

AWA

Alexander Watson Associates

Global Release Liner Industry Conference & Exhibition 2013

March 20-21, 2013 - Denver, CO, USA
Grand Hyatt Denver Hotel

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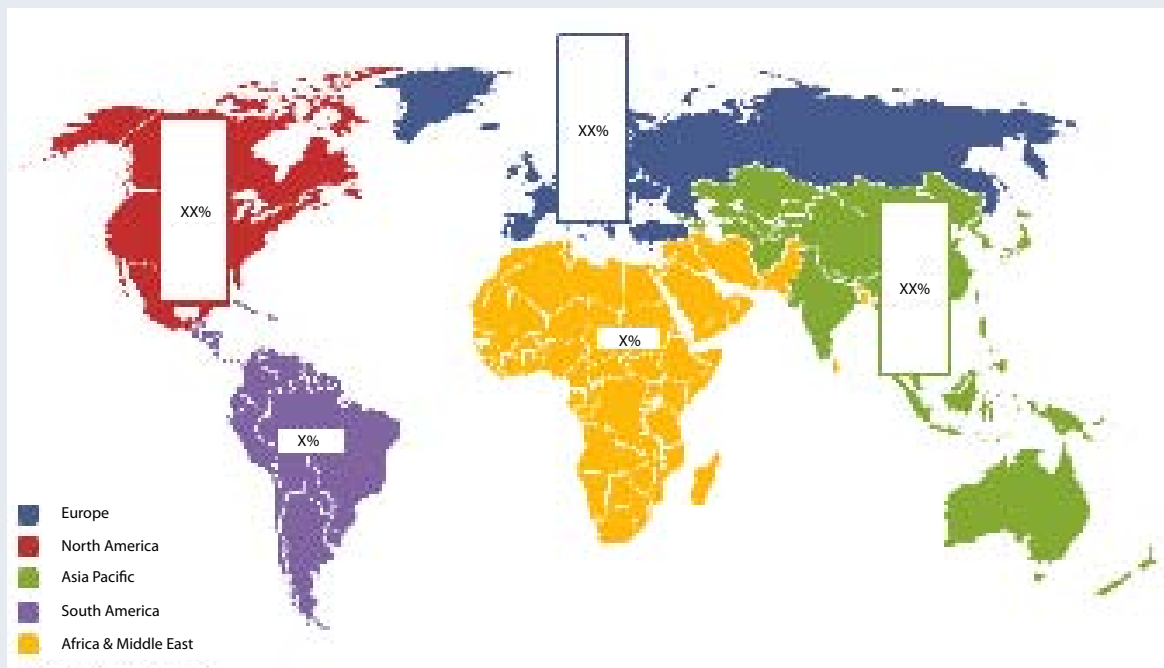
Conference Outline

*Corey Reardon, President & CEO, AWA Alexander Watson Associates
introduces this key industry event, the core annual meeting for the
release liner industry worldwide*

Annually, this unique industry platform, alternating between Europe and North America, brings together key industry players to network, educate, discuss, debate and share valuable information on the market, current issues, opportunities, and developments in the ever-changing and challenging release liner industry worldwide.

AWA Conferences & Events has organized the 2013 Global Release Liner Industry Conference & Exhibition, to be held in Denver Colorado, USA. This annual event has become the key meeting place for all involved with the release liner industry, as supplier, producer or user.

The release liner market has showed slow, but steady recovery in the last year, as the global economic environment continues to be uncertain. The near future continues to be uncertain, driven by economic and financial sector turmoil in Europe; a slow but tentative economic recovery in North America continued but softening growth in Asia and growth in South America but from relatively low volume levels today. Growth worldwide in 2012 is between 1.5% and 8% depending on the region and application segment, with the Asia Pacific and South American markets exhibiting the highest growth opportunities and therefore predicted to gain a larger share in the overall market.



The 2013 Global Release Liner Industry Conference & Exhibition will provide, through expert presentations, panel discussions, and AWA exclusive market data, a complete overview of the current market environment, growth prospects, industry developments, and technology trends.

The comprehensive program will include market information and AWA's annual industry survey, along with other expert presentations highlighting the key issues across the value chain, market opportunities, and business development prospects, including highlights of geographic growth worldwide. A panel discussion, which has become a feature of the conference annually, will focus on silicone and release coating technology, providing a forum for expert discussion and debate on technology and coating trends. A focus is being placed on end user presentations to highlight application needs and trends in the market, particularly in growth areas.

The Exhibition running concurrently with the conference program will allow the presentation of key companies' expertise and facilitate networking.

This year's conference will feature two concurrent workshop sessions:

1. Business Development and Growth Opportunities
2. Is Liner Recycling an Obstacle or an Opportunity?

The conference will be complemented by the concurrent exhibition and an extensive networking program including lunches and cocktail reception.

The AWA Conferences & Events team looks forward to welcoming you to the Global Release Liner Industry Conference & Exhibition 2013 in Denver, Colorado.

Conference Exhibition

The Global Release Liner Industry Conference & Exhibition annually attracts many industry decision makers from top-management levels. During the conference they spent a good proportion of their time in the exhibition area, which presents a unique opportunity for your organization to present itself and its products and services. The exhibition will run for a day and a half during the conference.

Take advantage of this opportunity and become an exhibitor.

Exhibitor benefits

- Access to a global industry audience
- Creating awareness and company profiling
- Complimentary conference attendance
- Corporate logo included on the floor plan
- Valuable industry exposure and brand recognition pre-, post- and during the conference

Exhibition package includes

- One complimentary conference attendance
- Corporate logo included on the exhibition floor plan
- One emailing to conference participants announcing all participating exhibitors
- A skirted, 6 ft display table (if required) or equal display space
- Day-to-day assistance with your preparations
- Valuable industry exposure, pre-, post- and during the conference
- Post-conference access to participant information

Exhibition package fee US \$2.495,-

For additional information or sponsorship opportunities, including the exhibition package, contact Arie Looije at a.looije@awa-bv.com or call +31 20 676 2069



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For updates on the conference #GRLICE and for the industry #releaseliner

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Conference Program

Tuesday, March 19th, 2013

6.00 – 8.00pm Welcome Drink Conference & Exhibition Registration

You could meet us for a first drink in the Maroon Peak Room on the second floor of the hotel.
Pre-registration is also possible.

Wednesday, March 20th, 2013

8.00am Opening Conference Exhibition

8.00 – 9.00 Conference Registration & Welcome Coffee

Concurrent Workshop Sessions

9.00 – 12.00 **Session A: Is Liner Recycling an Obstacle or an Opportunity?**

Workshop leader: Calvin Frost, CEO, Channeled Resources Group

The purpose of the workshop is to bring industry leaders together in an informal venue to develop solutions for liner recycling – particularly in pressure sensitive roll labeling – that are economically viable and represent opportunities to the entire value chain. We are really focused on the liner that is generated in “roll label”, This represents the largest volume and, curiously, the biggest opportunity for those that can see through the forest of roadblocks and objections.

9.00 – 12.00 **Session B: Business Development & Growth Opportunities**

Workshop leader: Jackie Marolda, Vice President & Senior Consultant, AWA Alexander Watson Associates & Sarah Rigby, Consultant, AWA Alexander Watson Associates

This hands-on workshop will give insights in ways to ensure successful business development assessment and analysis for your business. We will look into the characteristics of growth-oriented companies and effective and efficient opportunity assessment and analysis introduce several tools: AWA's Ten Key Questions to quickly assess ideas and opportunities for further resourcing; Hands-on application: ideation, data knowledge, prioritization, research requirements and resourcing, and Six Key Measures to ensure a 360° Analysis.

12.00 – 1.00pm Lunch

Market & Business Session

1.00 **Conference Opening & Introduction**

Corey Reardon, President & CEO, AWA Alexander Watson Associates

1.00 – 1.30 **Global Release Liner Market Overview**

Corey Reardon, President & CEO, AWA Alexander Watson Associates

This presentation provides up-to date, concise, and accessible quick scans of growth, developments and trends of selected markets worldwide, providing material suppliers, silicone coaters and companies involved in the release liner market with a complete and global industry overview.

1.30 – 2.00 **Annual AWA Industry Survey**

Jackie Marolda, Vice President & Senior Consultant, AWA Alexander Watson Associates

This presentation will present an analysis of the thoughts of industry players on the state of the industry and market developments. The survey will highlight their thinking and expectations on key industry topics like Sustainability, Industry Cost & Profitability, Mergers & Acquisitions and Growth & Expectations.

2.00 – 2.30 **South East Asia – Emerging Market with Potential**

How to train your Dragon: Tales from Inside an Emerging Market

Wilco van Zwieten, Founding Shareholder, SAScoat Vietnam

This presentation will cover the forecasted growth for the next 5 years for liners and laminates in the Asia Pacific market. The increasing role of efficient and sometimes disruptive logistic solutions, giving liner and laminate producers a global playground in which to compete will be discussed, as well as Dragon and Tiger economies and ‘Packaging outside the box’ – an insight into the skills and techniques required to be successful in Asia as a company.

Conference Program

Wednesday, March 20th, 2013 (contd)

- 2.30 – 3.00 South America – Emerging Market with Potential**
Roberto Ribeiro, Manager, Asterisco Consultoria E Participações
The presentation will focus on the South American Market, looking at all application areas for release liner, and identifying opportunities and risks in investing in the region.
- 3.00 – 3.30 Asia – Emerging Market with Potential: Asia Pacific Market and Ramifications for North America**
John Smedley, Sales Director, North America UPM Specialty Papers
This presentation will discuss current trends in the Asia Pacific market and will also evaluate what they will mean to the North American market.

3.30 – 4.15 Coffee & Networking Break

Technology & Material Session

- 4.15 – 5.15 Silicone & Release Coating Panel Discussion**
An open discussion among key industry silicone suppliers and coaters on current and future issues such as developments, trends, challenges, sustainability and more. Incorporating a Q & A session with the delegates.
- James Casey – Vice President, Technology, FLEXcon Company
Sean Duffy – Global Business Manager - Silcolease Release Coatings, Bluestar Silicones
Sjaak Elmendorp, Vice President of Technology, Avery Dennison
Christian Velasquez – Global Market Director, Dow Corning
Moderator: Corey Reardon
- 5.15 – 5.45 Best Practices for Promoting Adhesion of Release Coatings**
Rory A. Wolf, Vice President Business Development, Technology Director, Atmospheric Plasma Systems, Enercon Industries Corporation
Continuous product and process developments for improving pre-impregnated material applications such as windmill blades, aerospace components, recreational products, automotive components and ballistics protection equipment have driven the need for greater adhesion between release coatings and roll-to-roll paper/film-based substrates. This work provides evidence of new surface modification techniques which improve bond strength of liquid silicones to substrates. The issue of backside treatment and its avoidance will also be addressed.
- 5.45 – 6.15 Using Renewable Nanotechnology to Improve Release Base Paper Performance**
Robert Hamilton, President, Stirling Consulting
In pilot trial work at the University of Maine Process Development Center, the use of novel nano-fibrillated cellulose technology has demonstrated the ability to improve holdout, formation and surface uniformity of base papers. At the same time, machine operation and efficiency improvements have been noted, related to reduction in energy savings resulting from reduced refining requirements.
- 6.15 – 6.30 Closing Remarks**
- 6.30 – 8.00 Cocktail Reception, Networking & Conference Exhibition**
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Conference Program

Thursday, March 21st, 2013

7.00am – 8.00 Exhibition Opening, Coffee & Networking

8.00 Conference Opening & Welcome
Corey Reardon, President & CEO, AWA Alexander Watson Associates

Keynote Presentation

8.00 – 8.30 Global Forest, Paper & Packaging Industry Survey 2012 Edition – Survey of 2011 Results
Ian Murdoch, Director Global Forest, Paper & Packaging – Austria, PricewaterhouseCoopers
This presentation will review the forthcoming Annual Global Survey of the Top 100 players in the Forest Paper & Packaging (FPP) Industry, which covers 2011 performance – globally and by region. It will also discuss the quarterly earnings summaries for 2012 and give some interesting insights about the future from the 50 or so FPP CEOs interviewed as part of the wider-ranging Annual CEO Survey.

Application & End Use Session

8.30 – 9.00 Building & Construction Release Liner Market: Applications, Trends, and Challenges - A Manufacturers Perspective

Bob Johnson, Global Business Development Director, Huhtamaki Films, Inc

Changes in building codes, a desire for more energy-efficient systems, and the continued desire for more cost-effective solutions in both raw materials and application time are driving the building and construction industry to continually evolve their product offerings, while developing systems that guarantee longer life of the structure. Huhtamaki Films will show how these challenges also affect the manufacturers of the release films used in these systems and how this drives new applications in the release film industry.

9.00 – 9.30 Industrial Market: Release Liner Applications for Insulation in Appliance Applications

Melissa Nealon, Sr Sourcing Professional, Owens Corning

Soltech, acquired by Owens Corning uses release liner to complete its product during its processing after applying adhesive for insulation in white goods. This presentation outlines products and illustrates where and how the liner is used. The presentation will illustrate the importance of the liner in the final stage of processing and what is expected from the liner, suppliers, and overall product performance. Future expectations and trends for liners and the development of application where liner is used will be discussed.

9.30 – 10.15 Coffee & Networking Break

10.15 – 10.45 Graphic Tape Market: Application tapes, Challenges in use of Premasks for Plotter cut and Printed Graphics

Darryl Liedel, Manager Product Development and Quality Assurance, RTape Corp

This presentation will address the use of premasking tapes that are used with plotter cut and printed vinyl in the graphics market. The discussion will include the dominate liners used in the market and the challenges presented by various types for masking and end use application.

10.45 – 11.15 Product Identification Market: Release Liner Trends in the Film Label Industry

Ron Ducharme, Product Manager, Product Identification Business Team, FLEXcon Company

Converters are increasingly feeling the pressure from end users who want greener options to lower their carbon footprint. In order to meet these market needs, converters are in search of new ways to offer greener alternatives that also allow them to maintain or even improve their net margin. In light of this growing trend, Ron Ducharme will lead a discussion on the current release liner trends in the film industry. This session will delve into the types of available liners, the differences between film and paper release liners, and what to consider when choosing a film, paper or hybrid release liner. As the industry moves toward thinner-gauged liners, attendees will learn the challenges of new liner technologies and how to overcome them, as well as the benefits of using liners made partially from post-consumer waste.

11.15 – 11.45 Medical Market: Release Liner Converting – Custom Device Manufacturing

Luther Urie, West Coast Business Development Manager, Innovize

Ron Romain, Senior Development Engineer, Innovize

This presentation will address designing liners as functional features in disposable products such as a delivery systems, tabs, assisting in automation for sub-assemblies, etc. and will look at using release liners from a web converting perspective. The presentation will close with a review of new developments, trends and problems as they relate to release liners and custom converting them.

11.45 – 12.00 Conference Close

12.00 – 1.00pm Exhibition & Networking

Venue

Grand Hyatt Denver
1750 Welton Street
Denver, CO 80202-3999
United States
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Fax: +1 (303) 603-4074

Hotel

Hotel accommodation is **not** included in the conference registration fee and is the responsibility of individual participants. The Grand Hyatt Denver offers a special room rate to conference participants for bookings made latest by February 19, 2013 (availability on a first-come, first-served basis).

Please make reservations by calling the hotel's Reservations Department at (+1) 847 518 1234 or (+1) 800 233 1234, and mention the conference to apply for the special rate.

Special Room Rate / Available until February 19, 2013
Single / Double Occupancy USD 149
Exclusive of applicable state and local taxes

Registration Form

Global Release Liner Industry Conference & Exhibition 2013

March 20-21, Denver, CO, USA

Mail or Fax to:

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Terms & Conditions

Conference Fee

The registration fee includes conference attendance, lunch, coffee breaks, cocktail reception and online conference proceedings. Registrations may be limited and will be accepted on a first-come, first-served basis.

Payment

The conference fee must be paid to confirm registration. To pay by bank transfer, please use the bank information provided below. AMEX, Eurocard/MasterCard and VISA are accepted. Make checks payable to AWA Conferences & Events.

Cancellation Policy

Submit a cancellation in writing or by fax to AWA Conferences. You may cancel your registration for a 75% refund from the date of registration until 30 working days prior to the conference. Cancellations received between 29 and 0 working days prior to the conference will not receive a refund. If you can not attend, you may designate an alternative attendee from your company by contacting AWA Conferences. Registrants who fail to attend or cancel between the 29 and 0 working days prior to the conference are liable for the entire fee. No warranties for changes are expressed or implied. AWA Conferences reserves the right to cancel an event and commits to inform the registrant no later than 29 working days prior to the event. In this case only the registration fee will be refunded.

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Concurrent Sessions, March 20th: I wish to attend:
☐ Session A: Is Liner Recycling an Obstacle or an Opportunity?
☐ Session B: Business Development & Growth Opportunities
- ☐ Please register me for the conference at the special group registration fee \$ 895
(applicable when registering 3 or more paying company delegates)
- ☐ I wish to participate as an exhibitor, I hereby order the exhibition package \$ 2495
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- ☐ Unable to attend, please send me the conference proceedings at \$ 700

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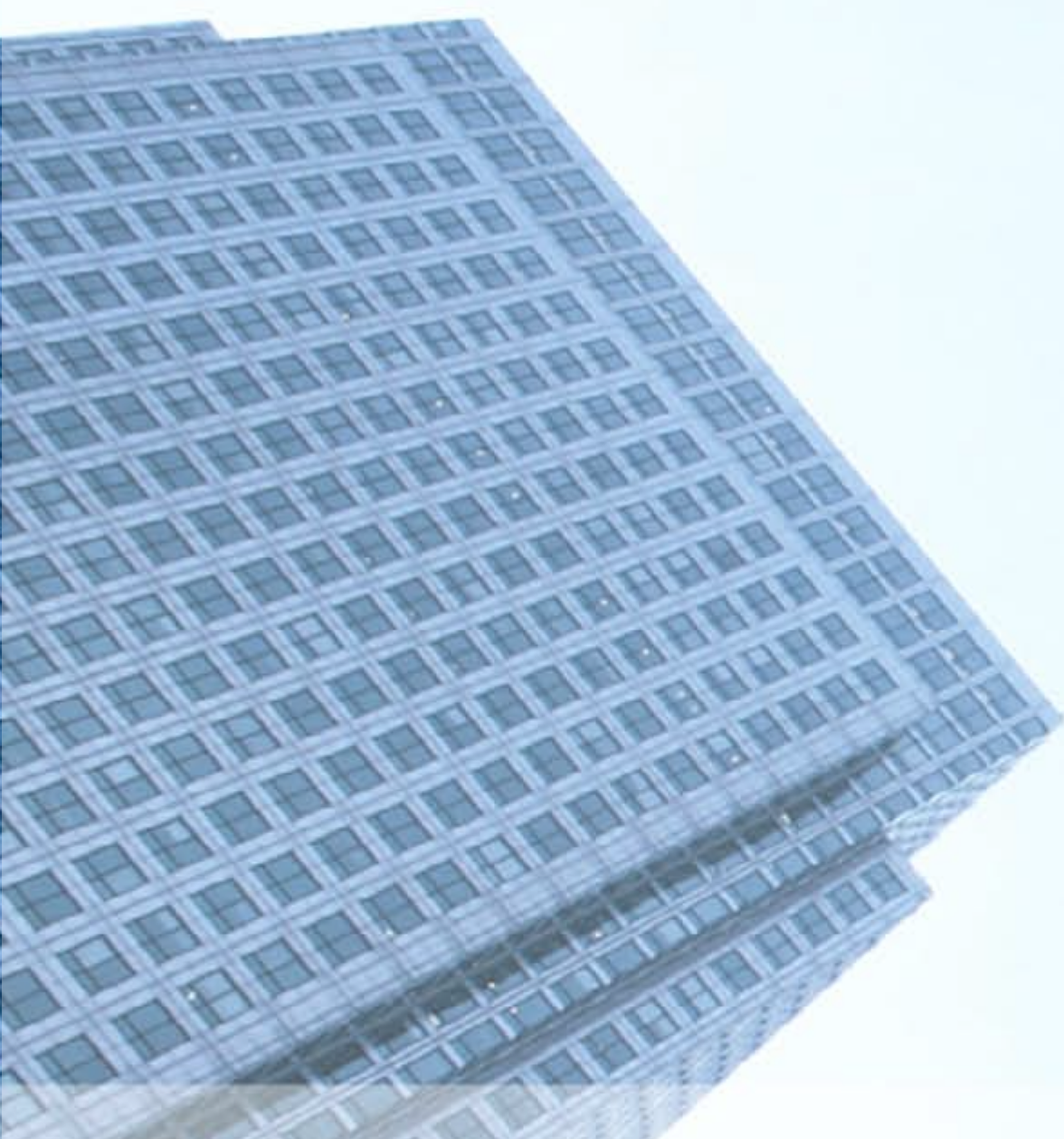
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