



***SMART SOLUTIONS TO DRIVE THE FUTURE***

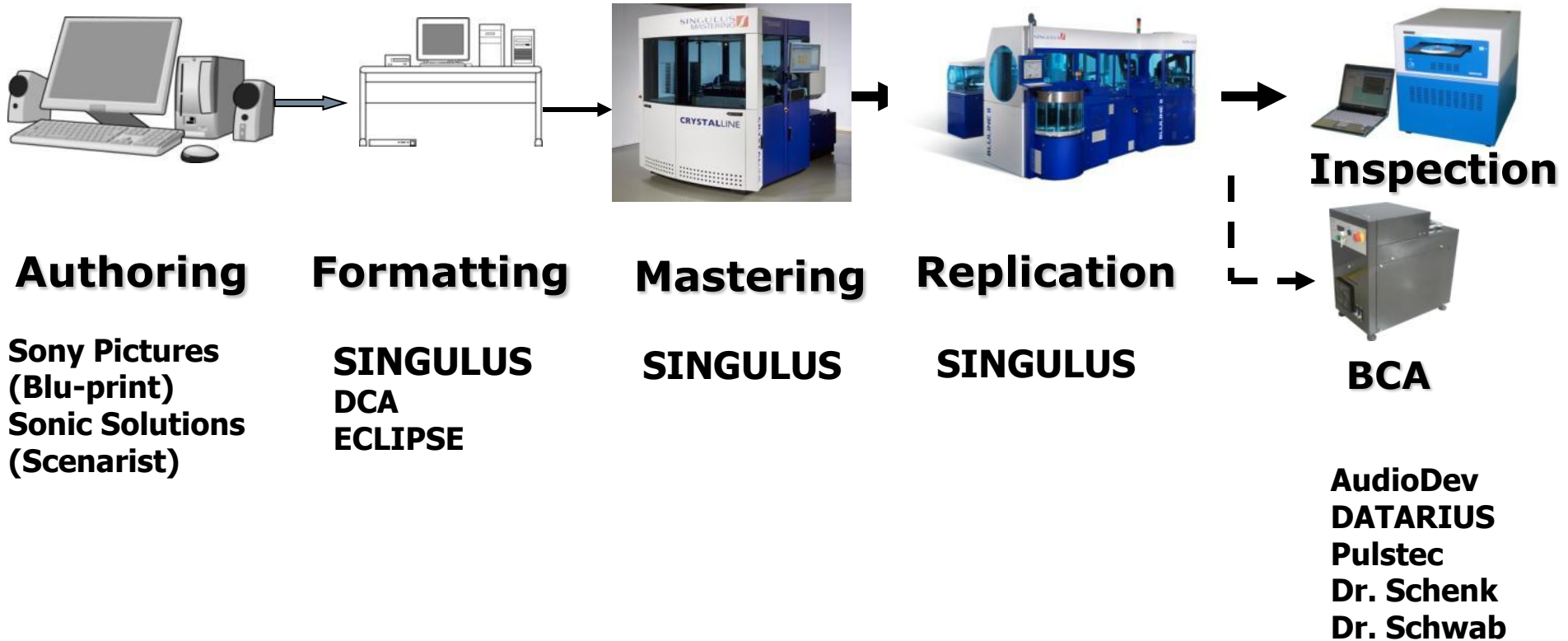
**Sylvia Hitzel**  
**Vice President Marketing & Sales**

**SINGULUS TECHNOLOGIES AG**

**SINGULUS** 



Fascination Blu



## Tools and equipment available for Replicators

*\* This list is just an example and does not represent the entire industry*

# Top 5 Global Blu-ray Video Replicators by Disc Production: 2009 & 2010

## **Sony DADC**

266.1 Million Discs

- USA, Australia, Austria, China, Japan

## **technicolor**

42.7 Million Discs

- Mexico, Poland, Australia

## **Cinram**

30.6 Million Discs

- USA, Germany

## **arvato digital services**

7.6 Million Discs

- USA, Germany

## **Panasonic**

4.5 Million Discs

- USA, Japan

## **Sony DADC**

379.3 Million Discs

- USA, Australia, Austria, China, Japan

## **technicolor**

73.6 Million Discs

- Mexico, Poland, Australia

## **Cinram**

44.0 Million Discs

- USA, Germany

## **arvato digital services**

17.6 Million Discs

- USA, Germany

## **QOL**

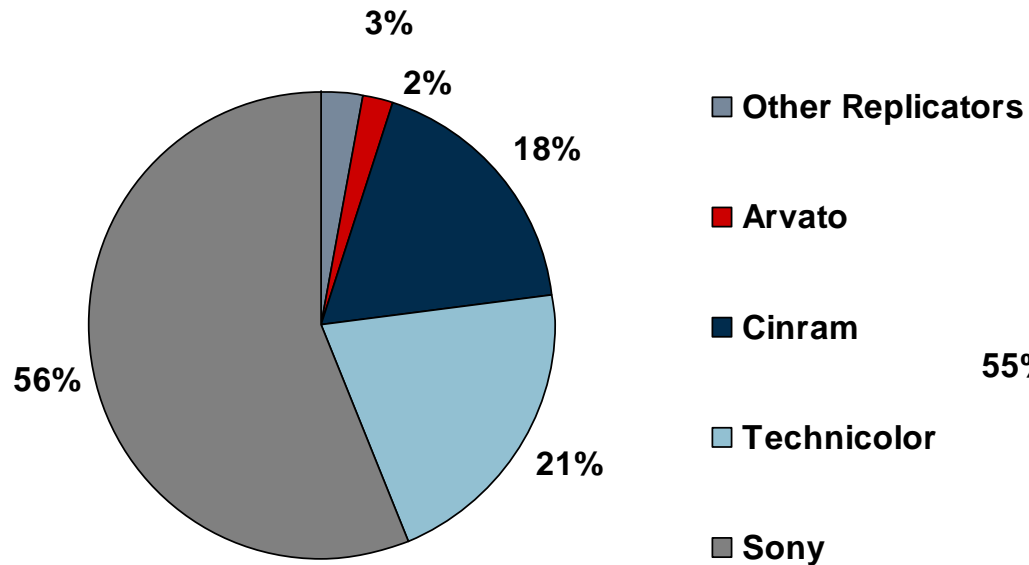
7.5 Million Discs

- France

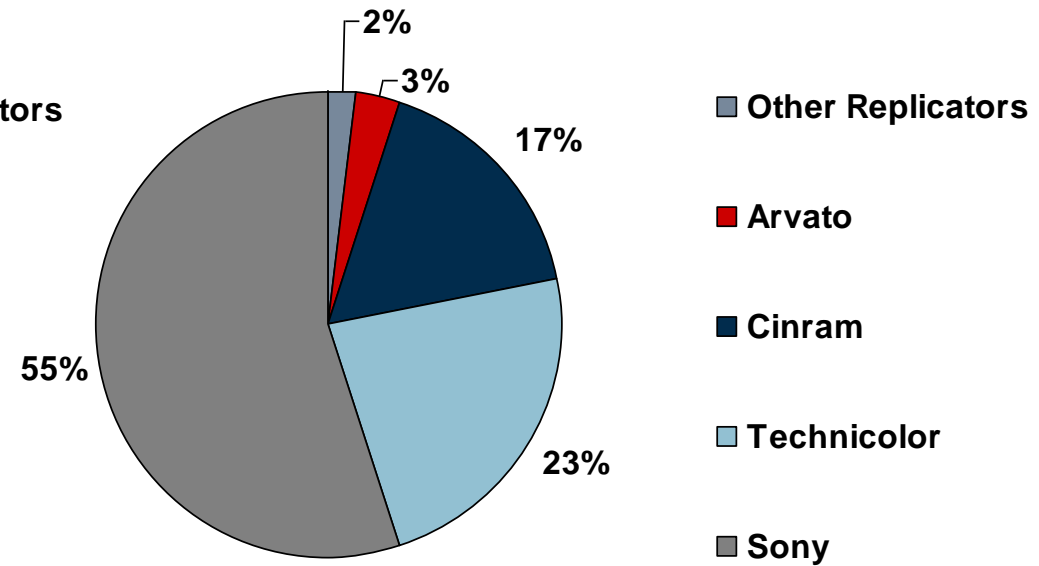
# Tier 1 Replicator Blu-ray Video Market Share Evolution: 2009 to 2010

## North America Blu-ray Video Production

2009: 159 Million Discs



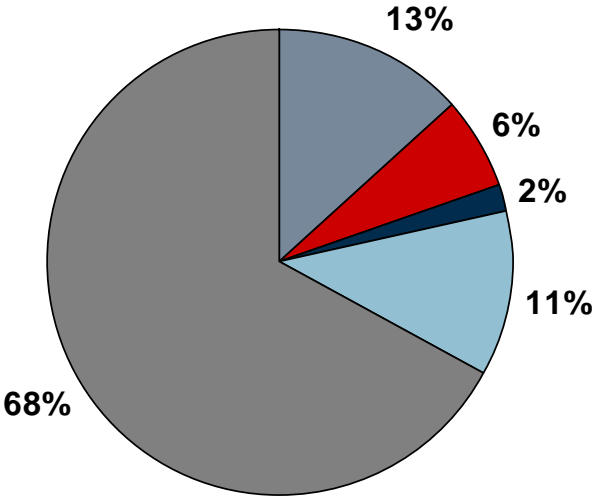
2010 Projection: 241 Million Discs



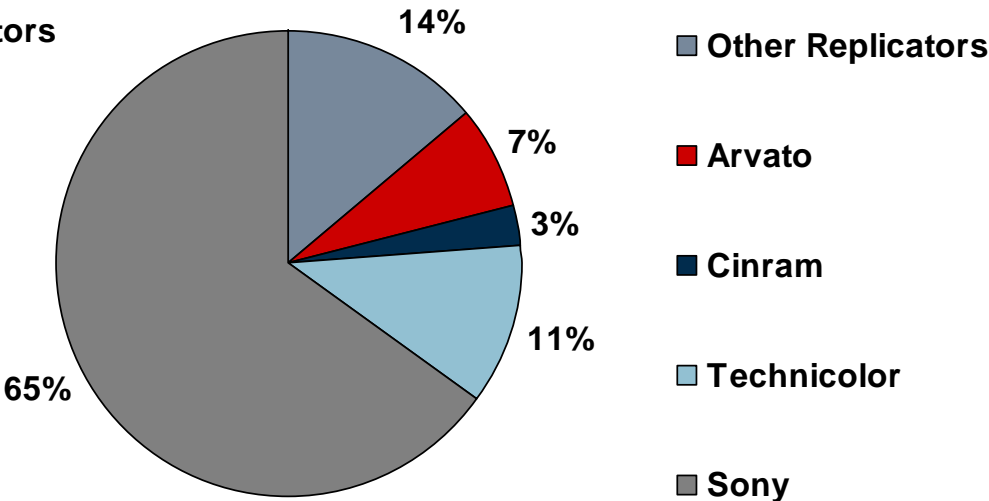
# Tier 1 Replicator Blu-ray Video Market Share Evolution: 2009 to 2010

## Europe Blu-ray Video Production

2009: 76 Million Discs



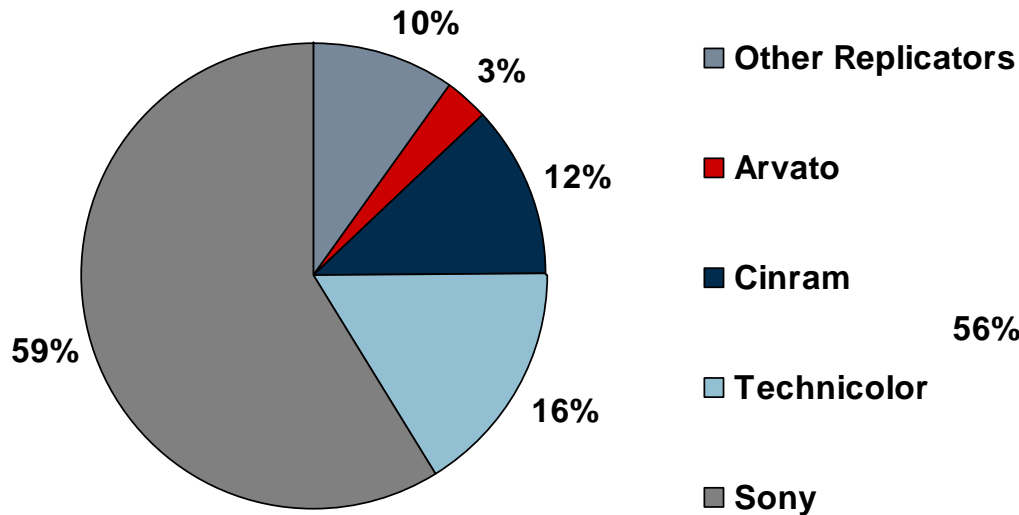
2010 Projection: 147 Million Discs



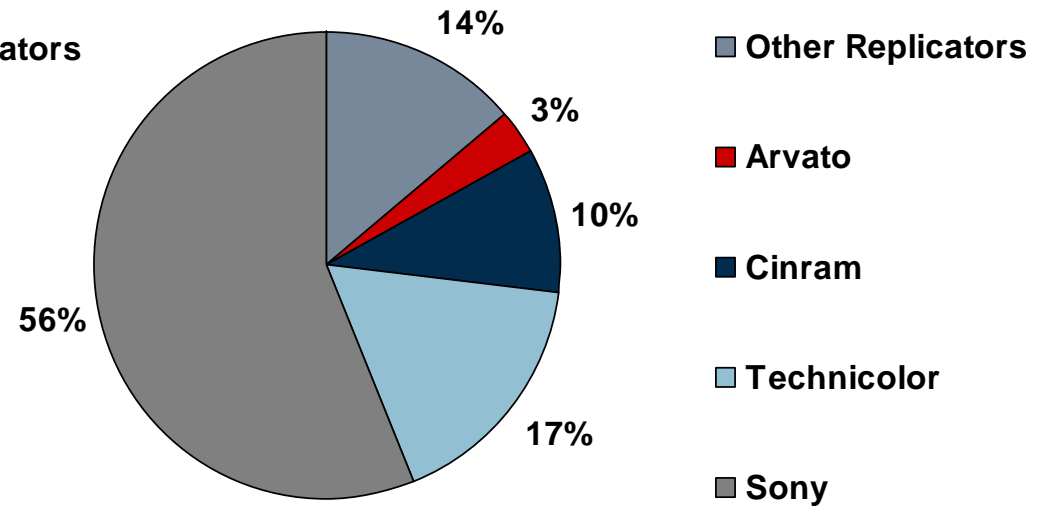
# Tier 1 Replicator Blu-ray Video Market Share Evolution 2009 to 2010

## Worldwide Blu-ray Video Production

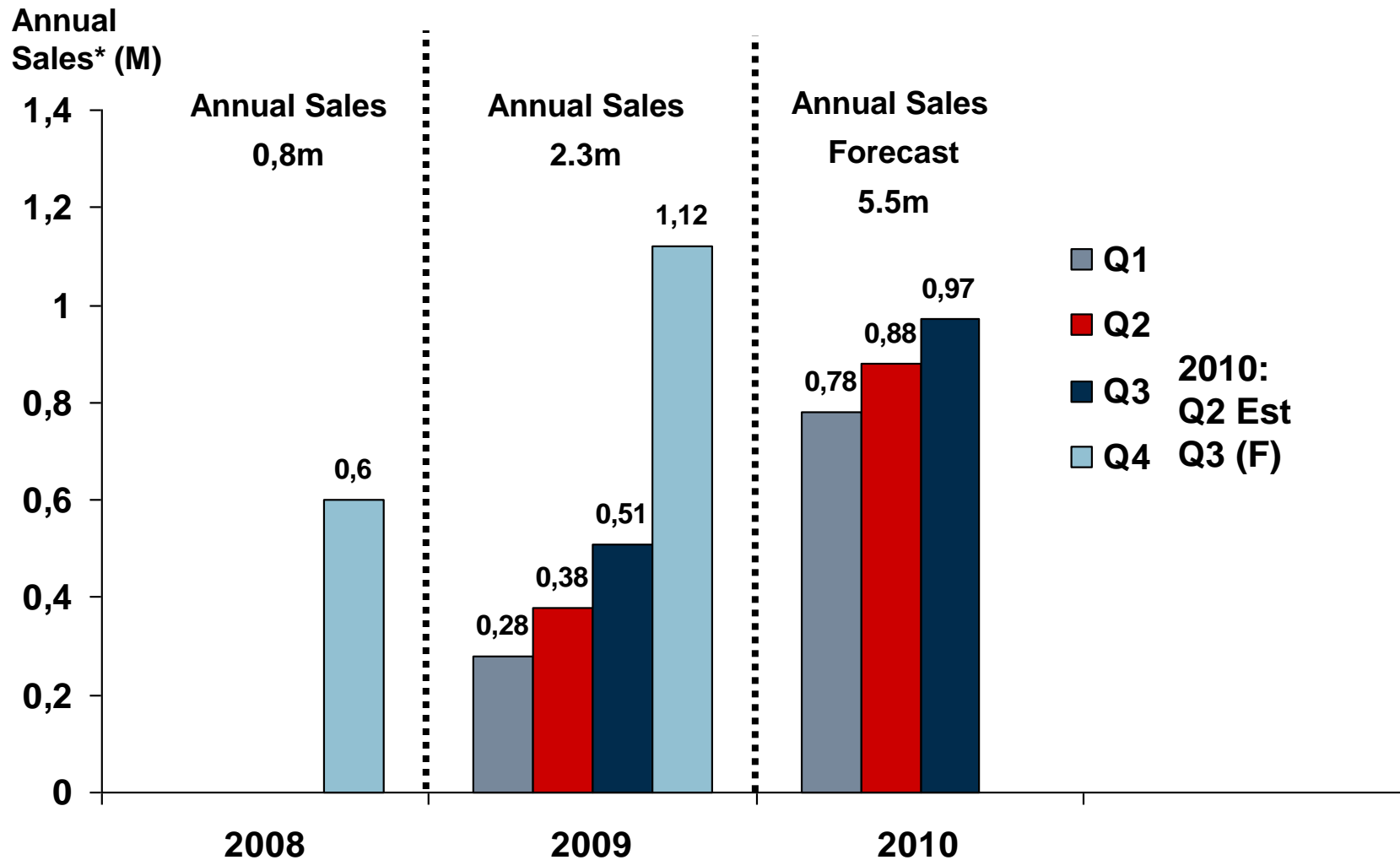
2009: 259 Million Discs



2010 Projection: 438 Million Discs



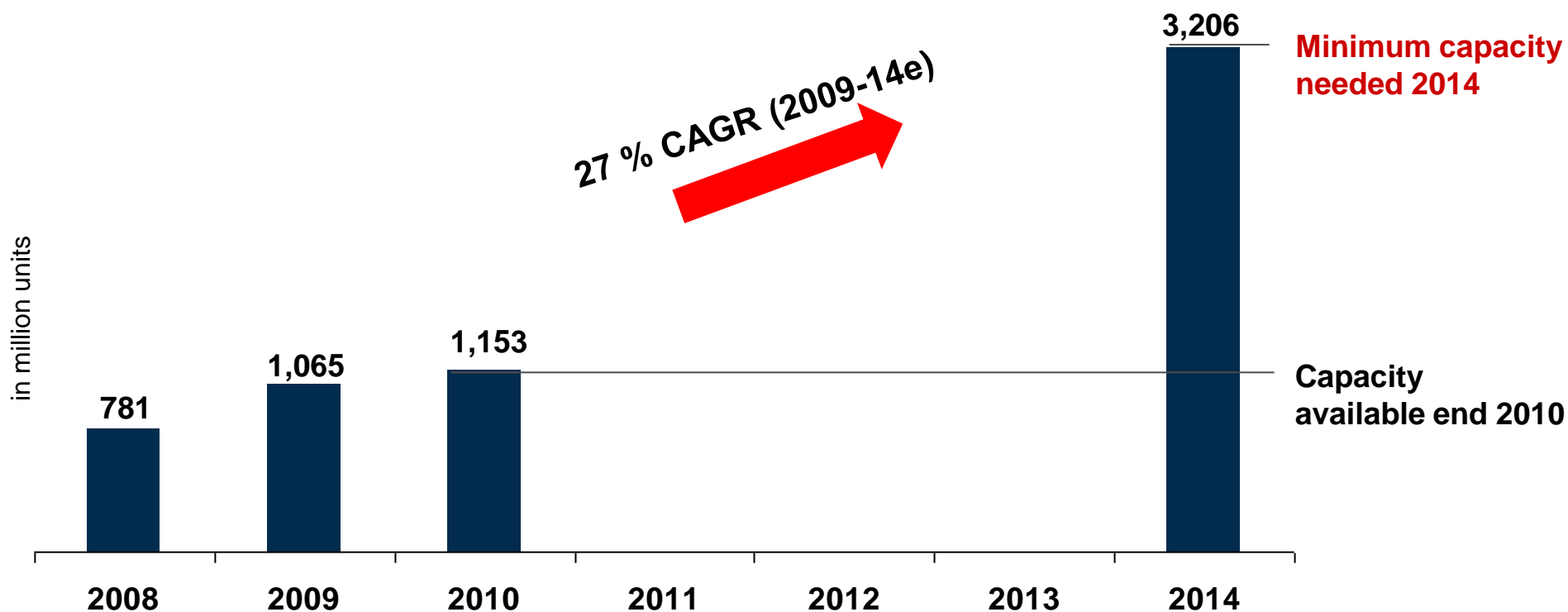
# European Blu-ray Player Sales Building Up



\* Data relates to top 16 European markets.

# Minimum Future Prerecorded Blu-ray Pressing Capacity worldwide

**Significant Growth potential is forecasted for the foreseeable future**



# Amazon.de: 393 New Blu-ray Releases in the Next 3 Months

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- 10 -



# Catalogue Production will Further Increase Blu-ray Demand

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Warner Bros. Blu-ray - Mozilla Firefox

atei Bearbeiten Ansicht Chronik Lesezeichen Extras Hilfe

http://www.warnerbros.com/warnerblu/

Meistbesuchte Seiten Erste Schritte Aktuelle Nachrichten SINGULUS TECHNOL... Solar Power Internati... www.photovoltai... Sparkasse Hanau (50... Posteingang - Outloo... Währungsre

Warner Bros. Blu-ray

HOME MOVIES TV ON DEMAND VIDEOGAMES BROWSE ALL SHOP SEARCH SIGN UP FOR EMAIL UPDATES facebook

WarnerBlu

FOR THE FIRST TIME  
REMASTERED ON BLU-RAY

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WB Blu-ray  
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POTTER  
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Ultimate Editions!

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SWAP ANY DVD  
FOR A NEW  
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WHAT IS  
BLU-RAY  
DISCOVER THE ANSWER

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Home > Home Entertainment > Packaged Media (Blu-ray & DVD) > Disc Replication > Blu-ray Disc and DVD Replication

3D +

ANIMATION & VFX +

CINEMA +

BROADCAST +

**HOME ENTERTAINMENT -**

- ⊙ Packaged Media (Blu-ray & DVD)
  - ⊙ Disc Preparation
  - ⊙ Disc Replication
    - Blu-ray Disc and DVD Replication**
    - Xbox Replication
  - ⊙ Disc Distribution
- \_\_DOCUMENTATION\_\_
  - Manufacturing Specifications

HOME NETWORKING +

ADVERTISING +

RESEARCH & INNOVATION +

## Blu-ray Disc and DVD Replication

### Home Entertainment Services

Technicolor was present at the birth of DVD, is a founding member of the Blu-ray Disc Association and is the first company to have put 3D content onto Blu-ray discs



technicolor

00:22 / 03:32

management services for the Hollywood studios, software publishers, game publishers and independent rights holders.

[Blu-ray Disc, DVD and CD specifications.](#)

### Key Capabilities

- Disc replication including Blu-ray Disc, DVD and CD
- Full turnkey inventory control and management

 **DVD & BLU-RAY FOR WB**

Technicolor announces a Strategic Partnership with Warner Bros.

[READ MORE](#)

 **GAMESUPPLY AWARD**

Technicolor receives GameSupply Chain Award

[READ MORE](#)

 **3D TV ALLIANCE**

3D TV Alliance with Dreamworks & Samsung

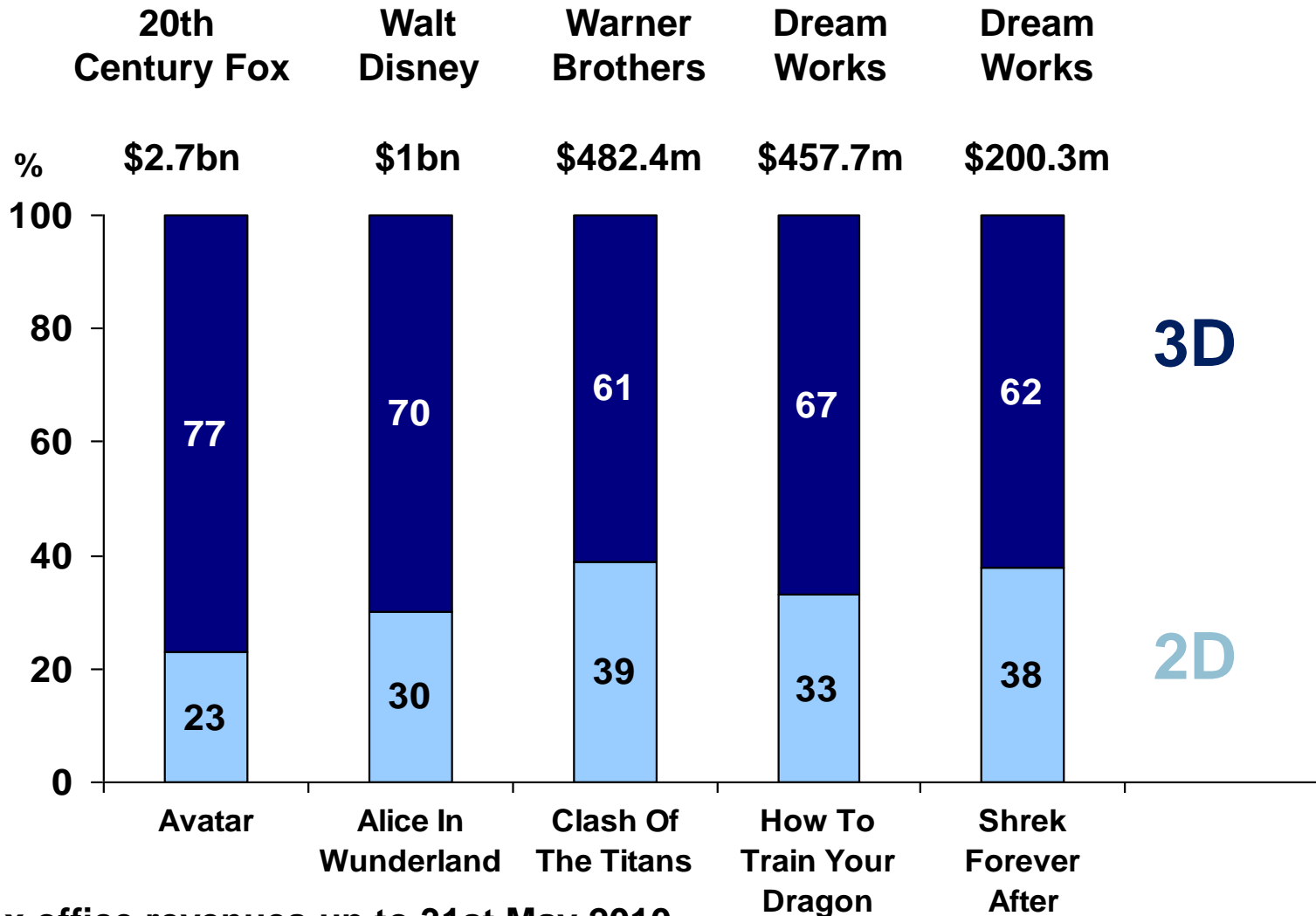
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 **3D INNOVATIONS**

Technicolor Brings 3D to the Home and Beyond

[READ MORE](#)

# Global Box Office Revenue Breakdown



Box office revenues up to 31st May 2010

# 3D in the Third Dimension



## EVERYTHING 3D | NPD is your 3D authority

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This space is dedicated to providing the latest news and views on 3D technology, as it is incorporated in products across industries and transforms today's standards. Stay informed – new research, industry analyst perspectives, insight on adoption, and key data points are updated regularly and shared here for your reference.

[The NPD Group](#) answers questions related to everything 3D: *How fast will 3D be adopted by consumers? What obstacles are expected to impede adoption, and how might the industry address them? How do the type and amount of content available affect 3D adoption? What are consumers' perceptions and concerns about 3D glasses?*

▶ 3D Forecast | ▶ 3D TV Sales | ▶ 3D Gaming | ▶ 3D Content | ▶ 3D Glasses

### North America will dominate 3D TV sales

Year	Emerging	Western Europe	Japan	North America
2010	0	0	0	~2,000
2011	0	~2,000	~3,000	~5,000
2012	0	~5,000	~5,000	~10,000
2013	~8,000	~8,000	~10,000	~15,000
2014	~12,000	~10,000	~15,000	~20,000

Source: DisplaySearch / Quarterly TV Design and Feature Report

# 3D starts this Year

**USB-Recording**  
zur direkten Aufnahme von Filmen  
auf USB Speichermedien

**3D-Technologie**  
für ein völlig neues, atemberaubendes Filmerlebnis

**200 Hz Technologie**  
für brillante Bilder

**102 cm**  
40" LCD-TV

**Sehr gut**  
**CHIP**  
10/2010

**8 cm flach**

**799,-**

**MEDIA MARKT PREIS**

**SAMSUNG LE 40 C 750**  
**102 cm Full-HD 3D LCD-TV**

3D Full-HD Auflösung 1.920 x 1.080 Pixel, 24p kompatibel, Multituner mit CH+ für Kabel-HD Empfang, DLNA Netzwerkfähig, Anschlüsse: 4x HDMI, 2x Scart, YUV, VGA-Eingang, Abmessungen mit Standfuß (HxBxT) 98,6 x 66,5 x 27,0 cm, Stromverbrauch (in Betrieb / Standby) 190 W / 0,1 W (lt. Herstellerangaben), Art. Nr. 1296309

Deutschlands erster 3D-Eventsender.  
Neu und exklusiv auf Sky.

**SKY 3D**

HD 24p USB DVB-C  
DVB-T 4x HDMI

# 3D Ready: Production Systems for all Blu-ray Formats

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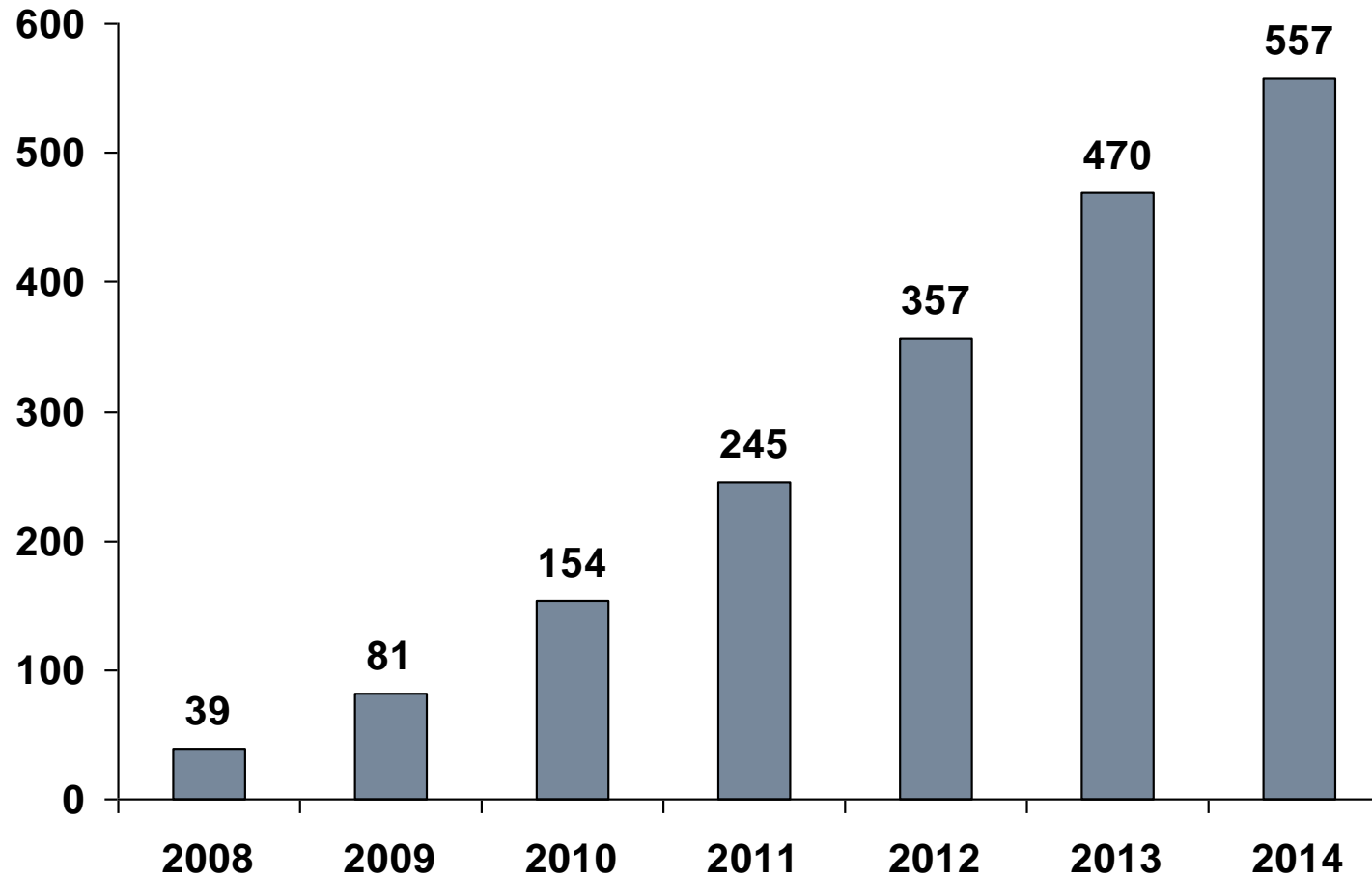


# A new market: BD-R/BD-RE



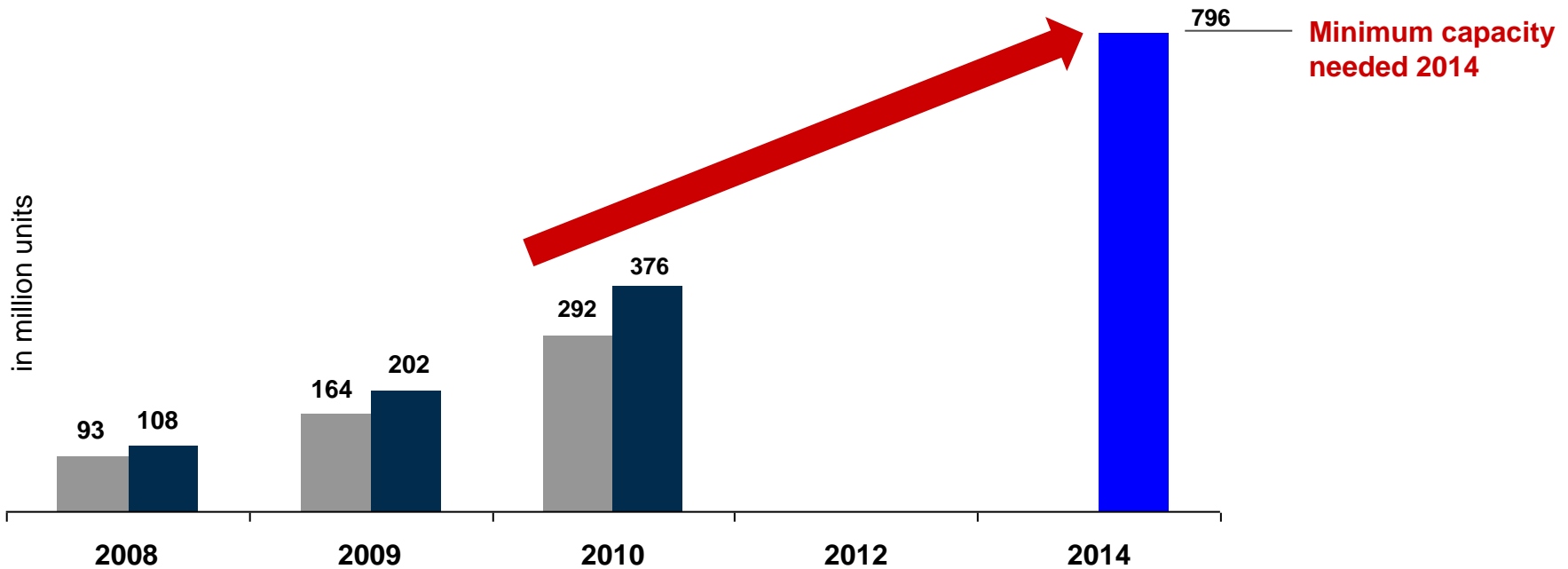
# Projected Global BD-R/RE Disc Production

Million Discs



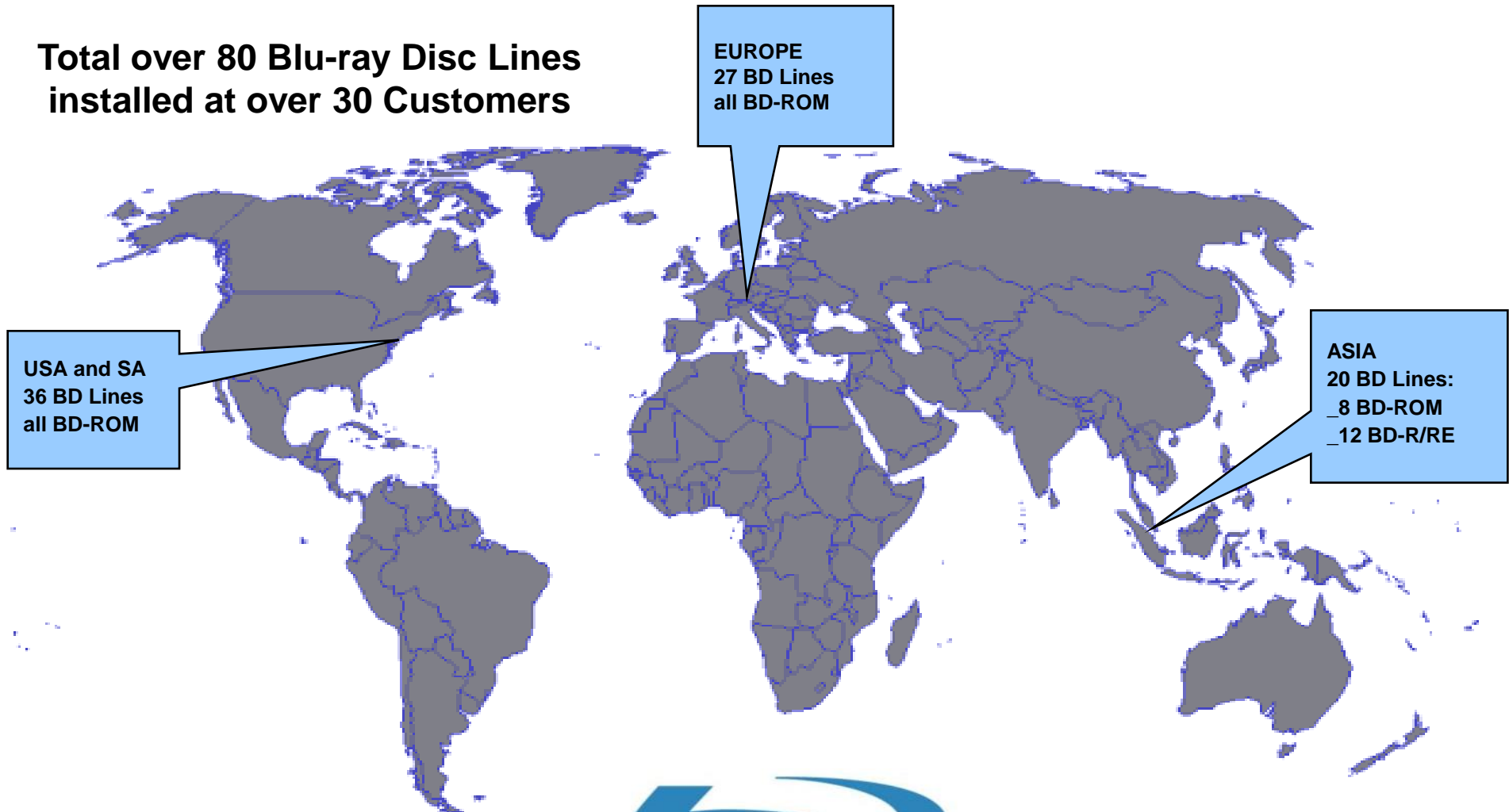
# Optical Disc: Minimum Future Blu-ray Recordable Pressing Capacity Requirements Worldwide

■ Calendar Year Capacity Available ■ Year End Capacity

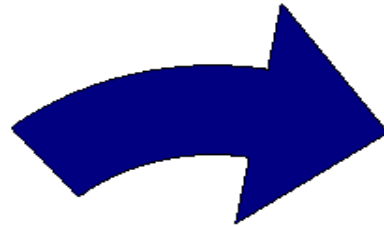
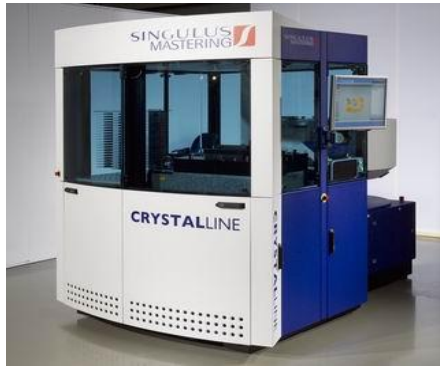


# SINGULUS Blu-ray Disc Lines Installed Base World Wide

**Total over 80 Blu-ray Disc Lines  
installed at over 30 Customers**



# YOUR TOTAL SOLUTION



SINGULUS



**SINGULUS TECHNOLOGIES AG**

Hanauer Landstrasse 103

D-63796 Kahl/Main

**Dr.-Ing. Stefan Rinck, President and CEO**

Tel +49-6188-440-101

Stefan.Rinck@singulus.de

**Markus Ehret, CFO**

Tel +49-6188-440-204

Markus.Ehret@singulus.de

**Dr.-Ing. Anton Pawlakowitsch, COO**

Tel +49-6188-440-205

Anton.pawlakowitsch@singulus.de

**Maren Schuster, Head of Investor Relations**

Tel +49-6188-440-612

Maren.Schuster@singulus.de

**Bernhard Krause, Communications Worldwide**

Tel +49-6181-9828020

Bernhard.Krause@go-metacom.de

## Forward-Looking Statements

This presentation contains forward-looking statements based on current expectations, assumptions and forecasts of the executive board and on currently available information. Various known and unknown risks, unpredictable developments, changes in the economic and political environment and other presently not yet identifiable effects could result in the fact that the actual future results, financial situation or the outlook for the company differ from the estimates given here. We are not obligated to update the forward-looking statements made in this presentation unless there is a legal obligation.