INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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World Pressure Sensitive Tapes

Industry Study with Forecasts to **2010 & 2015**

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INDUSTRY STRUCTURE

Self-adhesive tapes' cost and performance advantages will allow them to capture a greater share of joining, sealing and bonding applications from competitive technologies.

Global demand to grow 4.7% yearly through 2010

The world market for pressure sensitive adhesive (PSA, self-adhesive) tapes is forecast to expand at an annual pace of 4.7 percent through 2010, surpassing 30 billion square meters. Projected growth in tape production will generate demand for 2.8 billion kilograms of raw materials in 2010, including adhesives and various backing substrates. Gains will be bolstered by opportunities in an array of tape-using industries, ranging from corrugated packaging and nonresidential construction to motor vehicle and electronics manufacturing. Self-adhesive tapes' cost and performance advantages will allow them to capture a greater share of joining, sealing and bonding applications from competitive technologies.

World PSA Tape Demand, 2010
(30.7 billion square meters)

Carton sealing, specialty tapes show best prospects

Corrugated carton sealing tapes will remain the most widely used tape type, accounting for over two-thirds of aggregate sales volume. Tapes will make further inroads at the expense of competitive carton sealing media such as glues and mechanical fasteners. Rising corrugated box sales will also bode favorably for packaging tape demand, although a slowdown in processed food and beverage output will limit potential gains. Masking tape demand growth will trail the tape market average, slowed by a weak housing market and shifts toward less tape-intensive industrial coating technologies. Among the other tape types, the best opportunities exist for technical and specialty tapes, such as the double-sided adhesive tapes increasingly utilized in fastening and bonding applications in industries such as building construction, motor vehicle and aerospace assembly, electronics and telecommunications.

China to become world's largest tape user by 2010

The US accounts for over one-fifth of global demand, although its share of the world market will continue to decline, as bedrock applications such as corrugated shipping and paint masking are now largely mature. The same can be said for other developed countries -- West European nations, Japan, Canada, Australia -- where annual demand growth will be in the low single digits. By contrast, there is substantial room for additional market penetration in the world's developing countries, with India, China and Eastern Europe in particular enjoying favorable prospects. Indeed, China is expected to surpass the US as the world's largest tape user by the end of the decade, with gains driven by explosive economic growth, rising consumer incomes, swift development of tape-intensive industries and greater availability of high quality, domestically produced tapes, especially industrial and specialty types. China is also developing a strong export position. East Asia is the leading global market for advanced electronic fabrication tapes.

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Sample Text, Table & Chart

TABLE VI-9

INDONESIA -- PRESSURE SENSITIVE TAPE SUPPLY & DEMAND (million square meters)

Item	1995	2000	2005	2010	2015
Population (mil persons)	198.5				
$ GDP/capita	3380				
Gross Domestic Prdt (bil 2000$)	671				
sq meters/capita	0.9				
sq meters/mil $ GDP	262				
Tape Sales	176				
+ net exports	-65				
Tape Shipments	111				

SAMPLE TABLE

ASIA/PACIFIC

Indonesia: Market Trends

Corrugated carton sealing tapes will continue to domina
market mix, acc demand in 20
ever, growth wil eflecting an i
level of market r n in processe
beverage manufa xplosive 200
recovery. Conti cts in the na
also limit the ava industrial ex
projects. Still, t ckaging tape
the ongoing sup sealing med
as the factors driv packaging in general. The
latter include boxes' relatively low cost and favorable recycling record, and the migration of electronics manufacturing industries to Indonesia from other Asian countries. Indonesia also boasts large and fast growing export positions in major box intensive industries such as clothing and textiles.

SAMPLE TEXT

Above-par gains are expected for masking tapes, the second largest major tape category in Indonesia. Indonesia's auto industry has fully recovered from the economic crisis of the late 1990s and is heading for continued growth over the coming decade. Rising personal income levels should enable the Indonesian consumer to more readily purchase an automobile. In the construction sector, the other major market for paint masking tapes, growth will be spurred by ongoing industrialization activity, as well as reconstruction efforts prompted by the devastating tsunami that hit the country in December 2004 and a major earthquake that struck the island of Java -- home to well over half of Indonesia's total population and one of the most densely populated areas in the world -- in May 2006. An estimated 115,000 housing units and numerous commercial facilities were destroyed by the tsunami, and more than 135,000 homes were destroyed by the May 2006 earthquake.

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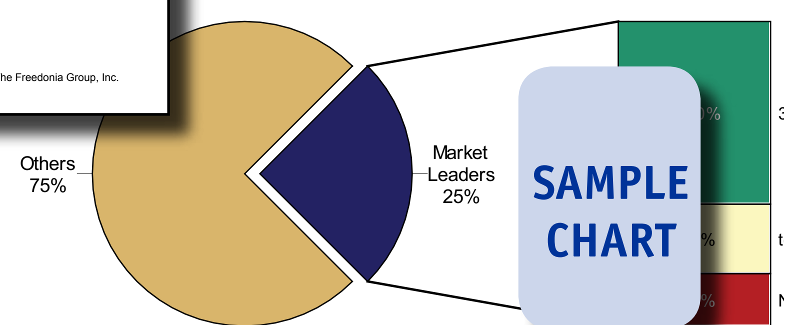
CHART VIII-1

RESSURE SENSITIVE TAPE MARKET SHARE, 2005 ($20.5 billion)



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Sample Profile, Table & Forecast

TABLE VI-10

INDONESIA -- PRESSURE SENSITIVE TAPE SALES BY TYPE & MATERIAL (million square meters)

Item	1995	2000	2005	2010	2015
Tape Sales	176				
By Type:					
Carton Sealing	116				
Masking	17				
Electrical & Electronic	15				
Double-Sided	11				
Medical	1				
Other	16				
By Material:					
Polypropylene	98				
PVC	22				
Paper	27				
Other	29				

SAMPLE TABLE

COMPANY PROFILES

Johnson & Johnson
One Johnson & Johnson Plaza
New Bru
732-524
http://w

Sales: $ n (2005)
Employ

SAMPLE PROFILE

Key Products: first aid, athletic and wound care tapes

Johnson & Johnson (J&J) is engaged in the manufacture and sale of a broad range of products in the health care industry and other fields. The Company is the world's largest and most comprehensive producer of health care products and operates through three major segments: Pharmaceutical, Consumer, and Medical Devices and Diagnostics.

The Company participates in the world tape industry through the Consumer segment and the Medical Devices and Diagnostics segment. Through these segments, J&J produces and markets first aid, athletic and wound care tapes.

J&J's Consumer segment had 2006 sales of $9.8 billion, of which the US accounted for $4.6 billion and other regions accounted for $5.2 billion. Through this segment, the Company makes and sells first aid and athletic tapes, as well as bandages and other wound care products. First aid tapes, which are sold through the FIRST AID product line, are made from paper, cloth or clear, latex-free plastic films. These tapes are coated with hypoallergenic adhesives to facilitate removal without skin irritation, and are available in breathable and waterproof varieties. J&J's COACH athletic tapes are used by trainers and sports medicine specialists to prevent sprains and protect against further injury. In the

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"Sales of pressure sensitive tapes in Indonesia are projected to advance at an annual rate of 5.5 percent through 2010, reaching 410 million square meters. While Indonesia's tape market grew smartly during the early-to-mid 1990s, the Asian financial crisis devastated the country's packaging sector beginning in 1998, resulting in a sharp drop in tape demand. Despite modest gains in the following years, ..."

--Section VI, pg. 172

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Other Studies

Stretch & Shrink Film

US stretch and shrink film demand will grow 4.7% annually through 2011, driven in part by retail trends favoring shrink-wrapped multipacks and pallet wrap. Stretch and shrink film will grow at a similar pace, with stretch film remaining the larger segment. The dominant resin, LDPE, offers the best growth opportunities. This study analyzes the $3.7 billion US stretch and shrink film industry, with forecasts for 2011 and 2016 by type, market and resin. It also evaluates market share and profiles major players.

#2254 .... 10/2007..................... $4400

World Labels

The global label market will grow 5.5% annually through 2011, driven by the diffusion of advanced logistics in developing areas and the development and penetration of smart radio frequency and value-added labels. The best gains will occur in emerging economies. This study analyzes the $67 billion world label industry, with forecasts for 2011 and 2016 by label material, application method, printing technology, world region and for 21 major countries. It also evaluates market share and profiles major players.

#2219 .... 06/2007..................... $5500

Meat, Poultry & Seafood Packaging

US demand for meat, poultry and seafood packaging will grow 4.2% annually through 2011. Smaller, more convenient packaging sizes and an increasing variety of items that are further processed will provide opportunities. Flexible packaging such as pouches and high barrier film will outpace rigid types. This study analyzes the $6.6 billion US meat, poultry and seafood packaging industry to 2011 and 2016 by material, product, application and market. It also details market share and profiles major players.

#2176 .... 03/2007..................... $4400

Dairy Packaging

US demand for dairy packaging will grow 4.1% annually through 2010. Gains will be driven by trends toward smaller containers and more food eaten or prepared away from home. Best growth is expected in cultured dairy products such as drinkable yogurt and in cream. Pouches and bottles will present the best opportunities by product. This study analyzes the $3.5 billion US dairy packaging industry to 2010 and 2015 by application, product and material. It also details market share and profiles major players.

#2105 .... 10/2006..................... $4400

Produce Packaging

US produce packaging demand will grow 4.6% per year through 2010. Growth will be fueled by rising demand for fresh-cut, ready-to-eat produce, which favors more value-added packaging than bulk produce. Corrugated boxes will remain the leading format while plastic containers and bags and liners will grow faster. The study analyzes the $3.4 billion US produce packaging industry to 2010 and 2015 by type, application and end user. It also evaluates company market share and profiles major competitors.

#2094 .... 08/2006..................... $4400

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