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Labels

US Industry Study with Forecasts for **2015 & 2020**

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US Industry Study with Forecasts for ***2015 & 2020***

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MARKET ENVIRONMENT

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FUNCTIONS

INDUSTRY STRUCTURE

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Although pressure sensitive labels will expand at a healthy rate, they will continue to face growing competition from alternative methods such as stretch sleeve, heat-shrink and in-mold labels.

US shipments to rise 4.8% annually through 2015

US label shipments are forecast to rise 4.8 percent annually to $20 billion in 2015. The pressure sensitive segment will continue to dominate output, accounting for more than 70 percent of the total. Although pressure sensitive labels will expand at a healthy rate, they will continue to face growing competition from alternative labeling methods such as stretch sleeve, heat-shrink and in-mold labels. Among these, heat-shrink labels are projected to advance at the fastest rate through 2015, with gains attributable to their ability to form-fit contoured containers, providing 360-degree graphics and a broad promotional area which enable consumer products to stand out on crowded store shelves.

Paper to continue losing market share to plastic

Paper will remain by far the leading stock material in the label industry for the foreseeable future. However, it will continue to lose market share to plastic, which will account for more than one-quarter of label shipments in 2015. Plastic stock materials will gain popularity due to their aesthetic and performance advantages over paper, as well as a broad shift in favor of plastic packaging. Moreover, plastic is heavily utilized in pressure sensitive, heat-shrink, stretch sleeve, in-mold and thermal transfer labels, each of which is expected to grow at a healthy rate. Among plastic label resins, polypropylene and polyvinyl chloride are widely used, although the latter will lose out to other plastic substrates with lower perceived environmental and health risks. In particular, trends favoring more environmentally friendly substrates will propel gains for polylactic acid, albeit from a very small base.

Digital to be fastest growing printing method

The large majority of US label shipments are printed in some manner before sale to the final user. Flexography represents the leading printing method, benefiting from its prominent position in the pressure sensitive and sleeve label segments. Among other printing technologies -- lithography, screen, letterpress, digital and gravure -- digital printing will enjoy the most rapid gains, expanding at a double-digit annual pace through the forecast period. Label converters will increasingly invest in digital presses to capitalize on trends favoring shorter label runs and mass customization, particularly as product personalization functions as a key marketing tool. Different printing processes can also be combined in an effort to create higher quality label graphics. This trend will have a positive effect on the use of screen and digital technologies.

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Sample Text, Table & Chart

TABLE V-1

LABEL SALES & SHIPMENTS BY APPLICATION METHOD
(million dollars)

Item	2000	2005	2010	2015	2020
Nondurable Goods Retail Sales (bil $)					
$ labels/000$ retail sales					
Label Demand					
+ net exports					
Label Shipments					
Pressure Sensitive					
Glue-Applied					
Stretch Sleeve & Heat-Shrink					
Thermal Transfer					
In-Mold					
Other					

SAMPLE TABLE

FUNCTIONS

Beverages

Through 2015, label demand in the beverage industry is
expand ... 3 billion, matching gains i
packagi ... s will be driven by efforts
beverag ... their products in an increa
petitive ... e differentiation of produ
tempts ... r segments will result in s
run leng ... g market. This, along with
of limited ... er promotional labels, wil
utilization of digital printing technologies. Other technologi
aimed at optimizing efficiency include greater online commu
and automation of prepress workflows, as well as color mana
three-dimensional virtual prototyping.

SAMPLE TEXT

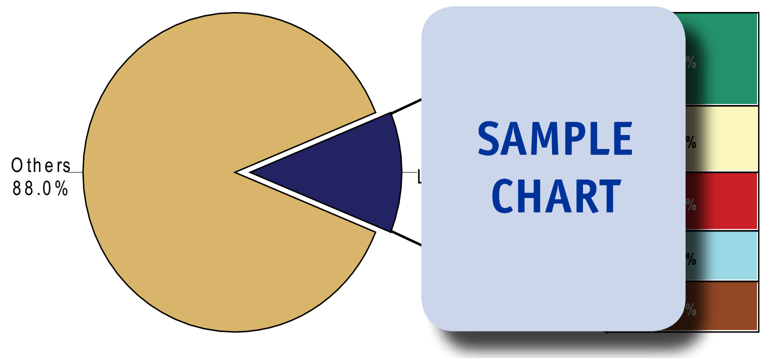
Gains will further be driven by a shift in the product mix toward higher-value labels, as beverage producers seek to give their products a premium image through the use of different materials and finishes. This is often accomplished through the use of clear heat-shrink, full-body labels, and clear pressure sensitive labels, both of which will continue to take market share away from glue-applied types. Trends favoring the use of label-intensive plastic bottles over aluminum cans will continue to provide opportunities for labels, as aluminum cans are typically direct litho printed. Interest in product differentiation will generate demand for clear films as well as textured paper and even foils. Tactile printing is also expected to grow in use, and high quality inks and pri
nologies will be more widely used, at least in the higher-valu
of the beverage market where the greater expense can be jus

Labels used in beverage packaging must be able to with
environments, remaining securely attached during washing,
tion, filling, transportation, chilling and drinking. Due to the
of product image and visual appeal in the highly competitive

191

CHART IX-2

US FINISHED LABEL MARKET SHARE
($15.7 billion, 2010)



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Sample Profile, Table & Forecast

TABLE VI-4

PLASTIC LABEL SHIPMENTS BY APPLICATION METHOD
(million dollars)

Item	2000	2005	2010	2015	2020
Nondurable Goods Retail Sales (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ labels/000$ sales	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Plastic Label Shipments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Pressure Sensitive	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Sleeve & Shrink	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Glue-Applied	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Thermal Transfer	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
In-Mold	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% plastic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Label Shipments	10240	13220	15840	20000	24950

SAMPLE TABLE

COMPANY PROFILES

Graphic Packaging Holding Company
814 Livingston Court
Marietta, GA 30067
770-644-
http://w

Sales: $
US & C ... minations (2010)
Employ

Key Pro ... d film, roll-fed
paper, a

SAMPLE PROFILE

Graphic Packaging Holding Company (GPHC) manufactures and markets paperboard packaging, folding cartons, coated recycled boxboard and specialty bag packaging. The Company operates in two segments: Paperboard Packaging and Flexible Packaging.

The Company is involved in the US label industry through the Flexible Packaging segment, which had 2010 sales of $676 million. The segment comprises operations for the manufacture and sale of labels, multiwall paper bags, plastic packaging and other products. GPHC's labels include heat transfer, cut and stack paper and film, roll-fed paper, and recyclable in-mold labels for use in the food, beverage, household, pharmaceutical, detergent, health and beauty care, automotive, and industrial product markets. The Company manufactures labels at facilities in Norwood, Ohio and St. Charles, Illinois.

GPHC manufactures heat transfer labels under the DI-NA-CAL brand name. DI-NA-CAL products feature reverse rotogravure-printed graphics and are designed to create a seamless, no-label look. These labels are also available with DI-NA-SECURE security inks, which

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"Demand for plastic resins (including additives) used in the production of labels is expected to rise at a 4.0 percent annual rate to 380 million pounds in 2015, outpacing gains in the paper segment. Advances will be fueled by the many advantages -- both in terms of aesthetics and performance -- that these labels have over paper types. Additionally, plastic labels will further benefit from trends favoring plastic containers, as these are complementary packaging products. Moreover, ..."
--Section IV, pg. 78

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Other Studies

World Labels

This study analyzes the world label industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by application method (e.g., pressure sensitive, glue-applied), material (e.g., paper, plastic), printing technology, market (e.g., food, beverages, pharmaceuticals, chemicals, durable goods), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants worldwide.

#2808 .... October 2011 .... $6100

Converted Flexible Packaging

This study analyzes the US converted flexible packaging industry. It presents historical demand data for the years 2000, 2005 and 2010, with forecasts for 2015 and 2020 by material (e.g., plastic film, paper, aluminum foil), product (e.g., bags, pouches) and market (e.g., food packaging, nonfood packaging). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2807 .... October 2011 .... $5100

World Green Packaging

World demand for green packaging is projected to rise 5.7 percent annually through 2015. Recycled content packaging will remain the dominant type, while reusable and degradable packaging grow the fastest. The Asia/Pacific region will see above-average gains and remain the largest regional market. This study analyzes the $160.8 billion global green packaging industry, with forecasts for 2015 and 2020 by product, market, world region and for 19 countries. The study also evaluates company market share and profiles industry players.

#2796 .... August 2011 .... $6100

Active & Intelligent Packaging

US demand for active and intelligent packaging will climb eight percent annually through 2015. Intelligent packaging will be the fastest growing segment, propelled by Quick Response (QR) and other two-dimensional (2D) barcodes. The dominant active packaging segment will be driven by above-average advances for gas scavengers and susceptor packaging. This study analyzes the $1.5 billion US active and intelligent packaging industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry players.

#2772 ....June 2011 .... $4900

World Pharmaceutical Packaging

World demand for pharmaceutical packaging is forecast to rise 5.5 percent annually through 2015. The developed countries of Western Europe, the US and Japan will account for over 70 percent of the amount, although China will provide faster growth opportunities. India and Brazil will also evolve into fast-growing markets. This study analyzes the $47.2 billion world drug packaging industry, with forecasts for 2015 and 2020 by raw material and resin, product, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#2765 ....June 2011 .... $6400

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