



2024 STATE OF THE FLEXIBLE PACKAGING INDUSTRY STRATEGIC OVERVIEW SURVEY - CONVERTER

Introduction and Company Information

All of the information gathered is confidential and will be reported in aggregate. No data or information will be attributed to any one company.

Not all questions require a mandatory answer, but please answer all that you can to guarantee the best results.

If you get to a page where someone else in your company needs to enter data, please follow this process:

1.) Complete as much information as you can. Be sure to hit "Next" button at bottom of each page (that is what saves and registers your input). You may skip a page or questions, but be sure hit the "Next" button.

2.) Go back to the original email you received with the survey link (from todd@ptisglobal via surveymonkey.com) and forward that email to your co-worker who will continue filling out survey. DO NOT try to paste the survey link into an email from your own email system (the system will not save your answers if you do not use the original email for accessing the link).

3.) Please be sure to ensure your colleague alerts you once they have completed entering their data. They can navigate anywhere in the survey using the 'Prev' or 'Next' buttons at the bottom of each page.

4.) When you or a colleague have completed all questions your company is willing to answer and your survey is ready to be submitted, hit the 'Done' button on the final page.

Thank you for your participation.

1. Please add a **key contact** for any survey follow up.

Name

Company

Email Address

Phone Number

2. NET SALES

For flexible packaging products, please indicate your company's 2022 & 2023 **Net External Sales** (for the calendar or latest fiscal year) **in Millions of Dollars (to nearest tenth)**.

Example \$35,200,000 would be entered as 35.2):

Note: For U.S. Converters, report net sales for all U.S. facilities (including export sales) but not sales for non U.S. facilities. For International Converters, report sales for products sold in the U.S. only.

Net External Sales **2022**

Net External Sales **2023**

3. What are the number of employees in your organization (focused on flexible packaging). This total should include both salaried and hourly employees.

Employees **2022**

Employees **2023**

4. Please select the appropriate category for your company based on **annual sales in 2023**.
(Note: new values for the categories)

Note: Net sales for all U.S. facilities (including export sales) but not sales for non U.S. facilities.

- ☐ Small (<\$10 million)
- ☐ Medium (\$10 million - <\$150 million)
- ☐ Large (\$150 million - <\$1 billion)
- ☐ Very large (\geq \$1 Billion)

5. For flexible packaging products, please indicate **the increase or decrease in your company's volume output** for 2022 (versus 2021 levels) and 2023 (versus 2022 levels), expressed as a %. Please use a minus (-) sign for decrease (for the calendar or latest fiscal year).

Example: 3.2 or -1.2

Please utilize whatever measure of volume applies for your business to provide a composite estimate of the overall change in volume for flexible packaging products.

2022 vs. 2021 (percentage change)

2023 vs. 2022 (percentage change)

6. Please provide the change in production totals that your company saw in 2023 versus 2022, in **total MSI growth** and/or **pounds of growth** (expressed as a percentage and without the percent sign). (For example for 3.2%, use 3.2. For negative values, please use the '-' symbol.)

Production change for
2023 vs.

2022 (measured in
MSI)

Production change for
2023 vs.

2022 (measured in
pounds)

7. What was your **capacity utilization percentage** 2023 (based on 24 hours/day and 7 days/week) and how did that compare to the previous year?

	Percent Utilization	Compared to Previous Year
Capacity utilization percentage	<input type="text"/>	<input type="text"/>

8. Please indicate the **average days on hand for total inventory** for 2022 and 2023:

2022

2023



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Products and Formats

This page focuses on products and formats your company manufactures.

9. Indicate which of the following **Products/Formats** are manufactured and sold by your company including those Products/Formats sold and shipped as Rollstock. **Please estimate as a % of net sales for 2022 and 2023.**

Note: The sum should add up to 100.

	2022	2023
Rollstock - Primary product filling	<input type="text"/>	<input type="text"/>
Rollstock - secondary or sleeve packaging	<input type="text"/>	<input type="text"/>
Rollstock - bundling/ overwraps	<input type="text"/>	<input type="text"/>
Retail carry bags	<input type="text"/>	<input type="text"/>
Storage and Trash	<input type="text"/>	<input type="text"/>
Premade - lay flat - retort pouch	<input type="text"/>	<input type="text"/>
Premade - standup - retort pouch	<input type="text"/>	<input type="text"/>
Premade - lay flat - non retort pouch	<input type="text"/>	<input type="text"/>
Premade - standup - non retort pouch	<input type="text"/>	<input type="text"/>
Shrink bags	<input type="text"/>	<input type="text"/>
Labels - die cut	<input type="text"/>	<input type="text"/>
Lidding - die cut and pre cut	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

Other (please specify)

10. For the Rollstock products provided in the previous question, please indicate your best estimate of how your roll stock use is broken down into final **Products/Formats/Packaging applications (in percent of net sales) for 2022 and 2023.**

Total should equal 100.

	2022	2023
Bag & pouches - lay flat - retort	<input type="text"/>	<input type="text"/>
Bag & pouches - standup- retort	<input type="text"/>	<input type="text"/>
Bag & pouches - lay flat - non retort	<input type="text"/>	<input type="text"/>
Bag & pouches - standup - non retort	<input type="text"/>	<input type="text"/>
Shrink sleeves	<input type="text"/>	<input type="text"/>
Labels	<input type="text"/>	<input type="text"/>
Lidding	<input type="text"/>	<input type="text"/>
Sachets	<input type="text"/>	<input type="text"/>
Stick packs	<input type="text"/>	<input type="text"/>
Shrink wrap	<input type="text"/>	<input type="text"/>
Stretch films	<input type="text"/>	<input type="text"/>
Wrappers/wraps (food/sandwich)	<input type="text"/>	<input type="text"/>
Shipping (primary packaging)	<input type="text"/>	<input type="text"/>
Shipping (secondary packaging - Ex., dunnage, pouches, mailers/envelopes)	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

Other (please specify)



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End-use Markets and Outlets

This page is one question, focusing on the sales in specific end markets for your products.

11. Please Indicate the **approximate percent of your sales** for each of the following **end-use markets** for **2022 and 2023** (total for each year should equal 100):

	2022	2023
Food (retail)	<input type="text"/>	<input type="text"/>
Food (non-retail)	<input type="text"/>	<input type="text"/>
Beverages	<input type="text"/>	<input type="text"/>
Personal care (health & beauty aids)	<input type="text"/>	<input type="text"/>
Pet food	<input type="text"/>	<input type="text"/>
Tobacco/Cannabis (smoking or vaping)	<input type="text"/>	<input type="text"/>
Other retail non-food	<input type="text"/>	<input type="text"/>
Institutional non-food	<input type="text"/>	<input type="text"/>
Industrial applications	<input type="text"/>	<input type="text"/>
Medical devices/Pharmaceuticals	<input type="text"/>	<input type="text"/>
Nutraceuticals/Cannabis (Non-smoking/vaping)	<input type="text"/>	<input type="text"/>
Shipping (Ex., dunnage, pouches, mailers/envelopes)	<input type="text"/>	<input type="text"/>
Consumer Products (storage wraps & trash bags)	<input type="text"/>	<input type="text"/>

12. If you marked that your company is involved in the **"Food (Retail)"** category in the previous question, approximately **what percent of your sales are in each of the following categories** for 2023?

(Please use only whole numbers. Your sum should equal 100.)

	2023
Confectionery	<input type="text"/>
Fresh produce	<input type="text"/>
Fresh 'other'	<input type="text"/>
Frozen protein	<input type="text"/>
Frozen 'other'	<input type="text"/>
Refrigerated dairy	<input type="text"/>
Refrigerated protein	<input type="text"/>
Salty snacks	<input type="text"/>
Shelf stable goods	<input type="text"/>
Other	<input type="text"/>

Other (please specify)



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Capital Expenditures

This page focuses on capital expenditures.

13. Please indicate approximate **level of actual capital spending** for 2022 & 2023 and planned for 2024 by checking appropriate **capital spending as a percent of net sales/revenue:**

	2022 Actual	2023 Actual	2024 Planned
Capital spending as a percent of net sales/revenue:	<input type="text"/>	<input type="text"/>	<input type="text"/>

14. For 2023, **did your company have (lower, the same, higher) capital spending** for additional capacity, building equipment, etc. compared to 2022?

- ☐ Lower
☐ Same
☐ Higher

15. Please indicate **planned purpose** of 2024 capital spending (**as a % of 2024 capital spending budget**).

Total should equal 100.

Building & Infrastructure (Equipment that supports production process)

New production equipment

Upgrades to existing production equipment

Other



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Operations, Cost & Profitability

16. Please provide **expenses/costs and profit margin** for **2022** as a **% of flexible packaging** related to **net sales**: (The total should add up to 100.)

Materials Used, as a percent of net sales

Direct Labor, as a percent of net sales

Sales/Mktg, R&D and Admin, as a percent of net sales

All Other Mfg Costs, as a percent of net sales

Company Profit Margin (operating profit), as a percent of net sales

17. Please provide **expenses/costs and profit margin** for **2023** as a **% of flexible packaging** related to **net sales**: (The total should add up to 100.)

Materials Used, as a percent of net sales

Direct Labor, as a percent of net sales

Sales/Mktg, R&D and Admin, as a percent of net sales

All Other Mfg Costs, as a percent of net sales

Company Profit Margin (operating profit), as a percent of net sales

18. Please estimate your company's material purchases as a **percent of total material purchases** (in \$ dollars) and comparison to the previous year in the following categories:

	2023 % of Total Material Purchases	Compared to 2022
Resin	<input type="text"/>	<input type="text"/>
Film (including non-woven)	<input type="text"/>	<input type="text"/>
Paper	<input type="text"/>	<input type="text"/>
Aluminum foil	<input type="text"/>	<input type="text"/>
Adhesives	<input type="text"/>	<input type="text"/>
Inks	<input type="text"/>	<input type="text"/>
Coatings	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

Other (please specify)



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Sustainability

19. When considering the following emerging materials, please identify if you are **using/producing today** and the **level of importance** (future use expectations) you see these materials **over the next 3 years**.

	Using today?	Importance in 3 years (Future use expectations)
PCR inclusion	<input type="text"/>	<input type="text"/>
Recycle ready (all-PE)	<input type="text"/>	<input type="text"/>
All-PP or Mixed Polyolefin (PE & PP)	<input type="text"/>	<input type="text"/>
Biobased	<input type="text"/>	<input type="text"/>
Reuse/refill	<input type="text"/>	<input type="text"/>
Compostable	<input type="text"/>	<input type="text"/>
Paper (as flexible substrate)	<input type="text"/>	<input type="text"/>

20. Of your organization's **total production waste** (excluding office/lunchroom waste) generated, **what percent (%) goes to landfill and what percent (%) is recycled, reused, reprocessed or repurposed?**

Total should equal 100.

	2022	2023
Net waste to landfill	<input type="text"/>	<input type="text"/>
Net waste recycled	<input type="text"/>	<input type="text"/>

21. What trends do you see in emerging materials/products?

These may include PCR, recycle ready, biobased, reuse/refill, compostable, LCA impacts, substrate substitution (i.e., plastic to paper, glass to plastic, flexible to non-flexible) or other emerging materials.

A large, empty rectangular box with a thin black border, intended for the user to provide their answer to question 21. A small diagonal line is visible in the bottom right corner of the box.

22. What sustainability trends on material usage or structures do you see as a percentage of your overall sales? (Ex. "We have seen a 30% increase in all-PE or paper based structures".)

A large, empty rectangular box with a thin black border, intended for the user to provide their answer to question 22. A small diagonal line is visible in the bottom right corner of the box.



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Film, Resin & Paper Usage

23. Please provide a **percentage breakdown** ("best effort" estimate) **by FILM type**, of your total film used in 2023.

Please use only whole numbers and sum must equal 100.

PE (all types)

PP (all types)

PS

PVC

Polyester

Nylon

Biopolymers

Other

24. Please provide a **percentage breakdown** ("best effort" estimate) **by RESIN type**, of your total resin used in 2023.

Please use only whole numbers and sum must equal 100.

PE (all types)

PP (all types)

PS

PVC

Polyester

Nylon

Biopolymers

Other

25. Please provide a **percentage breakdown** ("best effort" estimate) **by PAPER type**, of your total paper used in 2023.

Please use only whole numbers and sum must equal 100.

Bleached Kraft	<input type="text"/>
Unbleached Kraft	<input type="text"/>
Clay Coated	<input type="text"/>
Grease Resistant	<input type="text"/>
Recycled Content	<input type="text"/>
Colored Kraft	<input type="text"/>
Release Treated	<input type="text"/>
Wax Paper	<input type="text"/>
Glassine	<input type="text"/>
Other	<input type="text"/>



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Printing

26. Please estimate the **percent** of your company's sales for the following print categories for 2022 and 2023 (Total should equal 100).

	2022	2023
Gravure	<input type="text"/>	<input type="text"/>
Offset	<input type="text"/>	<input type="text"/>
Flexo	<input type="text"/>	<input type="text"/>
Digital	<input type="text"/>	<input type="text"/>
Unprinted	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

Other (please specify)

27. Where are you making investment in your printing infrastructure?

- ☐ Gravure
- ☐ Offset
- ☐ Flexo
- ☐ Digital

Other printing technology (please specify) or other comments



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Outlook

The page looks at your projections of where you see growth and opportunity for flexible packaging over the next 3-5 years.

28. Please indicate those **issues** expected to be the **most important to your company in the year (2024)** by selecting the **top 5 issues in the list, with # 1 as the most important**.

In the text box, please describe what's driving the top issues & why they are important.

	Most Important	2nd	3rd	4th	5th
Labor pool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Management talent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Raw material pricing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growth/new products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sustainability/green initiatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Productivity/cost reductions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Profit margin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Imports/international sourcing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Political uncertainty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Economy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pandemic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prices (to customers)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Logistics/transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supply chain resilience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Plastic perception/backlash	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Why are these the most important issues to your business?

29. Is your company **planning to pursue/undertake an acquisition in 2024 or in the next 3-5 years?**

	2024	2026-2028
Planning to undertake an acquisition?	<input type="checkbox"/>	<input type="checkbox"/>

30. Looking ahead to the current year **(2024)** and out the next three years **(2026-2028)**, what are your company's expectations of **annual** growth in **net sales and volume** (by weight)?

Please indicate annual growth rate percentage expected (ex. 3.2 or -1.2):

Net Sales (2024 vs 2023)

Net Sales (2028 vs. 2023)

Volume (growth % - weight) (2024 vs. 2023)

Volume (growth % - weight) (2028 vs. 2023)

31. Please describe **your vision of where the flexible packaging industry is headed** over the **next 3-5 years**.

32. What type of **developing technologies** will have the **most impact** on flexible packaging **over the next 3-5 years?**

(Examples: Artificial intelligence, cobots, automation, augmented reality, Internet of Packaging, new sealing techniques, recyclable monolayer structures, paper with barrier coatings or other.)

33. What do you see as the **future impact of developing tools & technologies on your business?** (This may include software, digital printing, adding QR or digital codes, traceability, etc.)

34. **What keeps you up at night?** (What are 'big issues' that your company or the flexible packaging industry needs to address?)

35. As you look ahead over the **next three to five years**, what are your expectations for the **key growth markets for flexible packaging?**

	Low/ no growth		Moderate growth		Most growth
Food (retail)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food (non-retail)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Beverages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personal care (health & beauty aids)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pet food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tobacco/Cannabis (smoking or vaping)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other retail non-food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutional non-food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Industrial applications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medical devices/Pharmaceuticals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nutraceuticals/Cannabis (non-smoking/vaping)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consumer Products (storage wraps & trash bags)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shipping (bubble wrap, mailers, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

36. As you look ahead the **next 3-5 years**, what are your expectations for **change in substrate/materials usage** (tons/pounds) for flexible packaging?

Note: You only need to answer for materials you anticipate using in 3-5 years.

This question pertains to **FILM**.

	Future Growth
HDPE	<input type="text"/>
LDPE	<input type="text"/>
LLDPE	<input type="text"/>
MDPE	<input type="text"/>
Metallocene	<input type="text"/>
Plastomer	<input type="text"/>
Copolymer (EVA, EMA, EAA, etc.)	<input type="text"/>
Cast PP	<input type="text"/>
OPP	<input type="text"/>
PS	<input type="text"/>
PVC	<input type="text"/>
Polyester	<input type="text"/>
Nylon	<input type="text"/>
EVOH	<input type="text"/>
PVDC coated	<input type="text"/>
Metallized film	<input type="text"/>
SiOx and AlOx coated film	<input type="text"/>
Post Consumer Recycled (PCR)	<input type="text"/>
PLA	<input type="text"/>
PHA	<input type="text"/>
Starch	<input type="text"/>
Other biobased films	<input type="text"/>
Aluminum foil	<input type="text"/>

37. As you look ahead the **next 3-5 years**, what are your expectations for **change in substrate/materials usage** (tons/pounds) for flexible packaging?

Note: You only need to answer for materials you anticipate using in 3-5 years.

This question pertains to **RESINS**.

	Future Growth
HDPE	
LDPE	<input type="text"/>
LLDPE	<input type="text"/>
MDPE	<input type="text"/>
Metallocene	<input type="text"/>
Plastomer	<input type="text"/>
Copolymer (EVA, EMA, EAA, etc.)	<input type="text"/>
PP	<input type="text"/>
PS	<input type="text"/>
PVC	<input type="text"/>
Polyester	<input type="text"/>
Nylon	<input type="text"/>
EVOH	<input type="text"/>
Post-Consumer Recycled (PCR)	<input type="text"/>
PLA	<input type="text"/>
PHA	<input type="text"/>
Starch	<input type="text"/>
Other bioresins	<input type="text"/>
Ext resins (tie layers)	<input type="text"/>
Ionomer	<input type="text"/>

38. As you look ahead the **next 3-5 years**, what are your expectations for **growth in substrate/materials usage** (tons/pounds) for flexible packaging?

Note: You only need to answer for materials you anticipate using in 3-5 years.

This question pertains to **PAPER**.

	Future Growth
Bleached Kraft	<input type="text"/>
Unbleached Kraft	<input type="text"/>
Colored Kraft	<input type="text"/>
Clay Coated	<input type="text"/>
Grease Resistant	<input type="text"/>
Release Treated	<input type="text"/>
Recycled Content	<input type="text"/>
Wax Paper	<input type="text"/>
Glassine	<input type="text"/>

39. As you look ahead the **next 3-5 years**, what are your expectations for **change in substrate/materials usage** (tons/pounds) for flexible packaging?

Note: You only need to answer for materials you anticipate using in 3-5 years.

This question pertains to **ADHESIVES**.

	Future Growth
Solvent based	<input type="text"/>
Solventless (100% solids)	<input type="text"/>
Waterborne	<input type="text"/>
Radiation cured (UV/EB)	<input type="text"/>

40. As you look ahead the **next 3-5 years**, what are your expectations for **change in substrate/materials usage** (tons/pounds) for flexible packaging?

Note: You only need to answer for materials you anticipate using in 3-5 years.

This question pertains to **INKS.**

	Future Growth
Matched color inks	<input type="text"/>
4 color process inks	<input type="text"/>
Metallic inks	<input type="text"/>
6 & 7 color process inks	<input type="text"/>
Surface printing inks	<input type="text"/>
Lamination inks	<input type="text"/>
Water based inks	<input type="text"/>
Solvent based inks	<input type="text"/>
Fluorescent inks	<input type="text"/>
UV/EB inks	<input type="text"/>
High strength inks	<input type="text"/>
Fade resistant	<input type="text"/>
Digital	<input type="text"/>
Soy/vegetable inks	<input type="text"/>

41. As you look ahead the **next 3-5 years**, what are your expectations for **change in substrate/materials usage** (tons/pounds) for flexible packaging?

Note: You only need to answer for materials you anticipate using in 3-5 years.

This question pertains to **COATINGS**.

	Future Growth
UV/EB coatings	<input type="text"/>
Barrier coatings (including paper)	<input type="text"/>
High gloss coatings	<input type="text"/>
Cold seal release lacquer	<input type="text"/>
Extrusion primer	<input type="text"/>
Other primers	<input type="text"/>
Heat seal coatings	<input type="text"/>
Anti-fog coatings	<input type="text"/>
Matte coatings	<input type="text"/>
Cold seal coatings	<input type="text"/>
Pressure sensitive coatings	<input type="text"/>



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FINAL PAGE

If your survey is complete, please hit the "DONE" button and your data will be submitted. An email with your company responses will be sent to the original contact upon survey completion.

If you need to continue adding data, please do not hit the 'Done' button. You can forwarding the original email with the survey link to a colleague to help complete specific questions.

Thank you for taking the time to complete this extensive survey. The final report will be a great benefit for our flexible packaging community.