

# FSEA Industry Survey

## Foil Stamping Die Manufacturers

The following survey was conducted through a third party organization specializing in on-line surveys and email marketing. The five part survey focuses on current industry trends. This portion of the survey was developed for suppliers of foil stamping and embossing dies/engravings. There were a total of 197 respondents to the entire survey and a total of 15 respondents to this portion of the survey after duplicate companies were eliminated.



### How many employees do you have at your location?

Less than 10		38%
10-49		35%
50-99		12%
More than 100		15%

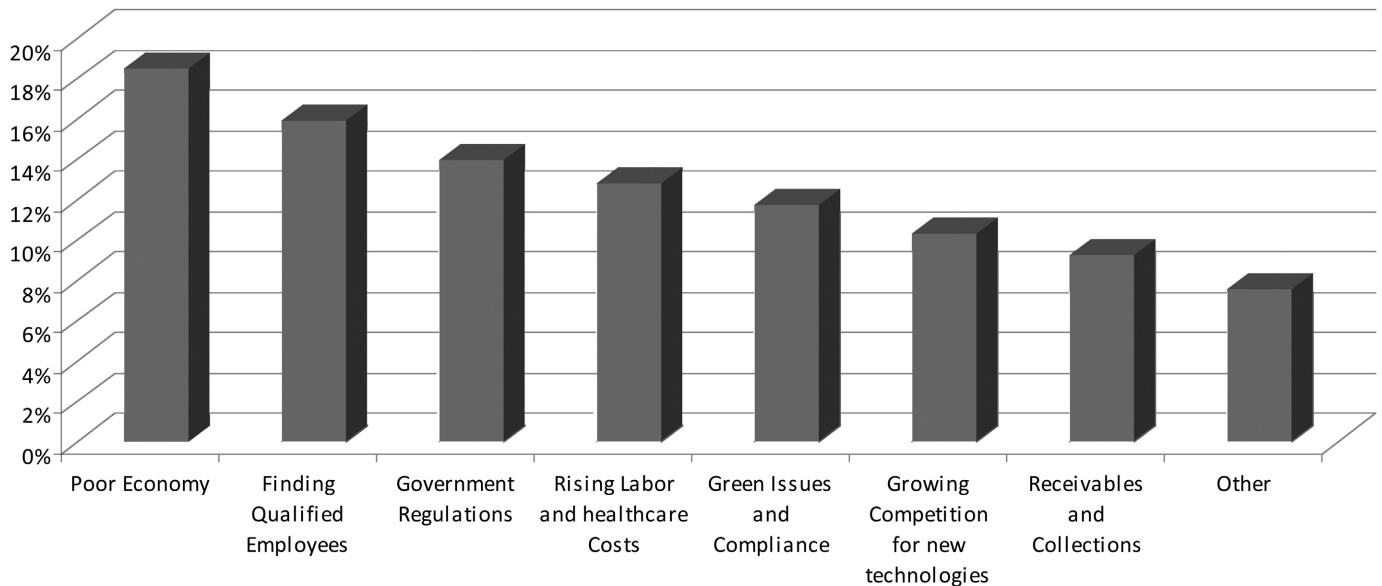
### What region of the country are you located in?

West		20%
Midwest		37%
East		34%
Other		9%

### Are you a Foil Stamper/Finisher or a Supplier to the Industry?

Foil Stamper/Finisher		66%
Supplier to the Industry		34%

### What are your main business concerns currently? Rank them from highest concern to lowest.



## What percentage of your die business is comprised of the following type of dies sold?

	0%	10%	20%	30%	40%	50%	60%	70%	80%	90-100%
Magnesium Foil Stamping	33%	8%	0%	8%	17%	8%	0%	0%	8%	17%
Magnesium Embossing	42%	17%	17%	17%	0%	0%	0%	0%	0%	8%
Copper Foil Stamping	11%	22%	11%	11%	22%	11%	11%	0%	0%	0%
Copper Embossing	22%	67%	0%	0%	0%	0%	11%	0%	0%	0%
Brass Foil Stamping	20%	40%	0%	0%	10%	20%	0%	0%	0%	10%
Brass Embossing	18%	36%	0%	9%	0%	27%	0%	0%	0%	9%
Rotary Foil Stamping	50%	33%	0%	0%	17%	0%	0%	0%	0%	0%
Rotary Embossing	57%	29%	0%	0%	14%	0%	0%	0%	0%	0%

For Magnesium die suppliers that also manufacture other dies as well, they responded that foil stamp dies are between 30-50% of their business and Emboss dies are between 10-30%. Suppliers that manufacture exclusively Magnesium dies, they report about 90% of their business is foil dies and 10% emboss dies.

For Copper die suppliers, Foil dies comprise between 10-60% of their work, while Emboss dies are typically 10%. Brass foil dies are most commonly about 10% of the work. However, brass emboss dies range from several suppliers indication 10% to a few at 50%. Most Rotary suppliers report these dies to be 10% of their work.

## What is your EXPECTED change in the volume of Foil Dies sold for the next 12 months?

Increase less than 10%		38%
Increase between 11-20%		30%
Increase more than 20%		24%
Decrease up to 10%		8%
Decrease more than 10%		0%

## What was your ACTUAL change in the volume of Foil Dies sold for the previous 12 months?

Increased less than 10%		28%
Increased between 11-20%		28%
Increased more than 20%		28%
Decreased up to 10%		8%
Decreased more than 10%		8%

## What was your ACTUAL change in the volume of Emboss Dies sold for the previous 12 months?

Increased less than 10%		38%
Increased between 11-20%		16%
Increased more than 20%		30%
Decreased up to 10%		8%
Decreased more than 10%		8%

## What is your EXPECTED change in the volume of Emboss Dies sold for the next 12 months?

Increase less than 10%		38%
Increase between 11-20%		23%
Increase more than 20%		23%
Decrease up to 10%		16%
Decrease more than 10%		0%

**Do you expect growth over the next 12 months, and if so, to what do you attribute that growth?**

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I don't expect growth over the next 12 months		28%
Increase in my company's market share		43%
Increase in overall market size due to industry growth		21%
My existing customer base is using more foil		0%
Other		8%

**What do you attribute most for your expected lack of growth in sales over the next 12 months?**

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Decrease in my company's market share		25%
Decrease in overall market size due to lack of growth in the industry		50%
My existing customer base is using less foil		0%
Other		25%