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World Labels

Industry Study with Forecasts for **2013 & 2018**

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INDUSTRY STRUCTURE

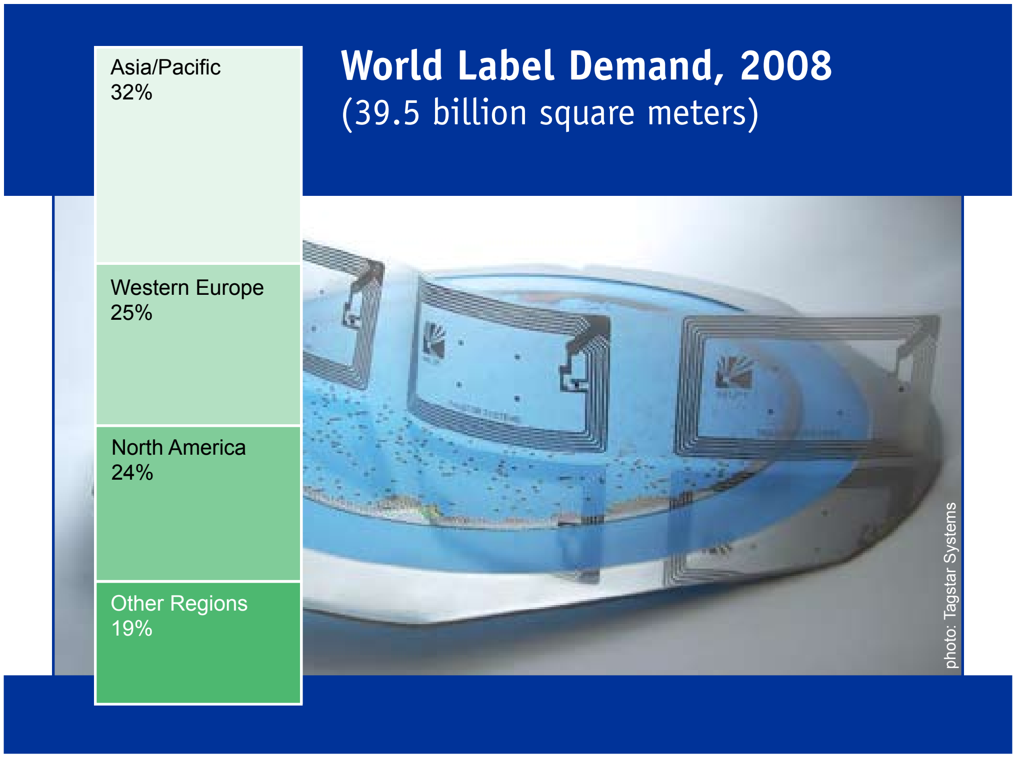
Label products with strong growth will include counterfeit deterrence labels, retail sector RFIDs that allow labels to manage inventory and convey information, and tamper-evident labels.

Global demand to rise 4.3% yearly through 2013

World demand for labels is projected to expand 4.3 percent per year through 2013 to 49 billion square meters. Value demand is expected to grow 5.3 percent per year to $105 billion. The pressure sensitive segment will continue to see above-average gains, accounting for almost 55 percent of global label demand by 2013. In contrast, wet glued products will not fare as well, with demand even declining in many developed food and beverage markets where plastic containers continue to replace traditional steel cans and glass bottles and jars that utilize wet glued products. Other less significant technologies with favorable outlooks include shrink sleeve, wrap-around film and in-mold labels. Through 2013, plastic labels will continue to register much faster gains than paper labels, which are largely used in wet glued applications.

Asia/Pacific region to expand market share

The Asia/Pacific region will expand its share of the world label market from 32 percent in 2008 to 36 percent in 2013. China and India will account for much of this increase, while Japan will see weak growth. The US will see below-average gains through 2013, but remain strong relative to other developed markets. Western Europe will see a noticeable deceleration in its label market growth, with some highly intensive users of labels in the region such as Ireland, Scandinavia and the United Kingdom expected to see outright declines. Latin America, Eastern Europe and the Africa/Mideast region, which combined accounted for less than 20 percent of global label demand in 2008, will all see above-average gains through 2013.



Pharmaceutical market to register strong gains

Among the various market segments, the pharmaceutical sector will register particularly strong gains, aided by improving health care in the developing world and an aging population in the developed world. The food and beverage sectors will see weaker gains as a result of market maturity and stagnant population growth in the developed world, combined with the increasing penetration of cans, pouches and other packaging media that utilize printed product descriptions rather than labels. Label products with strong growth will include counterfeit deterrence labels, retail sector radio frequency identification tags (RFIDs) that allow labels to assume inventory control and management as well as convey information, and tamper-evident labels. Smart labels in general will see healthy growth in safety, security and surveillance applications in areas as diverse as patient monitoring in hospitals, electronic article surveillance in libraries, and next generation military applications.

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Sample Text, Table & Chart

TABLE VI-7

INDIA -- LABEL DEMAND BY APPLICATION METHOD & MATERIAL
(million square meters)

Item	1998	2003	2008	2013	2018
Population (mil persons)					
$ GDP/capita					
Gross Domestic Product (bil 2007$)					
sq m label/capita					
sq m label/000$ GDP					
Label Demand					
By Application Method:					
Pressure Sensitive					
Wet Glued					
Other					
By Material:					
Paper					
Plastic & Other					

SAMPLE TABLE

ASIA/PACIFIC

India: Demand by Application Method & Material

In 2008, labe … illion squar… representing per … meters, we… world average of … evertheless… for labels in India … 2 percent p… through 2013 to 2… will be aide… and growing mid… ple, whose… income will contin… dustrial mark… over, the currently highly fragmented and disorganized retail… the country will start to see increasing foreign investment by… international retail chains such as Carrefour (France), Metro… Tesco (UK) and Wal-Mart (US) in collaboration with local c… assuming the Indian government opens up the domestic retai… some extent as expected. This will have a particularly favora… on label demand in retail applications (e.g., supermarket disp… smart labels).

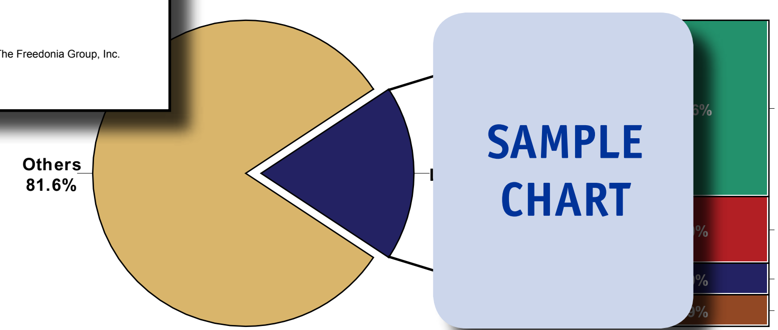
SAMPLE TEXT

In volume terms, the Indian market is still dominated by wet glued labels, although pressure sensitive labels will register significantly faster gains through 2013 and become the more important product type. On a value basis, pressure sensitive labels are already more significant than wet glued varieties. Plastic film label sales will outpace paper label sales through 2013 due to a favorable outlook for pressure sensitive, shrink sleeve and wraparound film labels.

Offset printing is the most widely used technology in India's label industry. Gravure is still also significant and registering positive growth, which is not common in most countries. In recent years, strongest growth has come from flexo and combination presses. There is an ongoing shift in industry preference from sheetfed offset and narow web letterpress to narrow web flexo and combination label presses.

CHART VIII-1

…RLD LABEL STOCK MARKET SHARE, 2008
($35 billion)



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Sample Profile, Table & Forecast

TABLE VI-8

INDIA -- LABEL DEMAND BY MARKET
(million square meters)

Item	1998	2003	2008	2013	2018
Label Demand					
Food					
Beverages					
Pharmaceuticals					
Household & Industrial Chemicals					
Durable Goods					
Other					

SAMPLE TABLE

COMPANY PROFILES

HERMA GmbH
Fabrikstrasse 16
70794 Filderstadt
Germany
49-711-77020
http://www.he

Gross Sales: ... ny)
Employment:

Key Products: ... for labeling applications

SAMPLE PROFILE

HERMA, one of Europe's leading specialists in self-adhesive technologies, develops and produces labeling systems and self-adhesive products. The privately held company operates through three divisions: Labels, Self-Adhesive Materials and Labelling Machines.

The Company participates in the world label industry primarily through the Labels and Self-Adhesive Materials divisions. The Labels division manufactures a broad array of products for the office/consumer and industrial markets. For example, among the division's labels for office and consumer applications are inkjet, laser, photocopy, franking machine, text, seal-type, typewriter, multipurpose, compact disc and caution labels. These labels utilize a range of face materials, including standard paper, glossy paper, film and artificial silk substrates. In January 2009, the division introduced natural white labels made entirely from recycled paper. The division's consumer label products also include decorative stickers and self-adhesive window decorations. HERMA's industrial label products are designed for use in the retail trade, logistics, automotive, pharmaceutical, chemical, electronics and other markets. For example, among the Company's labels for retail trade applications are product identification and organization labels, including pricing, coupon, duplex, rating-plate and HERMADUOPART

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"Gains in label sales to India's pharmaceuticals sector will be bolstered by the country's position as a leading exporter of lower cost generic drugs. A number of local companies, such as Cipla, Dr. Reddy's Laboratories and Ranbaxy Laboratories, have become globally renowned. Indian generic drug manufacturers now produce low cost AIDS drugs for over 50 percent of the one million or so HIV patients taking antiretroviral medicines in developing countries, bolstering the domestic market for pharmaceutical packaging and related labeling products."
--Section VI, pg. 174

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Other Studies

Active & Intelligent Packaging

This US active and intelligent packaging industry is analyzed in this study. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by product (e.g., gas scavengers, moisture control, antimicrobial, flavor and fragrance control, self-venting and air-releasing, susceptor, time-temperature indicator, pharmaceutical diagnostic, RFID-enabled) and market (e.g., food, beverages, drugs, electronics). The study also considers market environment factors, details market share and profiles industry players.

#2515 .... 07/2009..................... $4700

Green Packaging

US demand for packaging designed to lessen environmental impact is projected to grow 3.4% annually through 2013. Biodegradable plastic packaging and recycled content plastic packaging will grow the fastest. Reusable plastic containers and intermediate bulk containers will pace gains in the reusable packaging segment. This study analyzes the $37.2 billion US green packaging industry, with forecasts for 2013 and 2018 by type and market. It also evaluates company market share and profiles industry players.

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

World Pressure Sensitive Tapes

World demand for pressure sensitive adhesive (PSA) tapes is projected to grow 5% yearly through 2012. Carton sealing tapes will remain dominant, while double-sided and specialty tapes will grow the fastest. Sales in China, India and Eastern Europe will lead gains, while growth in developed countries will be below average. This study analyzes the $26 billion world PSA tape industry, with forecasts for 2012 and 2017 by type, material, world region and for 22 countries. It also details market share and profiles industry players.

#2451 .... 02/2009..................... $5800

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

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