Letter from the Managing Director:

Dear Industry Colleagues,

Welcome to this year’s first edition of the MEDIA-TECH Association’s E*news, with updates on the industry, the Association, and the events coming up this year. Regarding the market, this promises to be an interesting year for the industry, with predictions that 2008 will see a resolution of the format war. In addition, DEG has also posted some positive figures about the optical media industry, which is cheering.

Naturally there has been a lot of discussion about the Warner announcement, and this newsletter has highlights from some of the analysis that followed on from the studio’s move to BD.

Late last year, Oerlikon launched their BD50 replication line, and Singulus is shortly to unveil their own dual layer BD line, providing impetus to the worldwide BD production capacity. I am delighted to be able to report that we have now sold all of the display space for our Conference and Showcase in Miami. More information on that and on the Expo in Frankfurt is in this edition of the E*news.

Yours truly,

Bryan Ekus
Managing Director
MEDIA-TECH Association

SINGULUS acquires OERLIKON's Blu-ray Activities

SINGULUS TECHNOLOGIES AG signed a contract with Oerlikon Balzers AG, on January 31 for the acquisition of Blu-ray disc equipment operations. With this strategic acquisition SINGULUS takes over the entire Blu-ray activities as well as the servicing of the Blu-ray disc production lines already delivered by OERLIKON so far. OERLIKON has in addition announced that it will discontinue its CD and DVD production line operations. This will further strengthen SINGULUS’ market lead in this segment.

The Blu-ray format has definitively established itself as the new standard in the market. High-definition television, HDTV (HD Ready and Full HD), combined with the Blu-ray video format, is the new technology of the media sector.

“With the strategic acquisition of the Blu-ray disc equipment operations from OERLIKON we are improving our good position for Blu-ray still further. The decision of the major US film studios in favor of the Blu ray format as the future video standard will result in increasing demand for our machines over the next couple of years. SINGULUS will substantially benefit from this trend,” commented Stefan A. Baustert, CEO of the SINGULUS TECHNOLOGIES AG.

Besides the production machines SINGULUS will acquire all important optical disc patents and licenses as well as OERLION’s customer base.

It becomes more and more clear that “Hollywood” is opting for Blu-ray. According to a study performed by the research company Understanding & Solutions the production of Blu-ray discs will almost triple in 2008 compared with 2007. Other institutes expect even higher growth rates. Warner’s decision to change over to the Blu-ray camp announced during the CES fair in Las Vegas has a massive impact on the sector. Many other studios have switched in the meantime as well. Latest market figures confirm this trend. According to Gamestar Online and the US market research company National Purchasing Diary, sales of Blu-ray players and game consoles in the US dominate the market for the 3rd format generation with a market share of 92.53 %.

SINGULUS has upgraded its Blu-ray disc equipment in preparation for the production of the 50 gigabyte dual layer Blu-ray disc. Stefan A Baustert, Chief Executive Officer of SINGULUS, added: “We firmly believe that the global market penetration of the Blu-ray disc will kick off in 2008. SINGULUS consequently expects significant growth for the Blu-ray activities in the 2008 financial year.”
Luck is not an option

It takes strength, ambition and foresight to carve out your position in the optical media market. Whether you work with pre-mastered or recordable media, the competition is too intense and the potential pitfalls too great to leave any part of your business plan to chance.

AudioDev understands this. Protecting your quality reputation is the reason we’re always at the forefront of new media development, as both an independent authority and provider of precision testing systems and support.

A single-source supplier, we make sure you meet your QA targets, supporting your productivity and profitability goals.

Today’s increasingly sophisticated consumer is ready to invest in high-definition blue laser media. The potential reward is great. Can you deliver?

Contact AudioDev. We tailor complete solutions that protect your reputation and your bottom line.
### Day 1: March 4, 2008, Registration 8.00 am, Start of Conference 9.00 am

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<td>09.40 am</td>
<td>Pat Wilkison, STEC's, Vice President of Marketing and Business Development</td>
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<td>Mike Mitchell, Sony DADC, GB Dual Layer Blu-ray Production</td>
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<td>Bernard Kirschner, CD-ROM Services Australia, Duplicating onto ‘Flash’ Memory and New Media</td>
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<td>Association Panel TBA, Bruce Nazarian, DVDA, Cost Effective Optical Disc Production and Delivery</td>
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<td>Stephan Hotz, Singulus Technologies, Fascination Blu: Replication &amp; Mastering</td>
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<td>Brian Wink, Com. Capital Finance Group, President, Leasing, What is the Advantage</td>
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<td>Marianne Sernev, AudioDev, Vice President Sales and Marketing, Protecting Content on Optical Disc (X-Protect, QFlix, Macrovision, others...)</td>
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<td>09.00 am</td>
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<td>Ron Tovella, Centrosolar, USA, Presentation about the Solar Market</td>
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<td>10.00 am</td>
<td>Michael Gutowski, Infodisc Technology, Managing Director, BD Challenge in Europe</td>
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<tr>
<td>10.50 am</td>
<td>BDA, Strategy for BD/HD Content, Advancements in Optical Disc Decorating – Where we have come from and where we are going</td>
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<td>11.20 am</td>
<td>Steve Gilbertson, North America, for Kammann Machines, President</td>
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<td>Cornelius Sawatzky, Xiris, Sales Manager, Inspecting for High Definition Formats</td>
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<td>Ilsemann TBA</td>
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<tr>
<td>02.00 pm</td>
<td>AWM, Molding Technologies for Blu-ray Disc™</td>
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<tr>
<td>03.00 pm</td>
<td>Rec. Products of America</td>
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<tr>
<td>03.20 pm</td>
<td>Presentation DVDA, Authoring Considerations for Next Generation Discs (Best Practices for Successful Delivery)</td>
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<tr>
<td>03.40 pm</td>
<td>Presentation AIMMA, Mail Marketing: New Mailer Options that can save your Customers Money in the Face of Increased Postage Costs</td>
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<tr>
<td>04.00 pm</td>
<td>IDDA Panel</td>
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<tr>
<td>04.20 pm</td>
<td>End of Conference</td>
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Are You ready for Blu-ray?

"A new and exciting disc format shines on the horizon. Blue lasers are being used to read and write the extended storage capacity of these discs. Blu-ray and other high-definition become the new standard to show us the finest details of our pictures and movies. New disc formats require new production tools in order to meet the new technical challenges. Axxicon's X-technology offers you the solutions to meet these demands. We enable you to make tomorrow's discs already today. Our new X-technology moulds are ready for the new high-definition standards. Included with our moulds is the dedicated process support and a distinguishing after sales support to make it happen for you."

KNOW-HOW TO PERFORM

Axxicon has a proven track record in delivering state-of-the-art moulds for world-class optical disc production. Our innovations are the key for your successful production results. Just one example is our patented mould guiding system. By ensuring constantly high centering accuracy, it guarantees the lowest possible ECC values. You'll also benefit from a unique thermal concept for maximum reliability, plus high durability and a low maintenance frequency. We'll be glad to tell you more about our latest innovations. Just contact us for the proof!

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Presentations of AIMMA and IDDA at the MEDIA-TECH Conference

Mail Marketing: New Mailer Options that can save your Customers Money in the Face of Increased Postage Costs

A review of the recent postal rate increases and changes to the media and standard mail categories, and how they affect how your customers mail CDs and DVDs. Presented by a representative of a leading mail/fulfillment house currently working with replicators and duplicators, this session will offer suggestions and ideas that you can use to help your customers achieve more efficient and cost effective disc mailings under the new constraints.

Flash memory

This is a product that disc duplicators must be involved in. Pre-recorded Flash memory is going to be big, not only for cell phones, navigation systems, gaming consoles, audio, marketing material, just as discs have been. Thomas Blaha from North Coast Interactive the Altec automatic copy stations can do thousands in a day, and Bernhard Kirschner of CD-ROM Services Australia will show attendees who will be able to buy the X-Card software and instructions for a simple build it yourself starter system at a special price. Aleratec should be introducing their new low cost Flash duplicator, using the X-Card software. We will also expect to be showing new software that allows you to write protect part or all of the data, autorun the Flash memory, even use up to an 8 GB Flash as a protected dongle with all necessary software on board.

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SINGULUS will Present its new Blu-Ray Dual Layer Production Machine

February 27. - 28. 2008

SINGULUS TECHNOLOGIES, the global market leader in the optical disc market, announces the launch of its newly designed production system for 50 Gbyte Dual Layer Blu-ray Discs: the BLULINE II. SINGULUS will be inviting customers and partners of the company from around the globe to a demonstration of the new SINGULUS machine and a seminar featuring high-profile international experts. During the two-day seminar, representatives of the SINGULUS Management will inform the attendees in detail about SINGULUS’ future strategy; this will be followed by a presentation on mastering and replication technology for Blu-ray Discs. In addition, international experts will present papers on the Blu-ray Disc market and HDTV. Sony and the Blu-ray Association will demonstrate the advantages of this new format. During the event at Kahl, the new BLULINE II will produce playable Dual Layer Blu-ray Discs with content. SINGULUS teamed up with Sony DADC, Salzburg, in developing the production technology for mass production of Dual Layer Blu-ray Discs with a storage capacity of 50 GB. Sony DADC provided SINGULUS with the necessary production expertise. The launch of the new BLULINE II means that disc producers will be able to build up sufficient capacity for the production of the new disc generation. Thanks to the high storage capacity of Dual Layer Blu-ray (50 GB), SINGULUS is convinced that Blu-ray will prevail in the market.
NME and VDL ODMS Showcase first HD VMD Line

Several MEDIA-TECH Association members came together recently in The Netherlands for the unveiling of the world’s first commercial multi-layer HD VMD replication line. In addition to technology demonstrations and exhibits of HD VMD products and services, guests were also given an exclusive tour of the new line at VDL-ODMS. The system, which uses P2P technology, was running during the tour, and manufacturing triple layer discs. “By creating the HD VMD production solution, we have once again demonstrated our engineering and mechanization capabilities in the area of optical discs,” said VDL-ODMS Product Manager Geffroy Huiskens. “We consider HD VMD the only true alternative to Blu-ray based on red laser and really see a prosperous future for this emerging format.”

Sanjay Khar, director of NME and Head of the Optics Division, told guests, “This revolutionary new technology is the consummation of the brilliant ideas from our scientific team and the practical expertise of our industry partners. In the end, what we have achieved is an affordable and stable solution with lots of proven process modules for our partners and customers.”

Alexander Bolker-Hagerty, Executive Vice President, Business Development, provided worldwide updates of recent milestones, and the day also included presentations from some of the format’s technology partners, including DaTARIUS, Netstal, and Scanavo. Many other key industry players were also present, including names such as AWM, Dr. Schenk, Plasmon, Sony, and Targray.
By choosing the right partners, with AWM and its »six.one« mould among them, I achieved my goal of becoming the first independent replicator to produce Blu-ray Discs certified and approved by Sony DADC and the official BDA Testing center.

New spin coating processes, advanced production materials and complex wet embossing technologies, had made it difficult to see how replicators could reach the goal of producing good Blu-ray Discs.

But now it’s clear that AWM’s advanced molding technologies will definitely be able to help you achieve the goal of making both Blu-ray Disc™ single layer (SL) and Blu-ray Disc™ double layer (DL) in good quality. AWM’s patented Tempered Venting Ring (TVR) and patented Homogenous Tempering Technology (HTT) make the perfect substrate for such a demanding application.

AWM »six.one«. No compromise.
Sony DADC more than Doubling its Blu-ray Disc Capacity

In the course of 2008, Sony DADC will expand its Blu-ray Disc (BD) production and achieve a yearly production capacity of 200m units worldwide. For its Austrian sites, Sony DADC will be recruiting at least 100 additional employees. The investments are fuelled by Warner Bros. Entertainment’s decision to release High Definition movies exclusively in the Blu-ray Disc format.

“US and European consumers have chosen decisively for Blu-ray as the High-Def format when doing their Christmas shopping. Blu-ray’s revenue was at least twice as high as that of the competitive format, for both players and storage media. Warner’s announcement is a logical reaction to this consumer choice” explains Dieter Daum, Chief Executive Officer at Sony DADC.

Over 110 million Blu-ray Discs produced at Sony DADC

Since April 2006, Sony DADC has already produced more than 110m Blu-ray Discs worldwide, of which more than 20m are BD50 (50 gigabyte Blu-ray Discs). In Salzburg alone, over 40m BDs have been produced.

Double capacity and more than 100 new employees

“In response to this strong demand, we are expanding both our Salzburg facilities - Anif and Thalgau - within the coming months. Our team will be expanded by 100 highly qualified and motivated people” Dieter Daum says. “In 2008, Sony DADC will be doubling its BD capacity, achieving a yearly production capacity of 200m units worldwide.”

Blu-ray taking lead in High-Definition market

Chris Reiser on the overall Blu-ray market situation: “In Europe, there are more than 300 Blu-ray movie titles currently available to consumers and more than 50 releases are planned within the next quarter. Not only major movie studios, but also a growing number of Independent publishers opts for Blu-ray as the High-Def standard. Warner’s decision means that 70 per cent of movies will be released exclusively on Blu-ray.

More and more disc replicators equipping their facilities for BD production

A growing number of companies is coming on line with Blu-ray Disc production. To assist, Sony DADC has been providing BD50 process know-how to line manufacturers, including Oerlikon (Switzerland) and Singulus (Germany). Hans Ebinger, Head of Optical Disc at Oerlikon on the strategic cooperation: “The current market development confirms our Oerlikon Optical Disc strategy. We have focused on Blu-ray as the next generation format from the beginning. The excellent cooperation with Sony DADC regarding the BD50 wet embossing process allowed Oerlikon already to ship the first BD50 lines to key customers in December 2007.” Stefan A. Baustert, CEO of Singulus Technologies AG is very optimistic for Blu-ray replication line orders in 2008 and the following years. “We are convinced that this technology will be the prevailing third generation format and hope that finally all studios will choose this format to settle consumers’ uncertainty regarding High-Definition content” Baustert says.

Sony DADC not only cooperates with line manufacturers, but also with disc replicators wanting to get started with BD production. One of those is French-based QOL, who was among the first companies in Europe investing in a Blu-ray Disc line in partnership with Singulus Technologies. QOL’s President Laurent Villaume commenting on the cooperation: “During the development of this partnership, QOL established a focussed and constructive relationship with all the teams of Sony DADC. Today, more than a competitor, Sony DADC became a real partner.”
**DVD Star KVD-30**

DVD Packaging Machine

The DVD Star KVD-30 is a small and ergonomic Packaging Machine for different DVD-Soft-Boxes. It is flexible enough to pack different single and double Soft-Box styles with a minimum changeover time. Order changes can partly be prepared while the machine is running. This machine is designed for user-friendly operation, at the optimal working height. The framework construction insures stability and endurance. Its sleek ergonomic design coupled with its flexible capability is the mark of a real winner.

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**Carton Star Cpac-20**

Sideloader

Our cartoner Cpac-20 is designed for cartoning DVD/CD boxes and other products. The products can be inserted single file or stacked into either O-Cards (both sides open), Multi-Pack boxes (one side open) or cartons (both sides closed).

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High Definition Disc Format Update

With Warner Bros.’ pre-CES announcement that its high-definition DVD titles are to be released exclusively on Blu-ray, the industry moves even closer to resolution in the high definition disc format war. ‘Though player prices have started to fall across the board, there’s been growing concern that the consumer does not fully understand the high definition concept,” says Jim Bottoms, Co-Managing Director at Understanding & Solutions, ‘and the confusion has been further compounded by the availability of two different disc-based formats. ‘Warner Bros.’ decision to shift from its dual-format position has brought much-needed clarity to the market and strengthens Blu-ray’s hand considerably. Looking ahead, the next six months will be critical for the future of high definition discs. There’s significant market potential for a packaged format and with 75% of Hollywood studio disc releases exclusively behind Blu-ray from the end of May 2008, the confusion may soon be over.”

A recent market report from Understanding & Solutions pegs household penetration of High Definition players at 36% in the US by 2011 and at 11% in Western Europe within the same timescale. When game consoles and PC drives are considered - both of which will add considerably to the total installed base - the new generation of optical discs is going to develop strong traction within the marketplace. Looking back to Q4 2007, many price reductions were seen on high definition hardware, the most spectacular being the US$98 campaign on HD DVD players which resulted in sales of 90,000 units over the space of a few days in November, whilst BD player prices dropped below US$300 for the first time.
With 75% of Hollywood studio support exclusively Blu-ray, consumer buy-in will continue to move in that direction, as increased title availability from the Blu-ray camp will ensure retailers devote ever more shelf space to this format.

The pressure on those studios remaining in the HD DVD camp has intensified considerably, and further moves to abandon HD DVD are expected during the coming months. Although the format war is not yet over, the end is in sight, with Understanding & Solutions predicting a total withdrawal of support for the HD DVD format by most key retail groups by Q4 2009 at the very latest.

The end to the format war and the adoption of a single format with industry-wide support will provide much-needed momentum to the High Definition Video sector. The industry will be able to focus on consumer awareness and education, thus negating much of the confusion that currently exists. Confusion not only surrounds the presence of two competing formats, but also the differences between High Definition, standard definition and upscaled standard definition pictures. Moving forward, consumers will become confident enough to begin widespread investment in High Definition Video, positioning the technology firmly within the mainstream.
MEDIA-TECH Expo 2008 in Frankfurt – The only Place this Year for High Definition Optical Disc equipment

MEDIA-TECH Association members are planning a high-def line-up of hardware products for May’s Expo in Frankfurt. Among this line-up will be replication lines for 50 GB Blu-ray discs along with the test equipment necessary for the higher definition media.

The largest international trade event for optical discs, the MEDIA TECH Expo, will once again take place in Frankfurt from May 6 to 8, 2008, in Hall 5.0 of the Frankfurt Exhibition Centre. A major highlight of the show will be the unveiling of several hardware solutions for 3rd generation optical disc production, including those for 50 GB dual layer Blu-ray Discs, which will be running live on the show floor.

This is the only major global trade event this year that will provide visitors with the opportunity to see these systems in action.

Live machine demonstrations, including:
- Content Production
- Authoring
- Formatting
- Mastering
- Stamper Production
- Disc Production: Moulding/Replication/Inline Testing
- Offline Testing
- Printing
- Packaging

Focusing on emerging trends and challenges in media manufacturing by concentrating on current optical disc formats as well as future growth, MEDIA-TECH Expo is the place for exhibitors and visitors to learn about synergies, efficiency, and productivity for their businesses. It promises to identify ways to benefit from the current business of CD and DVD and also how to profit from the emerging formats – HD DVD and Blu-ray Disc.
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Initial Product Offerings
OE-A Presented New Roadmap for Organic Electronics

Organic Electronics is entering the market with its initial product offerings. The second version of the Organic Electronics Association (OE-A) roadmap provides a forecast for the market entry of printed electronics through 2015 and beyond. Seven applications ranging from sensors over radio frequency tags to photovoltaics are covered in this publication. Additionally, manufacturing technologies and materials – along with their corresponding technical barriers (red brick walls) – are also identified and assessed.

Organic electronics is a platform technology that enables multiple applications that vary widely in terms of product specifications. Since the technology is still in its early stage – and is in the transition from lab-scale and prototype activities to production and commercialization – it is important to develop a common opinion about what kind of products, processes and materials will be available and when. The OE-A roadmap attempts to do just that. The OE-A roadmap is a key activity of the Organic Electronics Association – the international key industry association for organic and printed electronics – and represents the common perspectives of the OE-A members.

“This second edition of the roadmap the OE-A helps the industry, government agencies and scientists plan and align their R&D activities and product plans. We will frequently update and expand the roadmap with the international experts along the value chain,” says Wolfgang Mildner, chairman of the OE-A.

Organic Electronics Overview
Organic electronics is based on the combination of new materials – organic and inorganic – and cost-effective, large area production processes that open up new fields of application. They are thin, light-weight, flexible and environmentally friendly. Organic electronics also enable a wide range of electrical components that can be produced and directly integrated in low cost reel-to-reel processes. Intelligent packaging, low cost RFID (radio-frequency identification) transponders, rollable displays, flexible solar cells, disposable diagnostic devices or games, and printed batteries are just a few examples of promising fields of application for organic and printed electronics.

A number of key applications have been chosen to demonstrate the needs from the application side, identify major challenges, cross checked with the possibilities of the technology and to forecast a time frame for the market entry in large volumes. Key results are summarized in the Figure that illustrates the expected market entry in large volumes for seven application fields.

First organic electronics products have already reached the market, including passive ID cards, flexible lithium polymer batteries and sensor devices. Additional products, such as displays with organic TFT backplanes, printed radio frequency tags, organic photovoltaic cells and printed memories, are likely to reach the market later this year or early in 2008. Within the next several years, it is expected that mass markets will be reached and that all the above mentioned applications will be available in large volumes.

Organic Electronics Association (OE-A)
www.oe-a.org
The first ODC Nimbus HD-DVD/Blu-ray Switch-able Mastering System has been in continuous daily production at Deluxe Digital Studios since January 2006 mastering both HD-DVD and Blu-ray product. Our second system has been installed at ODS in Germany and our third system was sold to an independent replicator in America in March, 2007.

The fusion of ODC’s High-Resolution Dye Polymer and DRAW (Direct Read After Write) technologies and Nimbus’ patented rotation and translation mechanical systems has resulted in the most robust, reliable and cost-effective “Next-Gen” mastering system on the market today. And now, AACS and ROM-Mark capable!

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WHY AIBO TECH?

We are the leading packaging solution and service level provider for Media/Entertainment industry for 13 years. We have manufacturing hub with 3 plants in China, to support the world wide business.

WHAT AIBO TECH VALUE ADD

✓ Commodity Level
  ● In-house manufacturing capability on all kinds plastic packaging products for Media & IT industries

✓ Supply Chain Management (SCM)
  ● In-house kitting & assembly lines
  ● Warehousing and distribution management

✓ Content Management

● Copyright/license management
  ● In-house R & D on packaging design
  ● The footprints in NA, EMEA, and Asia

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