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World Labels

Industry Study with Forecasts for **2011 & 2016**

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INDUSTRY STRUCTURE

World Labels

Industry Study with Forecasts for ***2011 & 2016***

Gains in world label demand will be fueled by expansion of packaged consumer goods markets, the diffusion of advanced logistics and the penetration of high-tech, value-added labels.

Global market to grow 5.5% yearly through 2011

The global label market is forecast to advance at an annual pace of 5.5 percent to 42 billion square meters in 2011. Gains will be fueled by expansion of the world's packaged consumer goods markets -- specialty beverages, personal care products and medicinals offer especially good prospects. Also important will be the diffusion of advanced logistics and data processing systems throughout the developing world, and the development and penetration of technologically sophisticated, value-added labels that serve a range of functions. Examples include smart radio frequency and interactive packaging labels; authentication, tamper-evident and other security labels; and expanded content booklet labels.

Emerging economies to exhibit best gains

The best gains are expected in the world's emerging economies, which already account for over 40 percent of global label demand by area. Label markets in developing countries will enjoy robust growth, fueled by generally healthy economies, rising populations and expanding packaged consumer product sectors. China, which recently surpassed Japan as the world's second largest label market after the US, will continue to log double-digit demand growth. India and East European markets such as Poland and Russia also offer especially favorable prospects. Traditional packaging uses are more mature in the developed economies of North America, Western Europe and (especially) Japan, where labels also face stiff competition from direct printing. Still, opportunities exist in such areas as inventory control and product security.

Pressure sensitive, plastic labels among top prospects

Pressure sensitive labels, which surpassed wet glues as the leading label type in the late 1990s, will account for 55 percent of the global market by 2011. However, gains have slowed in recent years as growth markets such as wine and electronic security have matured and plastic sleeve, in-mold and wraparound labels have cut into pressure sensitive strongholds such as beverage packaging.

In terms of materials, plastic labels will continue to penetrate traditional paper applications, capturing nearly 30 percent of the world market by 2011. Technological, financial, aesthetic, performance and environmental considerations will all favor the use of plastic over paper substrates. Paper labels, by contrast, will be adversely affected by changes in the packaging mix; paper labels are widely used in slow growing segments like metal and glass packaging, whereas plastic labels are favored in the robust plastic bottle market.

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Sample Text, Table & Chart

ASIA/PACIFIC

Australia: Application Methods

Pressure sensitive labels accounted for 65 percent of Au label demand in 2006, well above the regional average. Furt are expected, with demand for self-adhesives slated to rise 6 annually t n 2011. PSA labels are expected to capture by the end of the next decade, as PSAs r ense of the traditional wet-glue types in n ly) wine packaging.

SAMPLE TEXT

Gair sthetic and performance qualities of self-ad as well as growth in variable informati cessing applications. While VIP pressure se competition from lower-cost direct printing technologies, printing quality and performance tend to favor the use of labels, since the type of substrate is consistent and controllable.

Pressure sensitives will also benefit from strong dema let/leaflet and other expanded content labels, especially in Australian pharmaceutical sector. These labels are well su conflicting regulatory pressures to provide additional produ tion without adding to packaging waste.

The best gains are expected for newer labeling metho ing in-mold labels (IMLs) and various types of sleeve and labels. Over the past decade, for example, Unilever Austra replaced the PSA labels on many of its laundry and cleanin with IMLs from local market leader Pemara Labels. Adva molds in these applications include

CHART III-1

WORLD LABEL DEMAND BY MATERIAL, 1996-2016
(billion square meters)

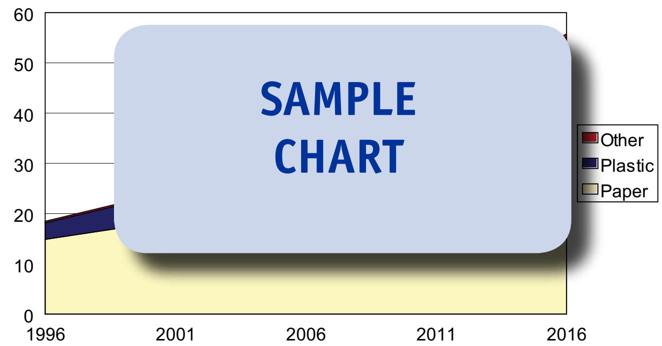

TABLE VII-1

ASIA/PACIFIC -- LABEL DEMAND
(million square meters)

Item	1996	2001	2006	2011	2016
Population (mil persons)	32				105
$ GDP/capita	44				930
Gross Domestic Product (bil 2005$)	14				870
sq m/capita					4.5
sq m/000$ GDP	0				.41
Label Demand	4				500
By Application Method:					
Pressure Sensitive	1				275
Wet Glued	2				795
Other					530
By Material:					
Paper	3				425
Plastic & Other	8				175

SAMPLE TABLE

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TABLE IX-2

SELECTED COOPERATIVE AGREEMENTS

Company	Type of Agreement	With Whom	Products Covered
Avery Dennison (US)	joint venture (Avery Dennison Zweckform Office Products Europe -- Germany)	Steinbe	e labels & cts
	production & resale	SATO Americ	ntification rinters
	joint venture (Kaygee -- Loparex, India)	private	se liners
	joint venture (Label Solutions Calidata SA Mexico)	Calidata	fication, roduct identification labels

SAMPLE TABLE

COMPANY PROFILES

Renaissance Mark
350 Southwood Court
Bowling Green, KY 42101
270-745-0829
http://www.ren-

Annual Sales: verify, 5/07)
Employment: 5/07)

Key Products: l-to-roll and in-mold labels

SAMPLE PROFILE

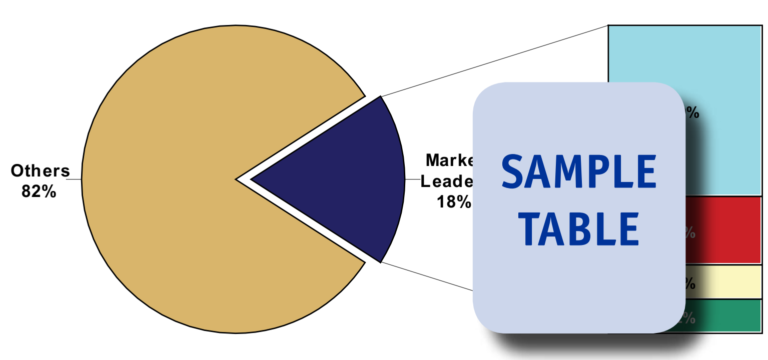
Renaissance Mark is a leading North American manufacturer of labels for the water, wine and spirits, food and beverage, and health and beauty aid industries. The privately held company is owned by Arsenal Capital Partners (New York, New York), a private equity firm.

The Company produces a wide range of standard, promotional and other types of labels made from paper, clear and opaque film, foil, and metallized and laminated substrates. Printing processes utilized in Renaissance Mark's labels include web, offset, flexographic, gravure and silkscreen methods. Among the finishing techniques utilized by the Company are die cutting, embossing, hot stamping and bronzing.

Standard labels include pressure sensitive, glue-applied and roll-to-roll types. Among the promotional labels made by Renaiss Mark are PEEL'N RESEAL labels, which are designed to inc surface area by up to three times that of regular labels, thereb nating the need for secondary packaging inserts. These two-p feature three printable surfaces and a hinged retaining edge. RESEAL labels are available in paper-to-paper, paper-to-orie propylene (OPP) and OPP-to-OPP constructions.

CHART IX-1

WORLD LABEL STOCK MARKET SHARE, 2006 ($31 billion)



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Other Studies

Active & Intelligent Packaging

US demand for active and intelligent packaging will grow 13% yearly through 2011. Intelligent packaging will grow the fastest, driven by the emergence of lower cost time-temperature indicator (TTI) labels. Active packaging will be paced by gas scavengers. Pharmaceuticals, beverages and food will offer the best market prospects. This study analyzes the US active and intelligent packaging industry, with forecasts for 2011 and 2016 by product and market. It also details market share and profiles major players.

#2236 .... 08/2007..................... $4400

World Pharmaceutical Packaging

World pharmaceutical packaging demand will grow 5.9% annually through 2011. Western Europe, the US and Japan will continue to account for most demand while China, India and Brazil lead gains. Prefillable inhalers and syringes will grow the fastest while plastic bottles will remain dominant. This study analyzes the $25.8 billion world drug packaging industry, with forecasts for 2011 and 2016 by material, product, world region and for 30 countries. It also details market share and profiles major players.

#2213 .... 07/2007..................... $5800

Beverage Containers in China

Demand for beverage containers in China will grow 8.9% per annum through 2010. Plastic will remain the dominant material in unit terms while paperboard will grow the fastest. Milk will stay the largest market and be one of the fastest growing, with fruit beverages posting the fasted gains. This study analyzes the ¥60.5 billion beverage container industry in China, with forecasts for 2010 and 2015 by market and material. The study also evaluates company market share and profiles leading industry participants.

#2183 .... 05/2007..................... $4900

World Pressure Sensitive Tapes

The global market for pressure sensitive adhesive (PSA) tapes will grow 4.7% yearly through 2010. Demand will benefit from a firming global economy and advantages over other joining, sealing and bonding methods. Corrugated carton sealing tapes will remain dominant while technical and specialty tapes grow the fastest. This study analyzes the $20.5 billion world PSA tape industry to 2010 and 2015 by type, material, world region and for 23 countries. It also evaluates market share and profiles 42 players.

#2169 .... 03/2007..................... $5500

Paper Versus Plastic in Packaging

In eighteen selected markets where plastic and paper compete as packaging materials, plastic will increase its market share to 53% by 2010. The fastest gains for plastic will occur in soy and other nondairy beverages and pet food applications, followed by frozen food, fruit beverages, detergents and single-serving milk bottles. This study analyzes the 24 billion pound competitive plastic and paper packaging industry to 2010 and 2015 by product and market. It also details company market share and profiles major players.

#2133 .... 12/2006..................... $4400

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