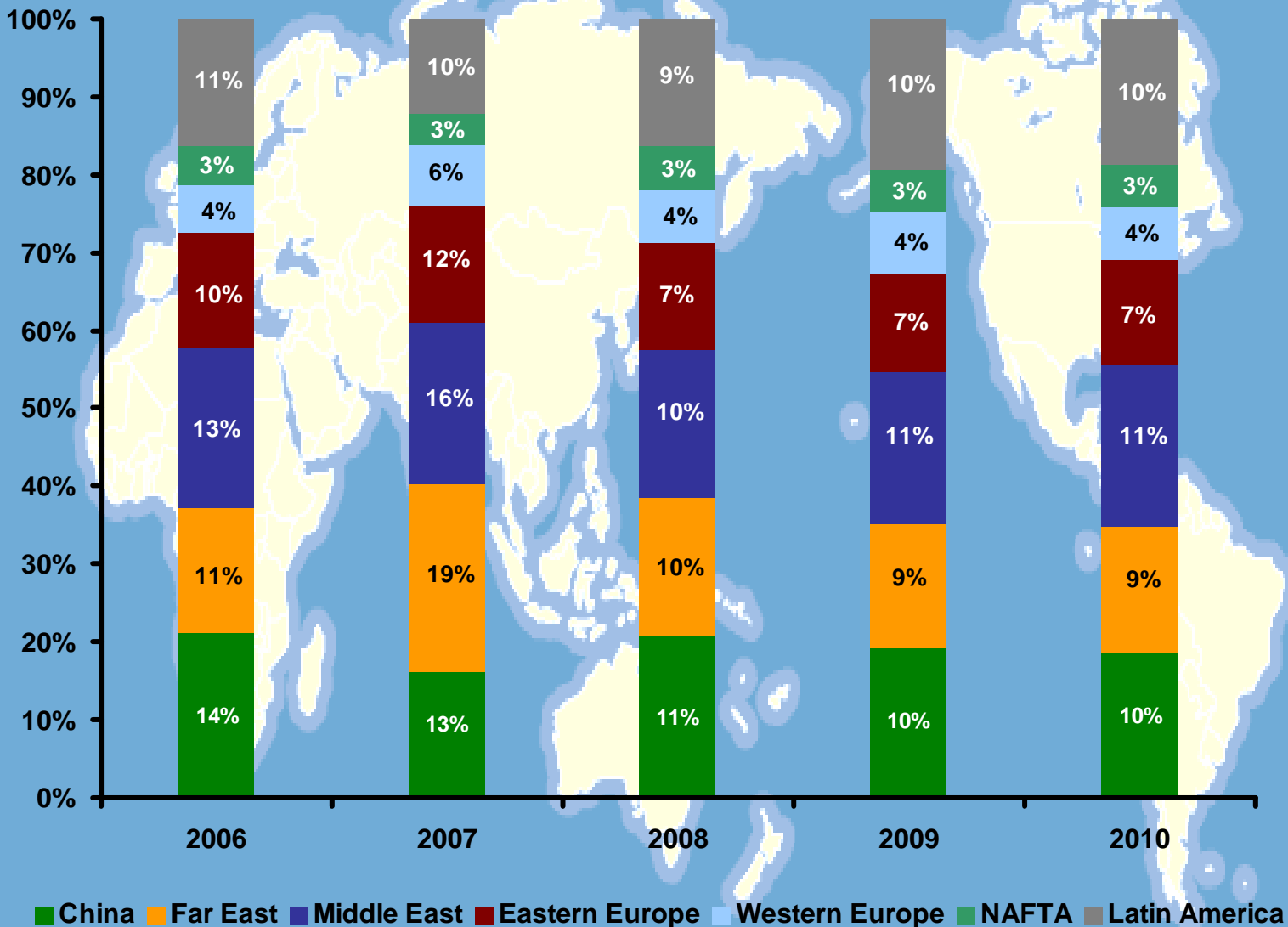


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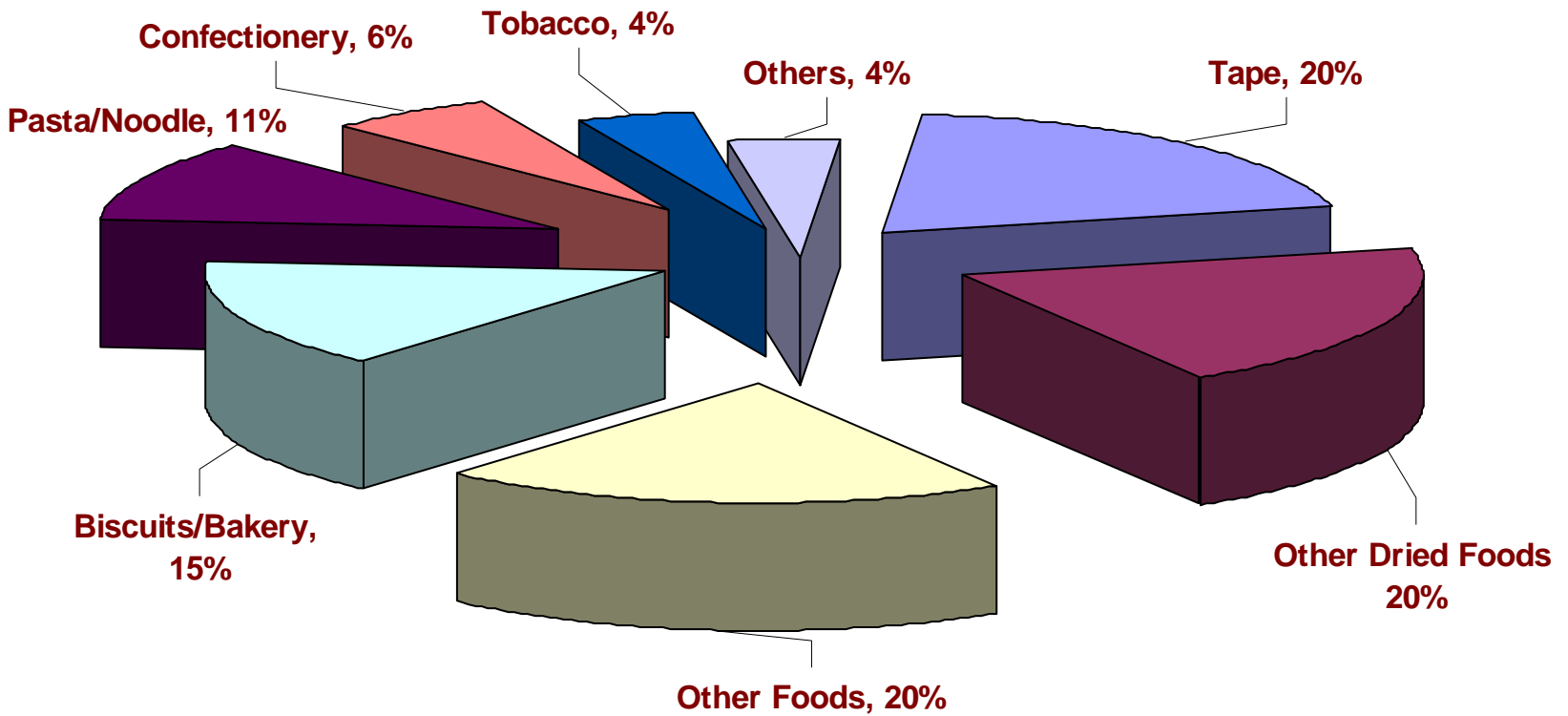


## GROWTH (BY ZONE)





# WORLD BOPP DEMAND BY APPLICATION



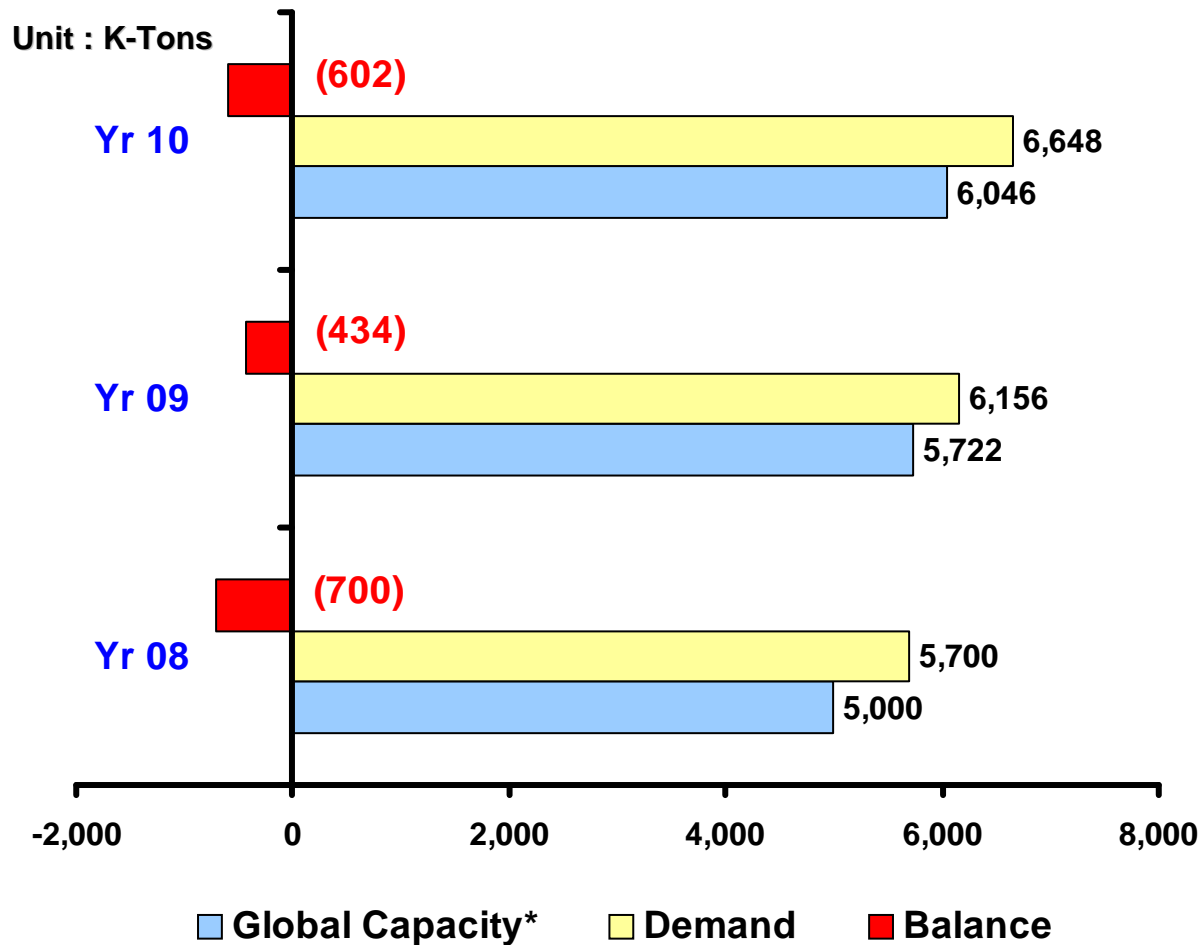
- Tape
- Other Dried Foods
- Other Foods
- Biscuits/Bakery
- Pasta/Noodle
- Confectionery
- Tobacco
- Others

Source : AMI





# WORLD BOPP DEMAND VS. SUPPLY



\* Global capacity used at 85% utilization

\*\* Capacity in year 2010, not include new machines which not ordered.

- Growth at 8% per years (= 456,000 tons in year 09 and 492,000 tons in 2010)



Source : Bruckner





## Sample of new capacities 2008-2010



### ASIA

- China : Fujian Fuzhou Jingtai (8.2m. line), Zhejiang Baihui (8.2m.line)
- India : Cosmo ( 8.2m. line), Jindal(8.7m. line),Polyplex (8.7m.line)
- Thailand : AJ Plast (8.2m.line)

### MIDDLE EAST

- U.A.E : Flex Middle East (8.7m.line)
- Saudi Arabia : Roward National (8.2m.line)



## Sample of new capacities 2008-2010

### NAFTA

- USA : Vifan (8.2m.line)
- Mexico : Altopro S.A. (8.2m.line)

### EUROPE

- Russia : Biaxplen, Euromet (8.2m.line)
- France : Toray Film ( 8.2m.line)
- Turkey : Turkmenneftgas ( 7.2m.line)

### SOUTH AMERICA

- Brazil : Polo (8.2m.line), Vitopel (8.2m.line)





***There were some BOPP plants were shut down during last few years***

## **Asia**

- **Indonesia Diaz, PT Poly Darya, and Tri Polita**
- **China close 12 factories with capacity approximate 300,000 tons/year**

## **Europe**

- **Rhone Poulenc Films in France**
- **Moplefan in Italy.**
- **Hoechst in Germany**
- **Shorko and ICI in U.K.**

## **Australia**

- **ICI**



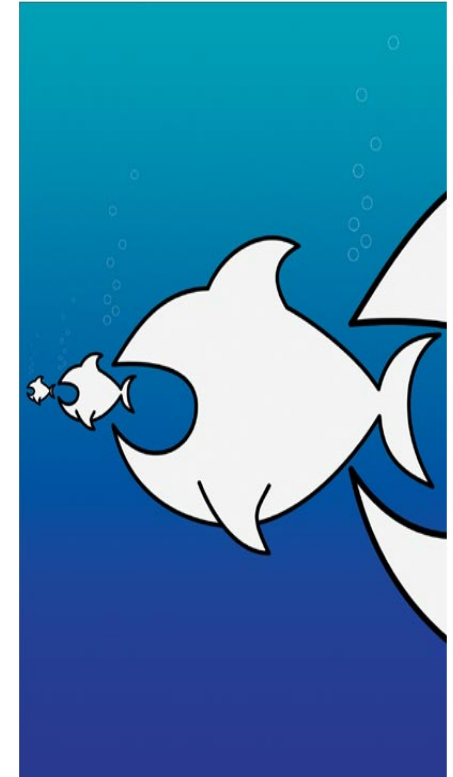


## *Some were merged and acquired...*

- **Hoechst (Germany) was merged by Treophan.**
- **Shorko (U.K) and Radici (Italy) were taken over by Taghleef (Dubai film group).**
- **Manuli (Italy) now inviting new investors.**

## **Bulgaria**

- **Famtex was merged by Plastchim (supplier of PE films, PP and injection molds)**





## ***Growth of BOPP comes from...***

- 1. Increasing of world population**
- 2. Growing of economy in China, India, Russia, Brazil and etc.**
- 3. Substitution to other plastic films i.e. PE film, LDPE film, Cellophane film, PVC film and paper. In term of yield and price per sq.meter, BOPP film is better alternative.**
- 4. Increasing of consumption per capita in developing countries due to higher standard of living required such as in China, Indochina, India, South America and etc.**
- 5. Higher demand of consumer on sanitation and environmentally friendly issues.**

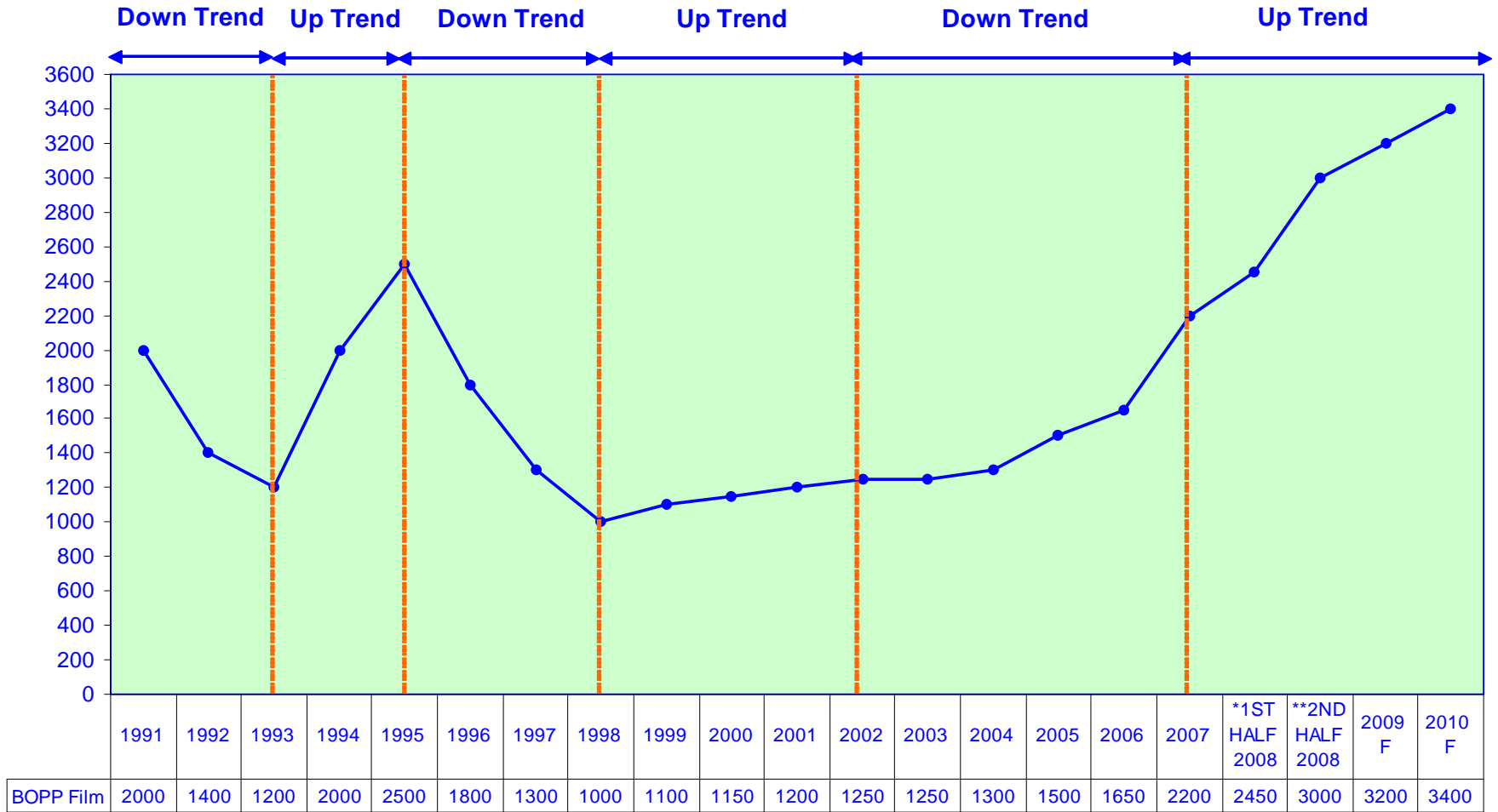


# HISTORY OF PRICING





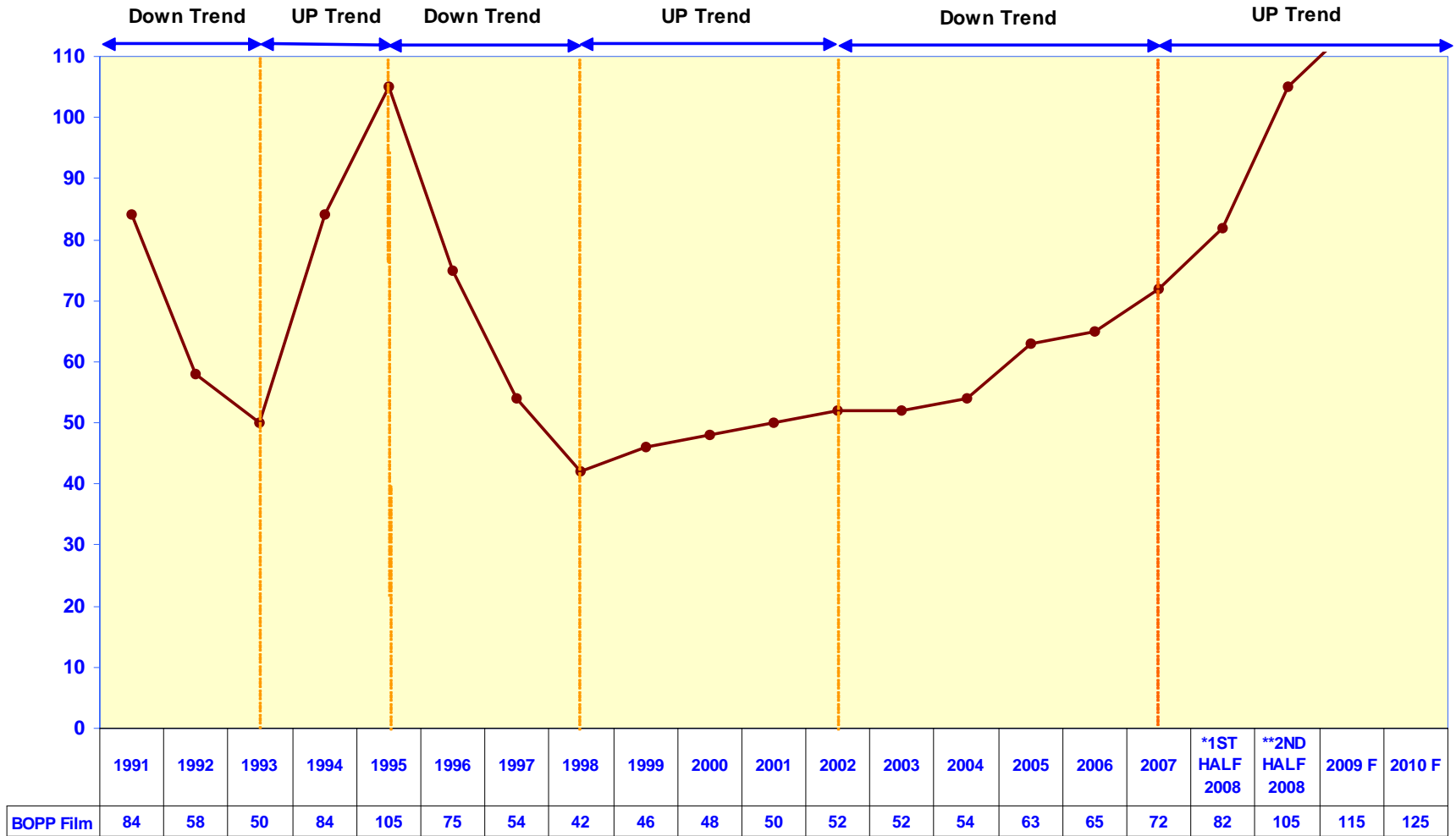
## 1998 - 2007 Historical Price BOPP Plain Film (Export Market)



Unit : US\$/Tons



## 1998 - 2007 Historical Price BOPP Plain Film (Domestic Market)



Exchange Rate 1998 - 2005 \$ = 40.00 , 2006 \$ = 38.00 , 2007 \$ = 34.00 , 2008F - 2010F \$ = 33.50



# TFI EXPANSION PLAN



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ISO 9001  
BUREAU VERITAS  
Certification



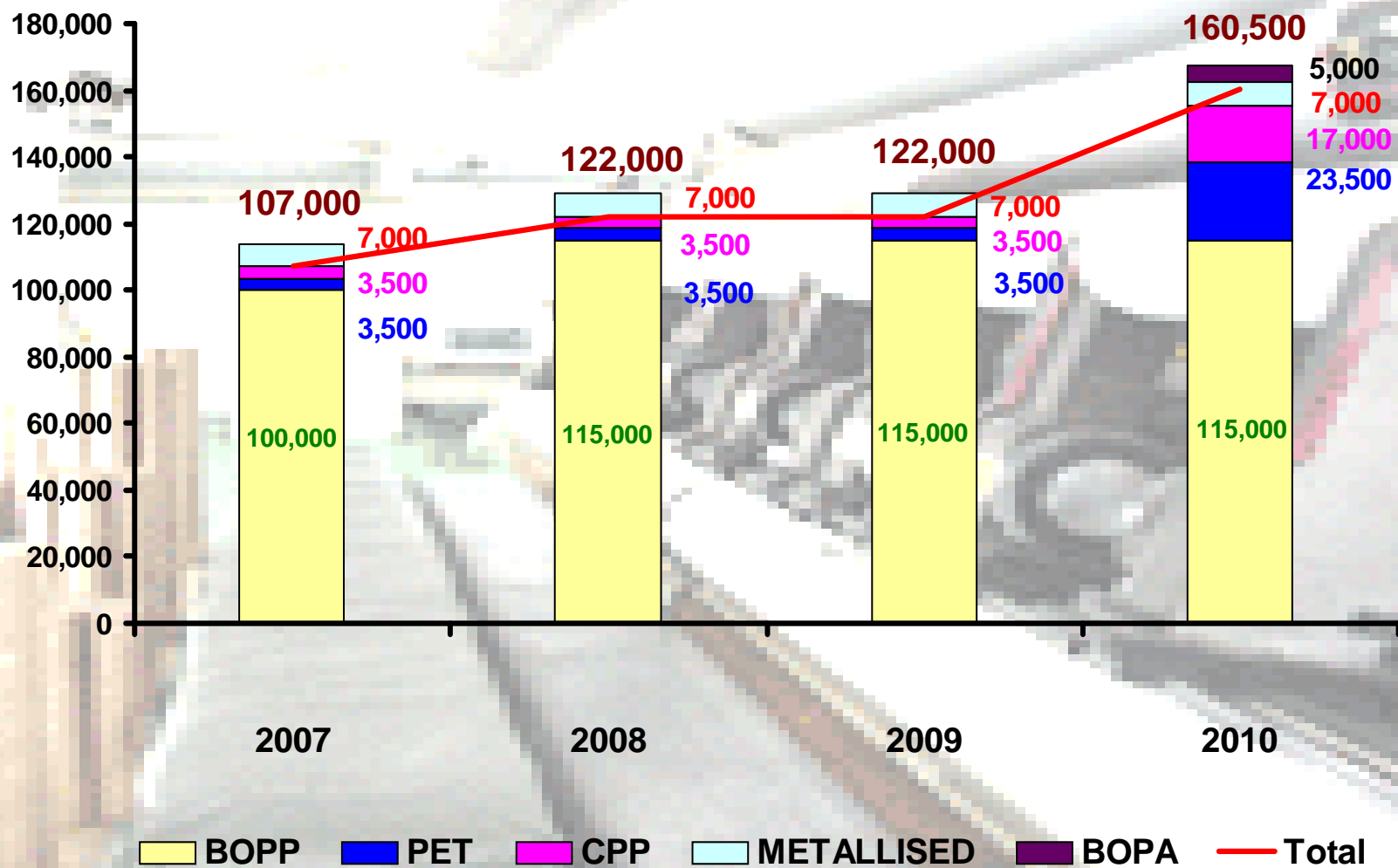
ISO 9001  
BUREAU VERITAS  
Certification





# TFI Expansion Plan 2008-2010

Unit : Tons/Year





*With Love  
Thank you for your attention*

*Wanlop Kunanukornkul*

*Thai Film Industries Public Co.,Ltd.*



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