World Pressure Sensitive Tapes

Industry Study with Forecasts for **2012 & 2017**

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INDUSTRY STRUCTURE

While the key carton sealing and masking tape segments will decline relative to the 2002-2007 period, other types such as double-sided and medical tapes will perform more favorably.

Global demand to rise 5% annually through 2012

World demand for pressure sensitive adhesive (PSA, self-adhesive) tapes is forecast to expand 5.0 percent per year through 2012, reaching 36 billion square meters. In value terms, tape sales will rise a slower 3.3 percent annually to $30 billion, as raw material costs stabilize or decline following the 2004-2007 run-up. Projected growth in tape production will generate demand for around 3.2 million metric tons of raw materials in 2012, including adhesives and various backing substrates.

Polypropylene to exhibit best gains in tape materials

The best gains among the major tape backing materials are expected for various polypropylene products and fairly newer materials that are in limited use, such as foam. Slowest growth is expected for PVC tapes, which will suffer from maturity in electrical insulation applications and loss of share to oriented polypropylene (OPP) in the packaging sector. Paper tapes will also trail the market average, held down by maturity in the bedrock masking tape segment.

Corrugated carton sealing tapes will remain by far the most widely used tape type, accounting for over two-thirds of demand in 2012. Nevertheless, gains in this market will decline relative to the performance of the 2002-2007 period due to a deceleration in growth for global food and beverage shipping.

World Tape Demand, 2012
(35.9 billion square meters)

Masking tapes, the second largest product type, will register the slowest gains, with growth hindered by decelerating building construction spending and shifts toward less tape-intensive industrial coating technologies. Among the other tape types, the best opportunities exist for double-sided tapes, with medical and other specialty tapes also performing favorably.

China, India, Eastern Europe enjoy favorable prospects

PSA tape sales in China, India, and Eastern Europe will enjoy particularly favorable prospects through 2012. China is expected to expand its share of the world tape market from 24 percent in 2007 to 29 percent in 2012, with gains driven by strong (albeit decelerating) economic growth and the massive tape requirements of China's vast and continually expanding export-oriented manufacturing complex.

The US accounts for 21 percent of global demand, although its share of the world market will continue to decline due to decelerating economic growth and mature key tape consuming industries in the country such as food and beverages, and building construction. The same can be said for most other developed countries in Western Europe and the Asia/Pacific regions, where annual tape demand growth will significantly lag the global average through 2012.

World Pressure Sensitive Tapes

Industry Study with Forecasts for ***2012 & 2017***

Sample Text, Table & Chart

ASIA/PACIFIC

Thailand: Market Trends

Sales of pressure sensitive tapes in Thailand are pr
a ... ar through 2012 to approach
... g tapes account for a higher
... most Asian countries -- 78 pe
... t from the strong pace set du
... y global standards. Advanc
... n of competitive carton sea
v ... emand for corrugated packa
Those include strong -- albeit slowing -- manufacturing
as expansion of Thailand's export sector. Manufacturin
as electronics continue to migrate to Thailand from othe
with higher labor costs. Thailand also ranks among the
exporters of box intensive products like food and clothing. Natural rubber based adhesives will continue to dominate the product mix, due in part to Thailand's abundant rubber supplies. The country is the world's largest natural rubber producer, accounting for over one-third of global production.

SAMPLE TEXT

Masking tapes will log above average gains, and will perform better here than in most countries. Increases will be supported by strong growth in building construction activity through 2012 as external investment continues to flow into the nation. However, construction gains through 2009 and possibly 2010 will be constricted to a significant degree by the limited availability of overseas funding for expansion projects because of the current global economic crisis. Prospects will also remain favorable in motor vehicles, the other key masking tape market.

Of the remaining tape types, double-sided and various specialty tapes hold strongest prospects. Tapes will continue to supplant alternative joining and sealing techniques in a range of industrial applications and will benefit from a healthy pace of product development activity

TABLE VI-18

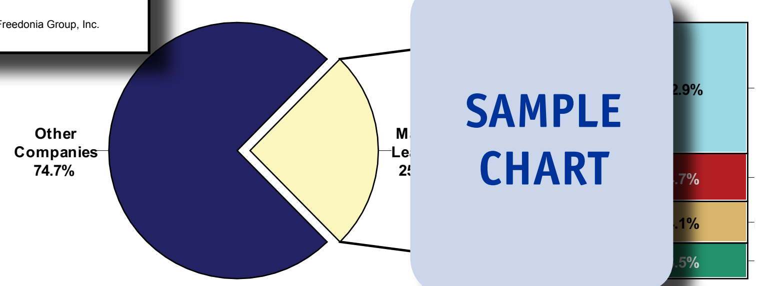
THAILAND - PRESSURE SENSITIVE TAPE SALES BY TYPE & MATERIAL (million square meters)

Item	1997	2002	2007	2012	2017
Tape Sales					
By Type:					
Carton Sealing					
Masking					
Medical					
Double-Sided					
Electrical & Electronic					
Other					
By Material:					
Polypropylene					
PVC					
Paper					
Other					85

SAMPLE TABLE

CHART VIII-1

...RESSURE SENSITIVE TAPE MARKET SHARE, 2007 ($25.5 billion)



SAMPLE CHART

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Industry Study with Forecasts for ***2012 & 2017***

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Sample Profile, Table & Forecast

TABLE VI-17

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

Item	1997	2002	2007	2012	2017
Population (mil persons)	5				8.4
$ GDP/capita	6				00
Gross Domestic Product (bil 2006$)					14
square meters/capita					3
square meters/mil $ GDP					17
Tape Sales					02
net exports					22
Tape Shipments	95	105	140	200	280

SAMPLE TABLE

COMPANY PROFILES

Covidien Limited
131 Front Street
Hamilton HM 12
Bermuda
441-298-2480
http://www.covidien.com

Sales: $9 2008)
Geograp US 55%, Other
America
Employ 2008)

Key Proc

SAMPLE PROFILE

Cov medical devices and supplies, diagnostic imaging agents, pharmaceuticals and other health care products for use in clinical and home settings. The Company, formerly Tyco Healthcare Limited, was separated from Tyco International Limited (Bermuda) in June 2007. Covidien operates in four continuing segments: Medical Devices, Medical Supplies, Imaging Solutions and Pharmaceutical Products. In April 2008, the Company sold a former fifth segment, Retail Products, which had FY 2007 sales of $744 million, to First Quality Enterprises Incorporated (Great Neck, New York).

Covidien is active in the world tape industry through the Medical Supplies segment, which recorded sales of $920 million in FY 2008. The segment includes the Company's operations for the manufacture and sale of KENDALL medical products, which include medical and athletic tapes. Medical tapes are sold through the TENDERSKIN, CURASILK, CURITY, WET-PRUF and TENDERFIX product lines. These tapes consist of paper, cloth or plastic films lined on one side

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"Thailand used 308 million square meters of pressure sensitive tapes in 2007. Through 2012, tape sales in the country are projected to rise 5.2 percent per year 397 million square meters. Thailand's trade deficit in pressure sensitive tapes will widen to 200 million square meters in 2012, with domestic production expected to reach 200 million square meters in 2012. Thailand imports self-adhesive tapes primarily from ..."

--Section VI, pg. 179-80

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Other Studies

Green Packaging

This study analyzes the US market for environmentally friendly and sustainable packaging. It presents historical recycled content and reusable packaging demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by material (paper, metal, glass, plastic, biodegradable plastic) and market (e.g., food, beverage, consumer products, shipping, foodservice). The study also discusses source reduction and recycling activity, competitive strategies and merger and acquisition trends, and profiles industry competitors.

#2471 .... 03/2009..................... $4700

Paper vs Plastic in Packaging

US demand for plastic packaging will continue to outpace paper in markets where they compete, albeit more slowly as applications mature. The fastest market share increases for plastic will occur in pet food and soy beverage packaging, followed by protective packaging, foodservice and dairy products, among others. This study analyzes selected competitive markets in the US for paper and plastic packaging, with forecasts for 2012 and 2017 by material and market. It also discusses market leaders and profiles industry players.

#2443 .... 01/2009..................... $4700

Plastic Film

US demand for plastic film will reach 16 billion pounds in 2012. Gains will reflect film's cost, performance and source reduction advantages over rigid packaging, as well as opportunities in products such as pouches and modified atmosphere packaging. LDPE will remain the top film, while the lower volume degradable plastic segment leads gains. This study analyzes the $25.4 billion US plastic film industry, with forecasts for 2012 and 2017 by type, application and market. It also evaluates market share and profiles industry players.

#2371 .... 07/2008..................... $4700

Labels

US label shipments will grow 5.1% annually through 2011. Best opportunities are anticipated for the dominant pressure sensitive segment. However, stretch sleeve and heat shrink labels will grow the fastest. Paper will remain the largest stock material but will continue losing market share to plastic. This study analyzes the $14.3 billion US label industry, with forecasts for 2011 and 2016 by material, application method, printing technology and function. It also details market share and profiles leading producers.

#2268 .... 12/2007..................... $4500

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

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