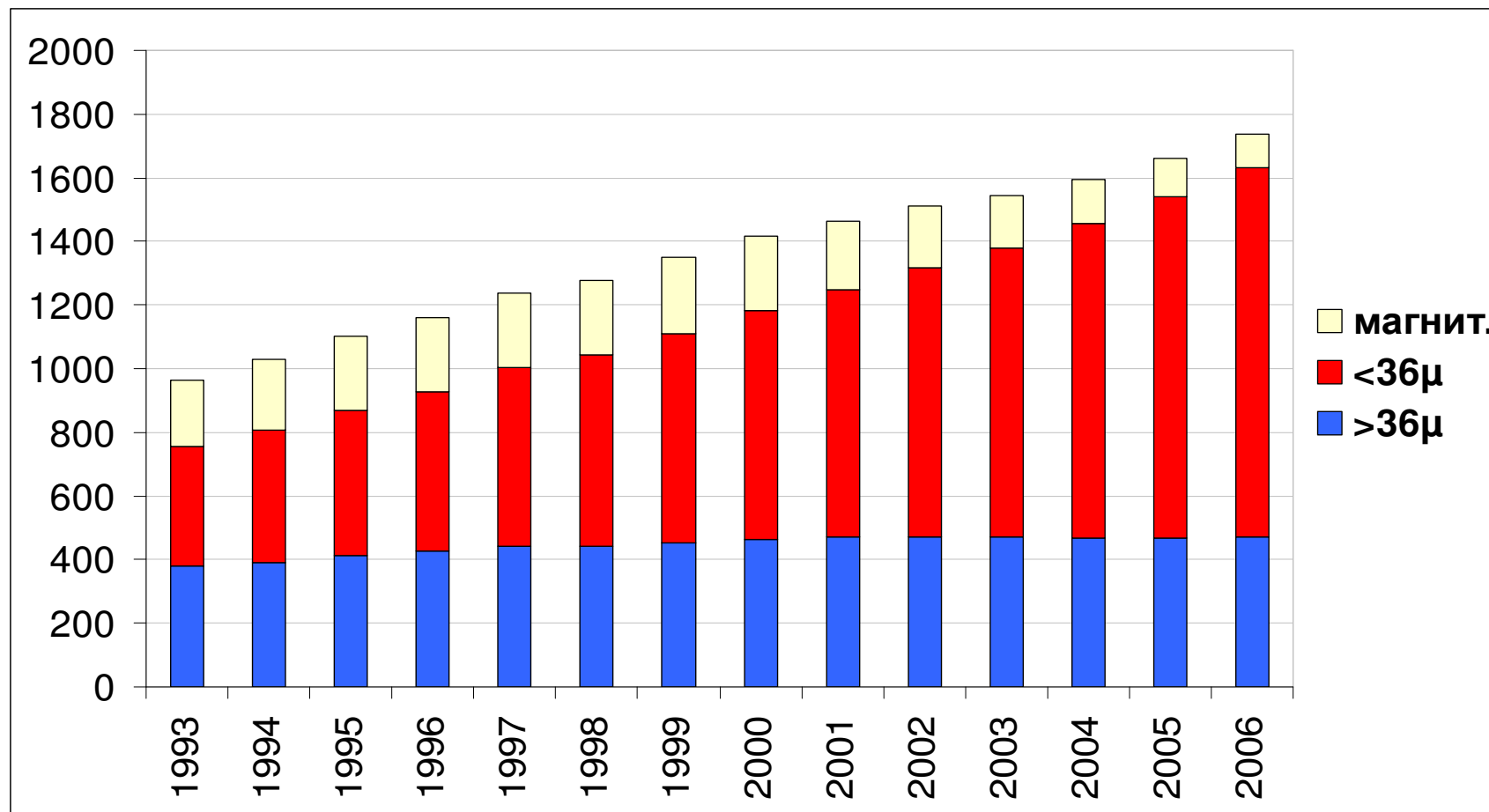
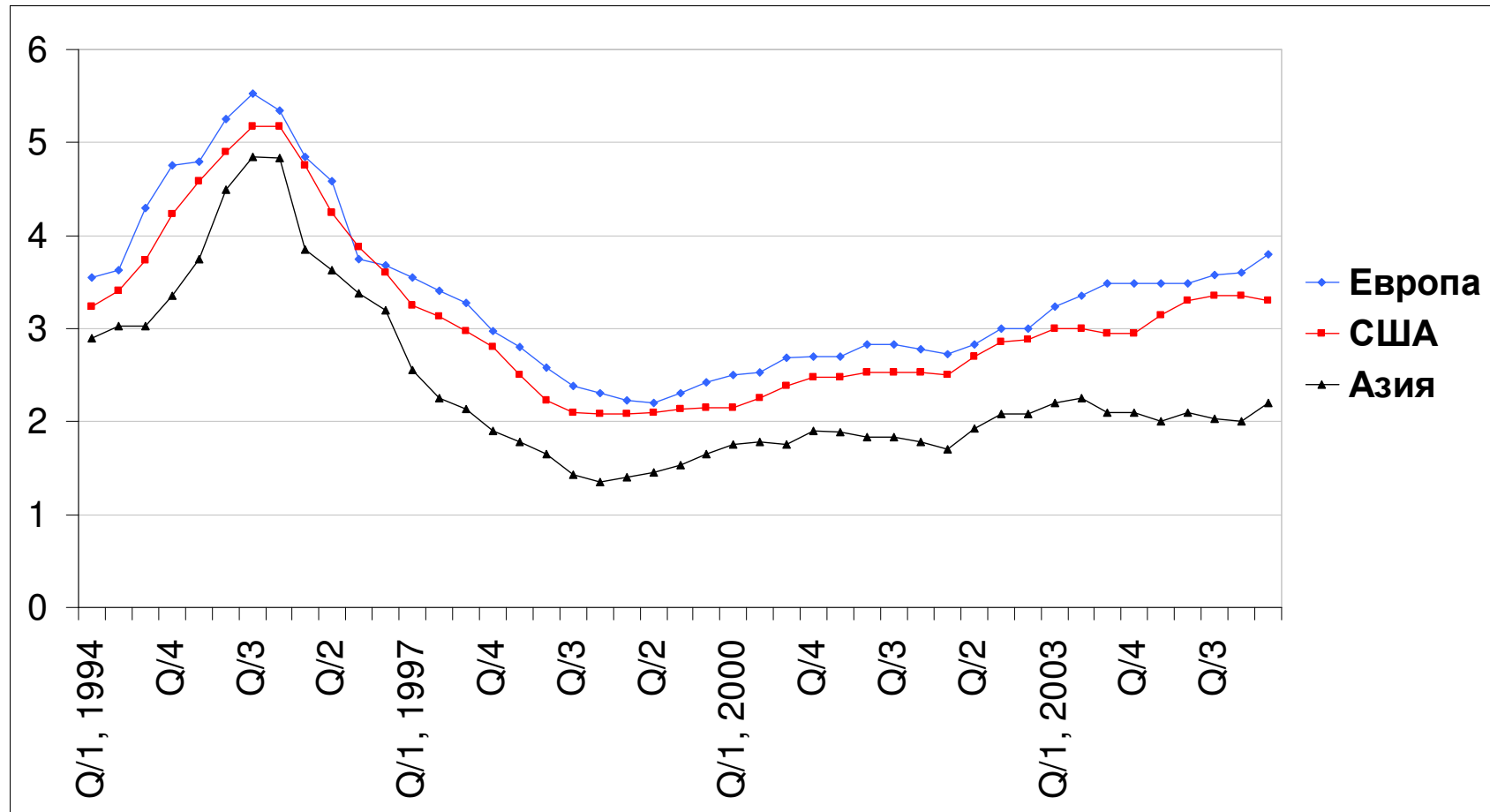


# Обзор мирового рынка БОПЭТ пленок

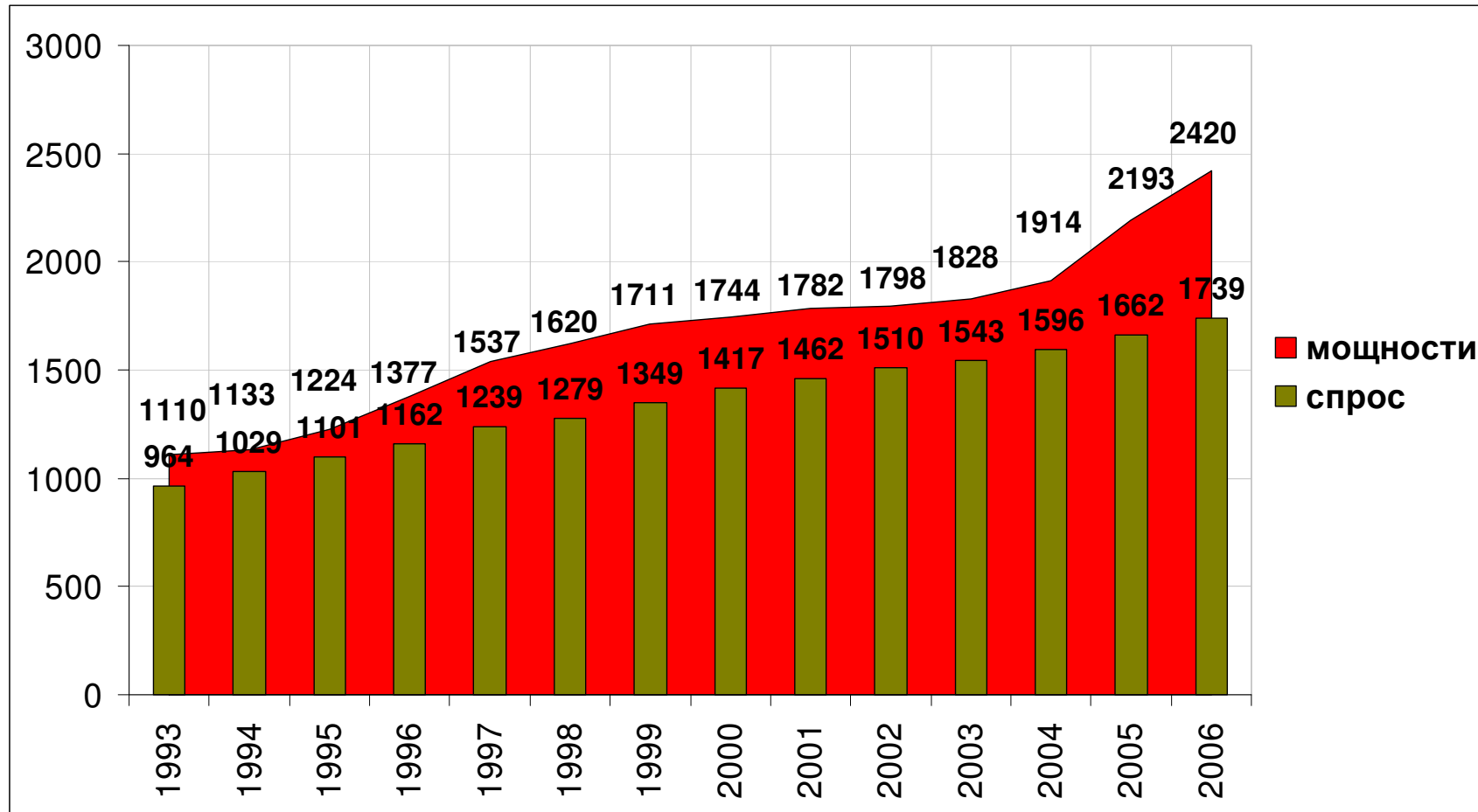
# Динамика мирового рынка



# Динамика цен на плёнки 12μ



# Мощности и спрос



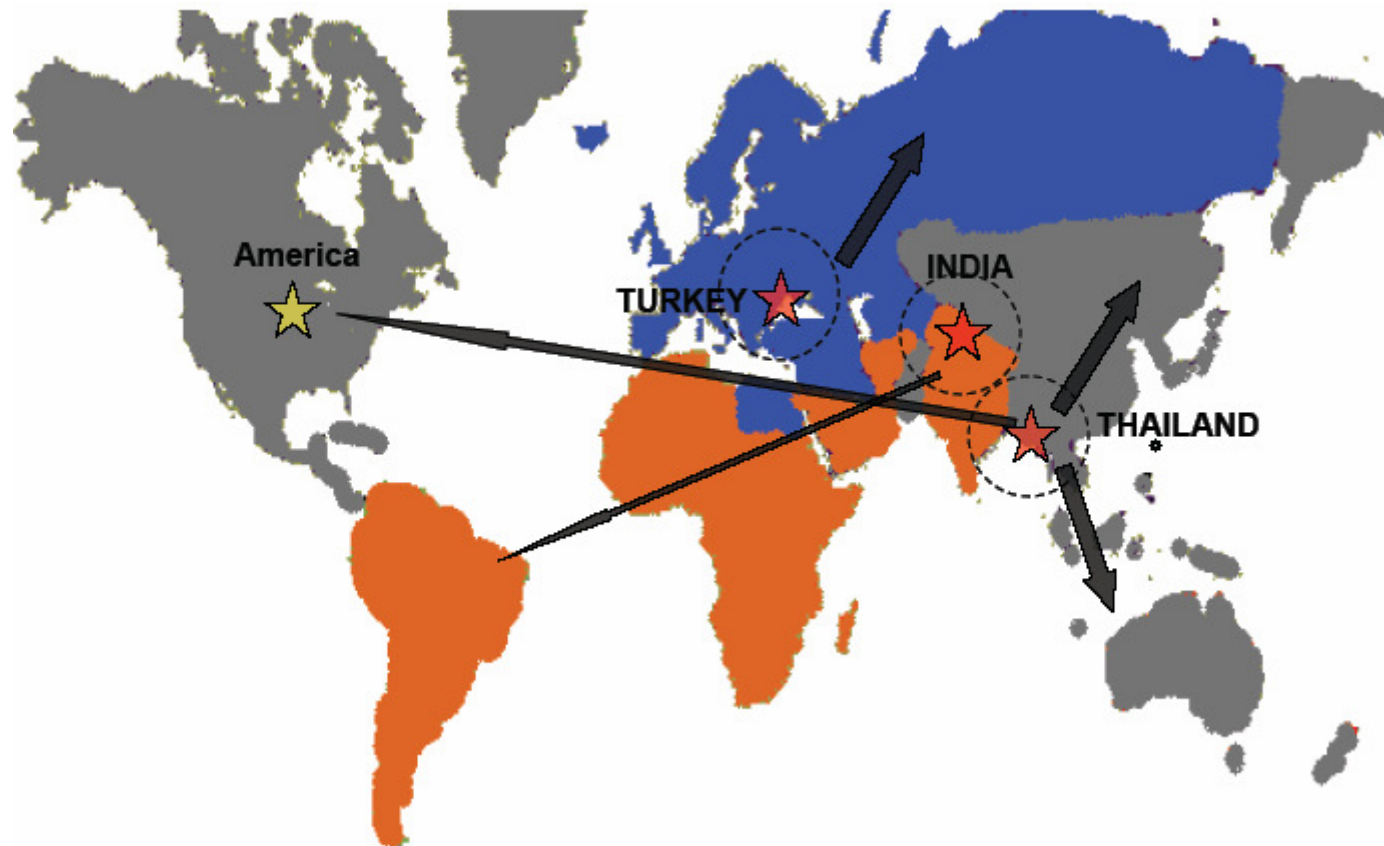
# Регулирование торговли

Year	Action	By	Against	Results	
■ 1988	Dumping	EU	Korea	Terminated without any measures	
■ 1990	Dumping	EU	Korea	Terminated without any measures	
■ 1991	Dumping	USA	Korea & Japan	Duties imposed, but over years are now minimal for Korea and the order was revoked with respect to Japan in 1995	
■ 1995	Dumping	EU	Korea	Terminated without any measures	
■ 1998	GSP Removal		USA	India	Preferential status removed and normal duty of 4.2% imposed
■ 1999	Subsidy	EU	India	CV duties between 3-19% imposed	
■ 2000	Dumping	China	Korea	Duties between 13-46% imposed	
■ 2000	Dumping	India	Korea & Indonesia	Duties between 0.16-0.92 \$/kg imposed	
■ 2000	Dumping	EU	India & Korea	Duties between 0-67% on Indians and 3-12% on Koreans imposed, Price Undertaking from Indian exporters accepted at margin elimination level	

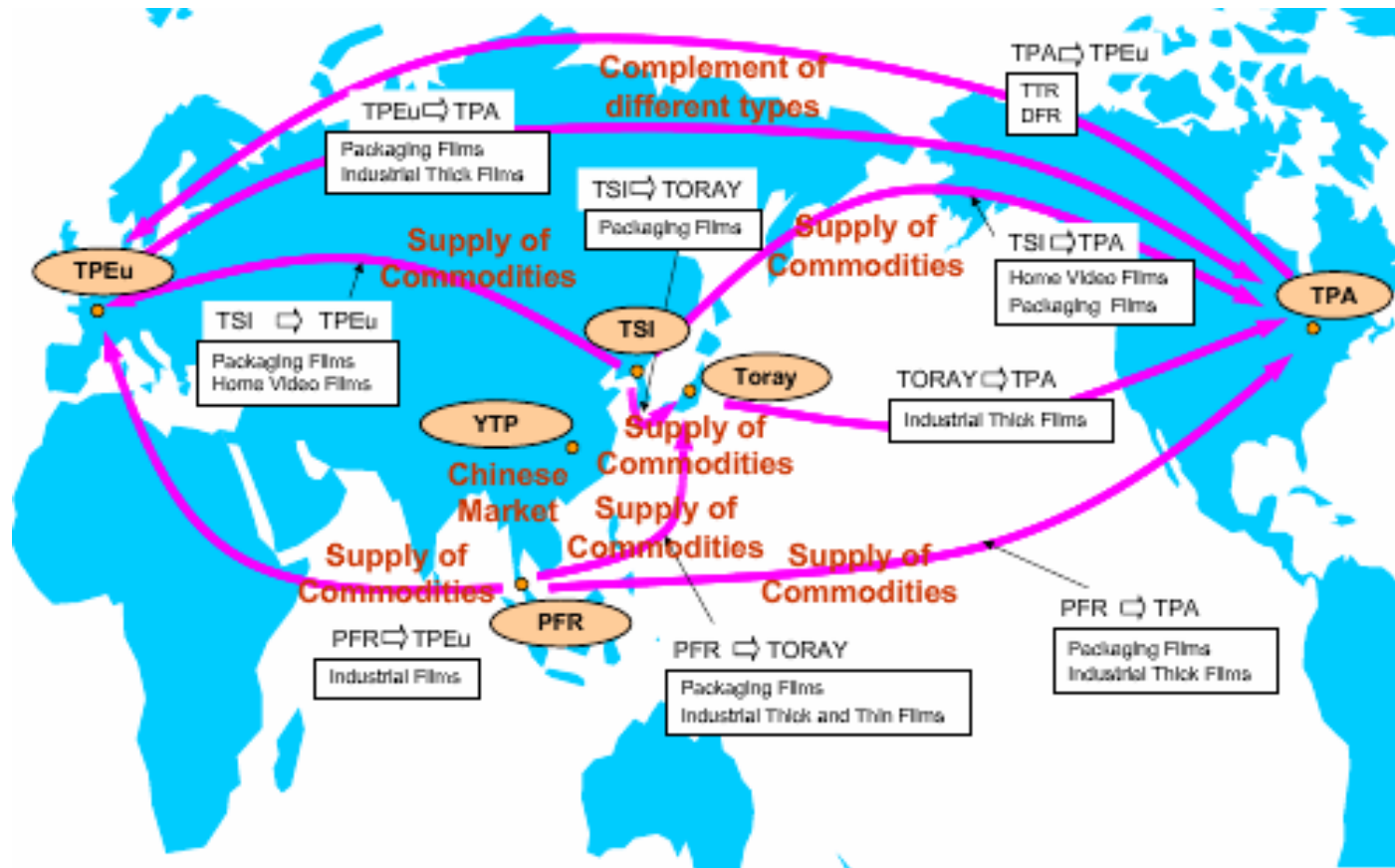
# Регулирование торговли

- 2002 Dumping & Subsidy USA India & Taiwan Duties between 19-30% on Indians and 2-3% on Taiwanese imposed
- 2002 Subsidy Brazil India No duties imposed due to lack of injury
- 2003 Dumping Brazil India Case withdrawn
- 2004 GSP Removal USA Thailand Removal of Preferential status- results in imposition of normal duty of 4.2%
- 2005 GSP EU Thailand GSP benefit extended. Imports from Thailand are being charged a normal duty of 3% instead of 6.5% effective from Jan 1, 2006
- 2005 Subsidy EU India Sunset review of CV duties completed. Duties extended for another 5 years
- 2005 Dumping EU India Price undertaking from Indian exporters withdrawn
- 2005 Dumping EU India Dumping Margin recomputed for Indian exporters from whom Undertaking was accepted initially. Duty imposed between 0-18%

# Межрегиональные связи

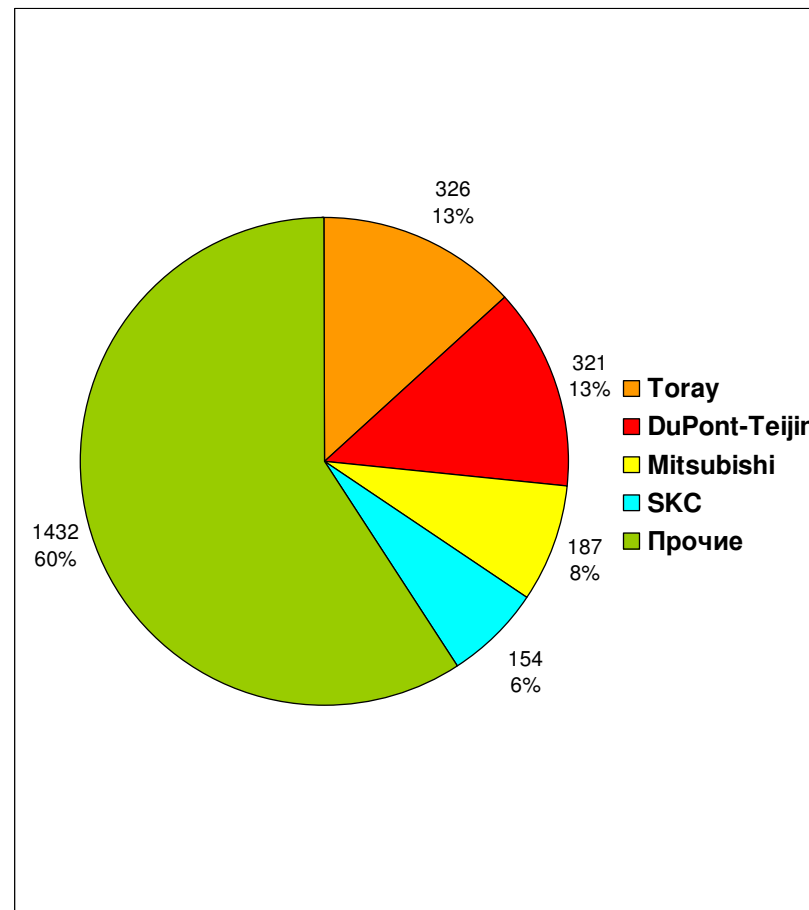
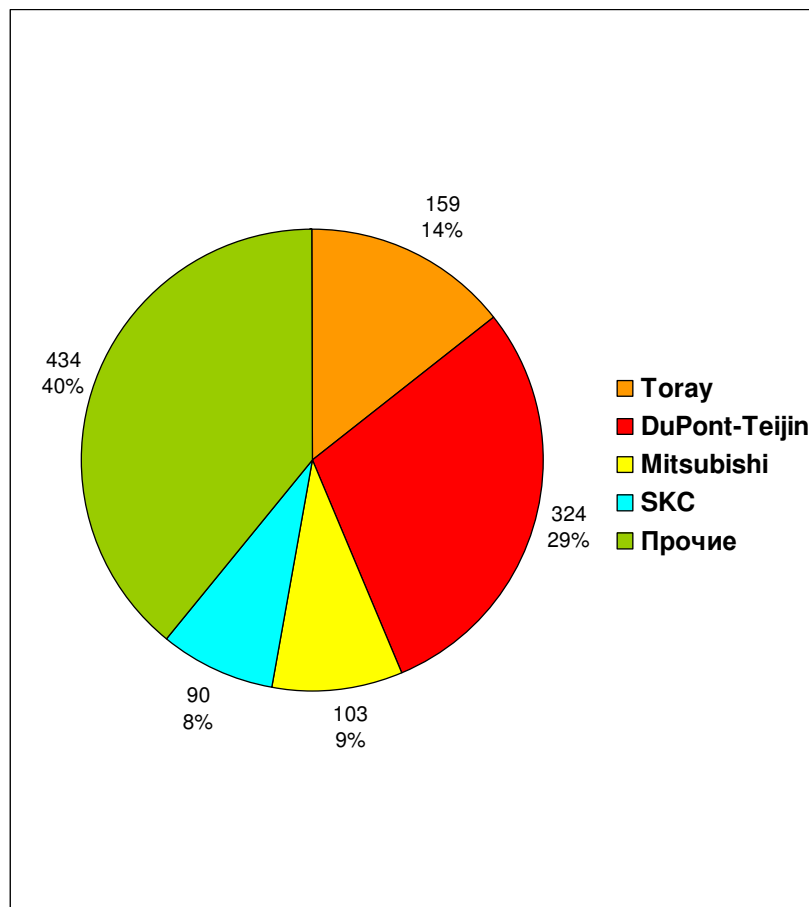


# Межрегиональные связи

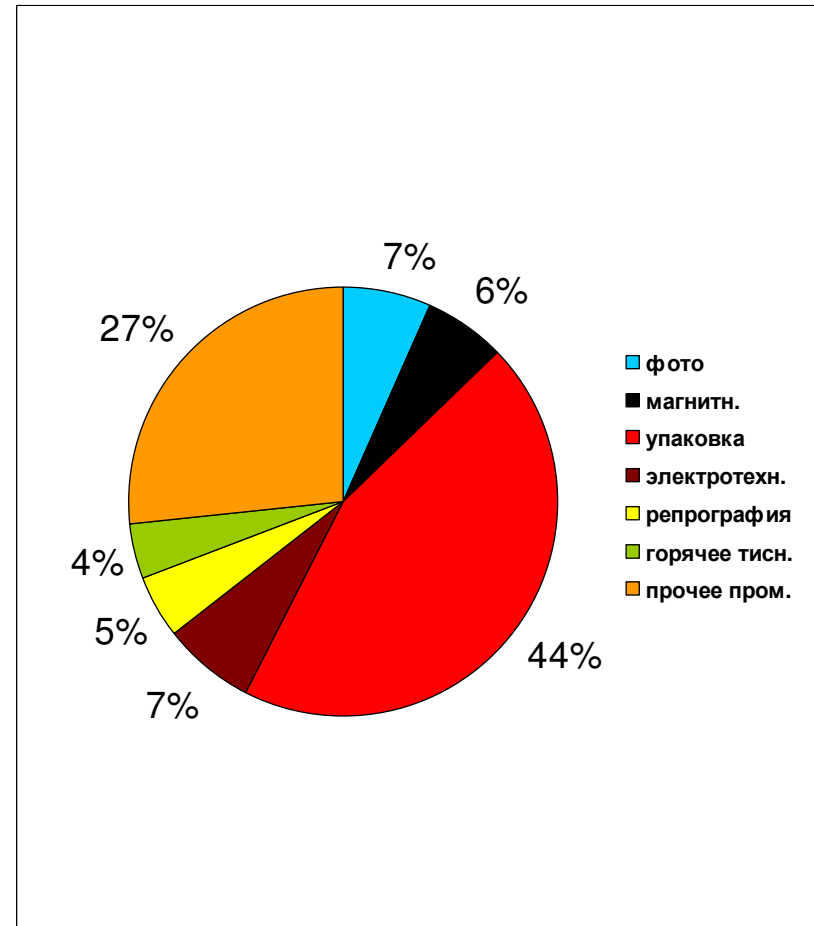
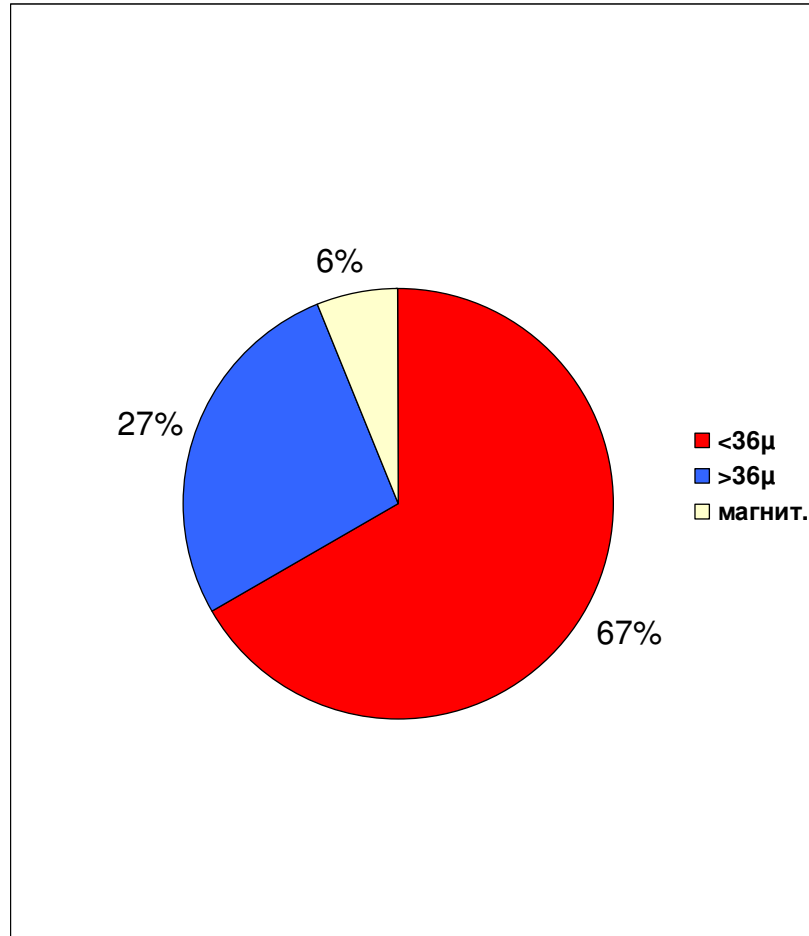




# Ведущие игроки 1993/2006



# Типы плёнок и применение



# Применение (LUMIRROR)

## Magnetic Applications

Home Video

Magnetic Tape

Digital Linear  
Tape (DLT)

Linear Tape  
Open (LTO)



## Packing Applications



## Industrial Applications

Electronic Components

Casting / Release

Label, Cards

Graphic Art Base, IC Card

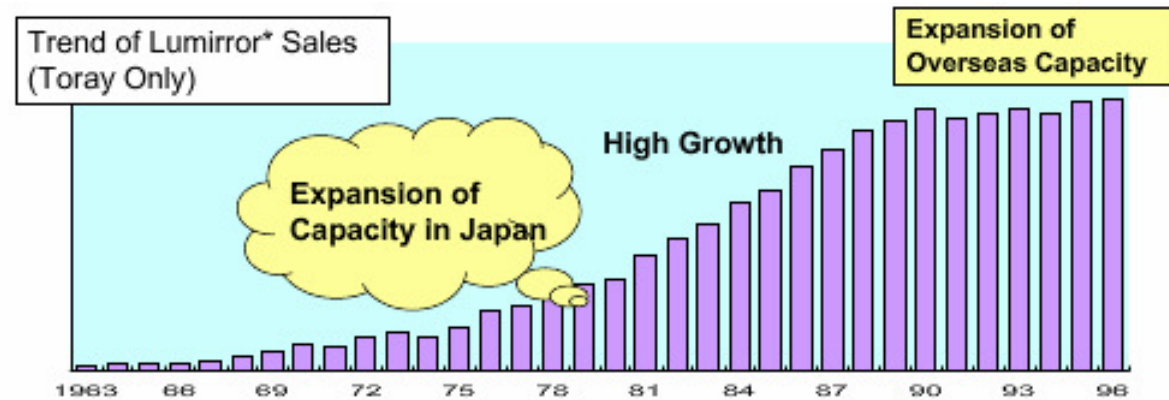
Optical (LCD, PDP)



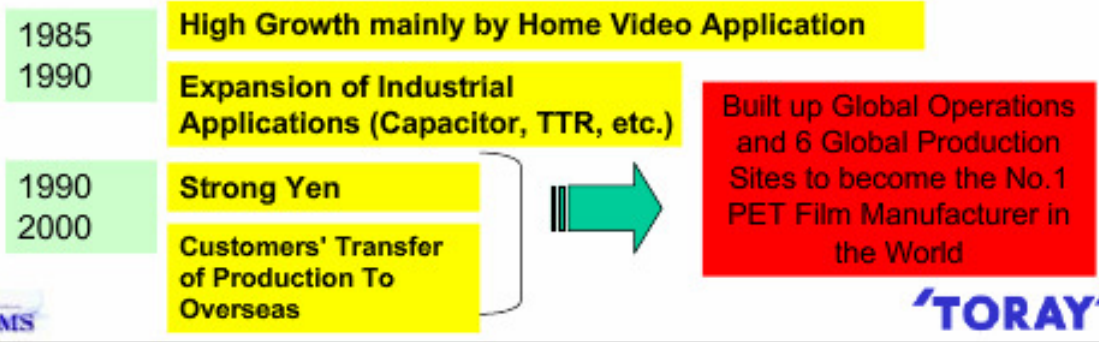
Capacitor



# Развитие

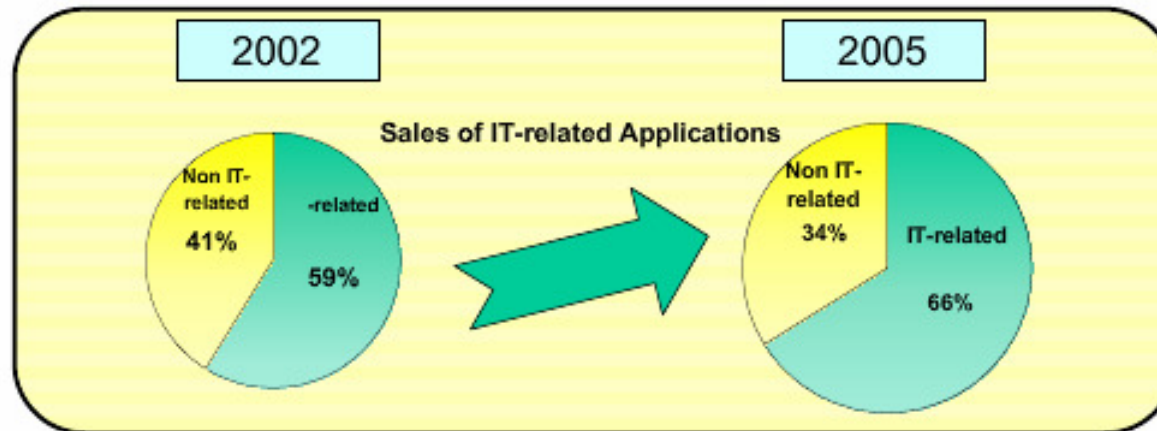


Lumirror\*, the Top PET Film Brand



# Развитие

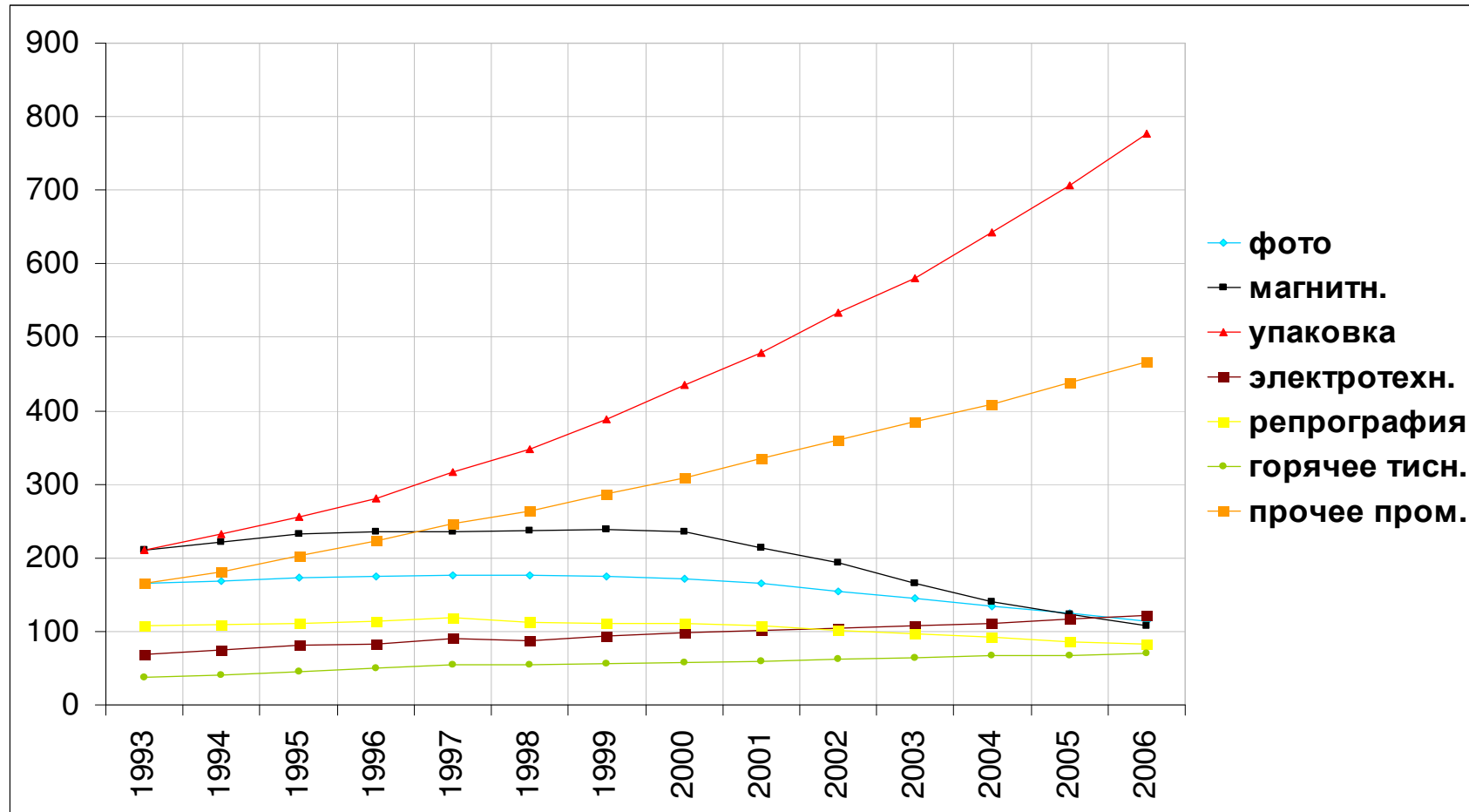
## 1) Expansion of IT-related Applications Market



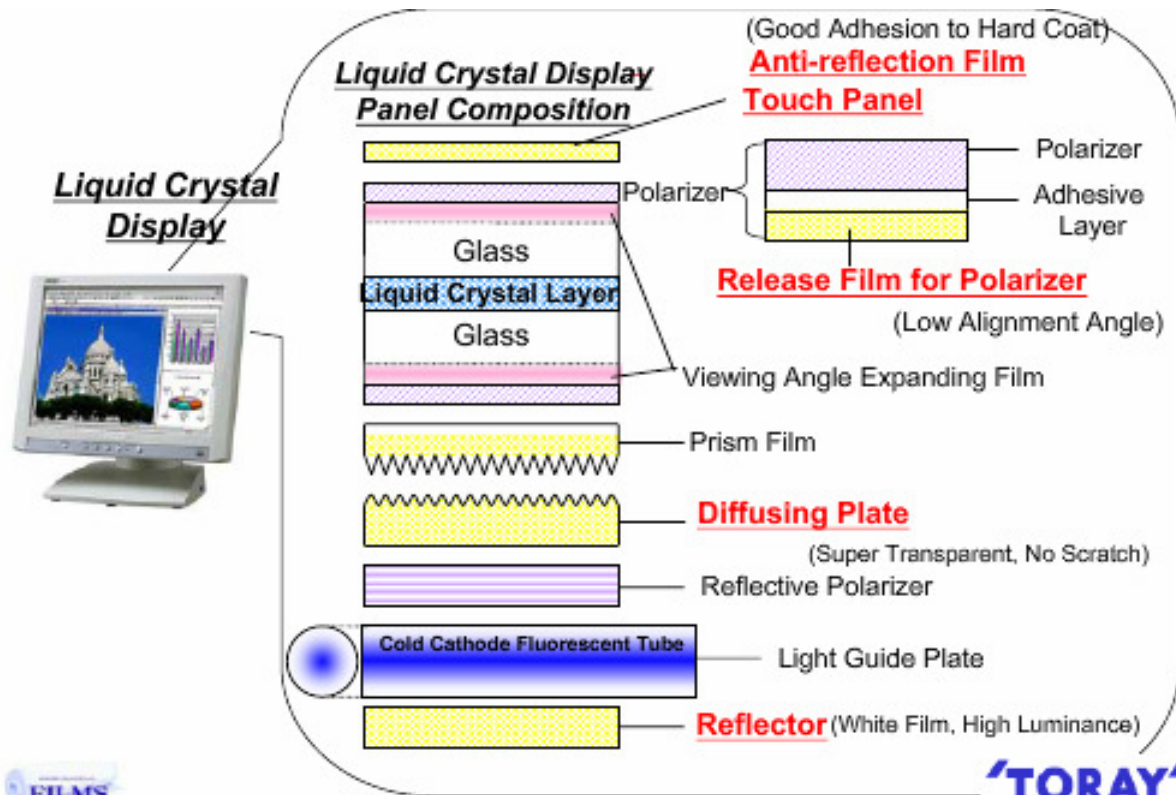
## 2) Expansion of Environmental Protection Products Market

Demand Increase of "Energy Conservation," "Extension of Product Life," "Environmental Safety," and "Waste Reduction"

# Динамика рынка по областям применения



# Развитие



# Toray's Film Products

<u>Brand</u>	<u>Features</u>	<u>Major Applications</u>
LUMIRROR (PET)	High Strength, Transparency, Chemical Resistance	General Industrial, Packaging, Magnetic, Capacitors
TORAYFAN (PP)	Lightness, High Tensile Strength, Electrical Properties, Mechanical Properties, Chemical Resistance, Moisture Resistance	General Industrial, Print Lamination, Packaging, Capacitors
TORELINA (PPS, <u>Polyphenylene Sulfide</u> )	High and Low Temperature Resistance, Non-flammability, Chemical Resistance, Hydrolysis Resistance, Creep Characteristics	Capacitor, Electric Insulation, Electronic Components
MICTRON (PA, <u>Para- Aramid</u> )	High Rigidity, Heat Resistance, Excellent Moisture-proof Property, Gas Barrier Property, Surface Smoothness	<u>Magnetic Recording Media</u>