photo courtesy of CCL Label

Labels

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

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Best opportunities are anticipated for the dominant pressure sensitive label segment, although other types such as stretch sleeve and heat-shrink labels will post faster advances.

US shipments to rise 5.1% annually through 2011

US label shipments are forecast to increase 5.1 percent annually to $18.3 billion in 2011. Best opportunities are anticipated for the pressure sensitive segment, which accounts for the majority of label shipments. However, pressure sensitives will face increased competition from other application methods such as stretch sleeve and heat-shrink labels, which will post more rapid advances. Gains in the stretch and shrink segment will be driven by increased use in the large beverage packaging industry. Advances in resin technologies will also support growth. These include the development of environmentally friendly resins such as polylactic acid, and the popularity of 360 degree graphics, unique container contouring and the "no-label look." Overall volume growth will remain steady, although label prices are expected to moderate from a high 2006 base, thus limiting value gains to some extent.

US Label Shipments
($18.3 billion, 2011)

Plastic stock materials to continue gains on paper

Paper will continue to dominate the label industry, but will slowly lose market share as the use of plastic stock materials expands rapidly. Advances will be based on the aesthetic and performance advantages of plastic labels; the growing use of plastic packaging; and the popularity of labeling methods such as pressure sensitive, in-mold, thermal transfer and shrink, which heavily rely on plastic substrates. A healthy pace of new product development, including the more widespread commercialization of environmentally friendly substrates, will also buoy demand for plastics. Oriented polypropylene will exhibit the fastest growth among the major label resins, further supplanting polyvinyl chloride.

Primary packaging to stay largest market; secondary packaging to lead gains

Primary packaging will remain the major market for labels through 2011, although demand for labels in secondary applications will post the fastest gains overall. A growing interest in the use of labels as a tool to create a strong brand identity in a crowded consumer product marketplace will provide favorable opportunities for labels in the primary packaging industry, as will a rising interest in labels as a means of serving value-added functions such as enhancing security and providing expanded product information. Going forward, secondary labeling will benefit from continued demand for bar coding labels in addition to the utilization of radio frequency identification (RFID) and electronic article surveillance (EAS).

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Sample Text, Table & Chart

TABLE IV-1

RAW MATERIAL USE IN LABELS
(million pounds)

Item	1996	2001	2006	2011	2016
Label Shipments (mil square meters)					
lb/square meter					
Raw Material Use in Labels					
Paper					
Plastic Films:					
Polypropylene					
PVC					
Other					
Adhesives					
Inks					
Other					

SAMPLE TABLE

APPLICATION METHODS

Stretch Sleeves

Shipments of stretch sleeve labels are projected to advan cent per year to $ th will slow fron pace experienced he early part of partially due to d bottle production importantly, gain nse competition native label types viding 360 degr such as shrink sl n-shrink wraparo ever, the favorable teristics of stretch will continue to promote opportunities for this label type thro

SAMPLE TEXT

A favorable outlook for stretch sleeves will also be propelled by technological advances rendering this type of label more attractive as a marketing medium. Examples include scratch-off sections and "magic windows," thermochromatic printing, backside printing of coupons and other promotionals, edge-to-edge "full bleed" printing, and the use of specialty substrates (e.g., metallized and transparent types) and inks (e.g., chemical resistant, ink jet and high gloss).

Attributes -- Stretch sleeves are continuous cylindrical labels, which are slipped over and around plastic containers. No glue or heat is required to hold them in place due to their elasticity, reducing labor and material costs. Other advantages include moisture resistance and 360 degree graphics.

Stretch sleeve labels may be applied either manually or automatically, although both approaches tend to be quite slow relative to other label application methods, topping out at 700 to 800 units per minute. They can easily be manually removed prior to recycling or refilling of the container, and the recovered material is of a high purity, providing environmental benefits vis-a-vis all other labeling systems. Stretch sleeve labels are most commonly printed via flexography.

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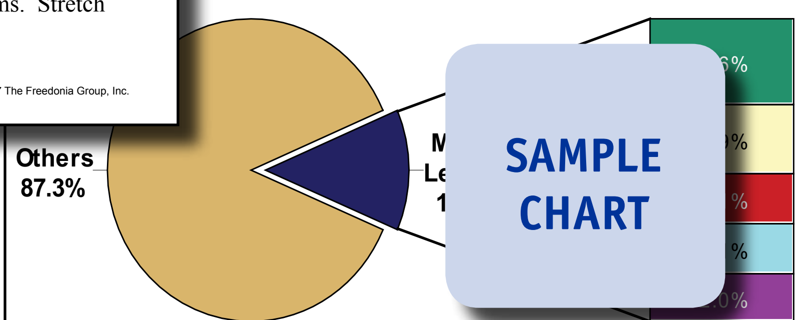
CHART IX-2

FINISHED LABEL MARKET SHARE, 2006
($14.0 billion)



* includes revenues from Renaissance Mark, acquired by Fort Dearborn in 2007

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Sample Profile, Table & Forecast

TABLE VIII-2

PRIMARY PACKAGING LABEL DEMAND BY MARKET
(million dollars)

Item	1996	2001	2006	2011	2016
Nondurable Goods Shipments (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ labels/000$ nondurables	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Primary Packaging Label Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Food Processing	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Beverages	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Pharmaceuticals	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cosmetics & Toiletries	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% primary	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Label Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

SAMPLE TABLE

COMPANY PROFILES

Curtis Fine Papers
Main Street, Guardbridge
St. Andrews Fife
Scotland
United K
44-1334-
http://wv

Sales: $
Employr

Key Proc

SAMPLE PROFILE

Curtis Fine Papers is a manufacturer and supplier of uncoated fine papers. The Company divides its operations into four main divisions: Curtis Graphical; Curtis Convert; Curtis Secure; and Curtis Publishing.

The Company engages in the US labels industry through the Curtis Convert and Curtis Secure divisions. The Curtis Convert division specializes in the production papers that can be altered by converters for applications including wine labels, luxury packaging, greeting cards, mount boards, swing tickets, carrier bags, map paper, social stationary and drawing papers. Curtis Convert offers both stock and custom label paper options. The products feature wet-strength, wet-glue and self-adhesive properties and also offer efficient printability. The division's range of printing and finishing capabilities include hot foil blocking, embossing, debossing, bronzing, ultraviolet varnishing, die cutting and lithographic processes. In August 2006, the Curtis Convert division expanded its range of label papers with the introduction of ARISTOCRAT uncoated papers, which are made in various textures and shades for the wine and spirit market. ARISTOCRAT label papers include self-adhesive, recycled and watermarked types.

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"**Food Processing** -- Label demand in food processing is projected to rise 5.6 percent per year to $4.3 billion in 2011. The food industry will continue to comprise the largest single primary packaging label market, accounting for more than 50 percent of primary packaging label demand in 2011, supported by growth in processed food output and the popularity of smaller serving sizes."

--Section VIII, pg. 168

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Other Studies

Converted Flexible Packaging

US converted flexible packaging demand will grow 4.2% annually through 2011. Gains will be driven in part by advantages over most rigid packaging and by developments in breathable and self-venting films and resealable features. Pouches will be the fastest growing type while bags remain the largest segment. This study analyzes the $13.4 billion US converted flexible packaging industry, with forecasts for 2011 and 2016 by material, product and market. It also evaluates market share and profiles major players.

#2275 .... 11/2007..................... $4600

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

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 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

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 for 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

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