Labels

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

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Labels

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More rapid growth will be achieved by heat-shrink, stretch sleeve and in-mold labels as these application methods provide increasingly intense competition for pressure sensitives.

US shipments to advance 4.5% yearly through 2013

US label shipments are projected to advance at a 4.5 percent annual rate to $19.2 billion in 2013. More than three-quarters of total gains will be attributable to the pressure sensitive segment, which will continue to dominate label shipments. However, more rapid growth will be achieved by heat-shrink, stretch sleeve and in-mold labels as these application methods provide increasingly intense competition for pressure sensitives. Heat-shrink labels are forecast to outperform all other major label types, benefitting from their attractive 360 degree aesthetics, broad promotional area and capacity to provide tamper evidence, as well as their increasing cost effectiveness and ability to form-fit contoured containers.

Plastic label stock to outpace paper stock material

Despite losing market share to plastic, paper will continue to be the most widely used stock material in the label industry. Paper will advance strongly in absolute terms, but will be significantly outpaced by plastic, which will account for more than one-quarter of label shipments by 2013. Increased use of plastic stock materials will be supported by the shift toward plastic packaging, as well as the material's aesthetic and performance advantages over paper. The popularity of pressure sensitive, heat-shrink and stretch sleeve, in-mold, and thermal transfer labels will also bode well for plastic, as this material is heavily utilized in each of these labeling methods. Plastic label shipments will be further boosted by the continued development of new products, including the increasingly widespread commercialization of environmentally friendly substrates such as polylactic acid. Among plastic label resins, oriented polypropylene will continue to exhibit favorable growth, while polyvinyl chloride will lose market share to other plastic substrates with lower perceived environmental and health risks.

US Label Shipments, 2008
($15.4 billion)

Digitally printed labels to be fastest growing

The vast majority of US label shipments are printed in some manner before sale to the final user. Flexography is the most common method for printing labels, owing to its widespread use in the large pressure sensitive segment. Additional printing technologies include lithography, screen, letterpress, gravure and digital. Increasingly, different printing processes are being combined in order to achieve superior label graphics. This will support gains in screen and digital technologies in particular. Shipments of digitally printed labels are forecast to expand at the most rapid rate, nearly doubling by 2013. Growth will be fueled by trends favoring shorter label runs and mass customization -- a popular marketing tool that capitalizes on the advantages offered by digital printing technologies.

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Sample Text, Table & Chart

TABLE V-4

STRETCH SLEEVE & HEAT-SHRINK LABEL SHIPMENTS BY TYPE & MATERIAL (million dollars)

Item	1998	2003	2008	2013	2018
Plastic Bottle Production (bil units)					0
$ labels/000 bottles					3
Stretch Sleeve & Heat-Shrink Labels					0
By Type:					
Stretch Sleeve					0
Heat-Shrink					0
By Material:					
Polyethylene					5
Polyvinyl Chloride					0
Other Plastics					5
% stretch sleeve & heat-shrink					5
Label Shipments	8				0

SAMPLE TABLE

MARKETS

Flexography

Flexographic printed label shipments are forecast to exp an above-average annual pac llion i Flexographic printing techn el in their cost efficiency and con s we turnaround capabilities. Fle sure adhesive (PSA) and sleeve l ances ongoing improvements in e er-ba UV-curable flexo inks, and fl on in tion presses. On the other hand, gains will be restrained by c competition from the fast growing digital print industry, part shorter product runs. Furthermore, intense competition will growth as it places downward pressure on pricing. Neverthe is projected to increase its share of total printed label shipme percent in 2013.

SAMPLE TEXT

Advantages of flexography include the ability to print on many different substrates, versatility in terms of run lengths, low cost, good color saturation, relatively low labor requirements for print operation and simplicity of use. Moreover, technological advances over the past decade or so have significantly improved flexo print quality, mitigating the primary advantage of other printing techniques over flexography and allowing it to supplant them in many applications. While the quality of all of the major printing methods has been enhanced by improvements in inks and other technological innovations since the mid-1980s, such developments have been perhaps the most pronounced for flexography. The development of water-based flexo inks, for example, has positioned flexo as one of the most environmentally favorable printing techniques. Additionally, flexography can also be used to print lenticular labels, which convey depth and motion through the use of tiny lenses. Through the use of flexographic technologies, lenticular printing -- which has traditionally been too costly for long print runs -- may become more cost effective

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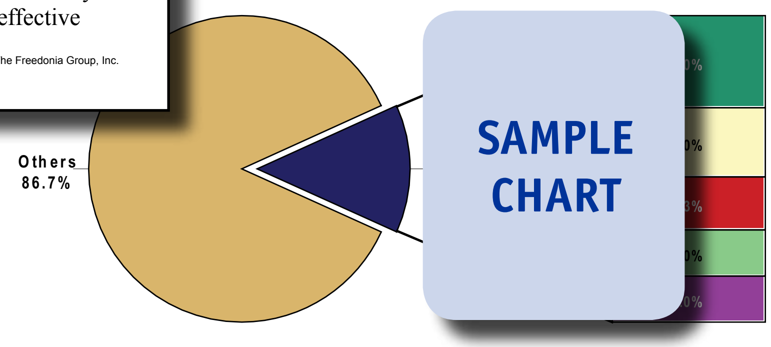
CHART IX-2

FINISHED LABEL MARKET SHARE, 2008 ($15.1 billion)



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Sample Profile, Table & Forecast

TABLE VIII-2

PRIMARY PACKAGING LABEL DEMAND BY MARKET
(million dollars)

Item	1998	2003	2008	2013	2018
Nondurable Goods Shipments (bil $)					
$ labels/000$ nondurables					
Primary Packaging Label Demand					
Food Processing					
Beverages					
Cosmetics & Toiletries					
Pharmaceuticals					
Other					
% primary packaging					
Label Demand					

SAMPLE TABLE

COMPANY PROFILES

Spear USA
5510 Courseview Drive
Mason, OH 45040
513-459-1100
http://www.spearinc.com

Annual S 7/09)
Employ

Key Pro et-glue applied
paper lab

SAMPLE PROFILE

Spe ucers of pressure sensitive and decorative systems. Th and sales operations in North America, the United Kingdom (UK) and South Africa. Spear USA is owned by Spear Group Holdings Limited (UK).

The Company designs, manufactures and sells pressure sensitive film and wet-glue applied paper labels used in packaging beverages, food and personal care products. In general, Spear USA's engineered labels are designed to withstand pasteurization, hot filling, retort and ice chests in order to permit label applications at all stages of the distribution process. Specific film products include THERMOWASH pressure sensitive labels, which are designed to wash off returnable bottles during the cleaning process; and PEEL 'N RE-SEAL pressure sensitive labels, which function as re-sealable openings. Paper labels made with Spear USA include PRECISION PAPER wet-glue applied types for food and beverage applications. These labels are marketed for use by high-volume branded products requiring wide-web rotogravure printing.

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"Beverage label demand is projected to rise 5.3 percent per year to $1.3 billion in 2013. A fairly fast pace of new product introductions will aid growth, as labels frequently promote the brand image of a new product. Additionally, advances will be boosted by an ongoing shift in the product mix favoring higher value labels, such as clear heat-shrink, full-body labels, and clear pressure sensitive labels. Further supporting increases will be ..."
--Section VIII, pg. 175

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Other Studies

Converted Flexible Packaging

This study analyzes the US converted flexible packaging industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by material (e.g., plastic film, paper, aluminum foil), product (e.g., bags, pouches), food packaging market (e.g., meats, baked goods, snack foods) and nonfood packaging market (e.g., pharmaceuticals, paper and textile products, chemicals). The study also considers market environment factors, evaluates company market share and profiles industry players.

#2558 .... 09/2009..................... $4900

Active & Intelligent Packaging

US demand for active and intelligent packaging will climb 8.3% yearly through 2013, driven in part by food safety concerns and losses in perishables. Intelligent packaging will grow the fastest, propelled by time-temperature indicators and other products that offer product differentiation, traceability and interactive features. This study analyzes the $1.3 billion US active and intelligent packaging industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

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

World Labels

Global label demand will grow 4.3% yearly through 2013. The dominant pressure sensitive segment will continue to see above-average gains. The Asia/Pacific region will expand market share, driven by China and India. The US will remain strong among developed markets. This study analyzes the 39.5 billion square meter world label industry, with forecasts for 2013 and 2018 by application method, material, printing technology, market, world region and for 19 countries. It also evaluates market share and profiles industry players.

#2499 .... 06/2009..................... $5800

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

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