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World Labels

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

Study #2808 | October 2011 | \$6100 | 440 pages

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Plastic stock materials will continue to benefit from a broad shift in favor of plastic packaging, as well as from their aesthetic and performance advantages over paper-based label stocks.

World demand to rise 5.2% annually through 2015

World demand for labels is projected to rise 5.2 percent per year to 51.6 billion square meters in 2015, valued at \$110 billion. Advances will be driven by gains in manufacturing activity, which will increase from a low 2010 base. Pressure sensitive labels will remain the largest product type and continue to take market share from glue-applied products in major packaging applications such as food, beverages, pharmaceuticals and cosmetics. Above-average demand growth is also expected in other label segments such as stretch sleeve, heat-shrink and in-mold labels, though gains in these relatively newer label technologies will stem from small bases. Plastic stock materials will continue to benefit from a broad shift in favor of plastic packaging, as well as from their aesthetic and performance advantages over paper-based label stocks.

Dominant pressure sensitive labels segment to gain market share

In 2010, pressure sensitive labels accounted for 52 percent of the global label market (in volume terms), a share that is expected to increase even further in the coming years. Pressure sensitive labels will continue to benefit from a number of advantageous qualities, including ease of use, diversity of applications and graphics, and versatility. Additionally, minimal set-up and clean-up

World Label Demand, 2010 (40.1 billion square meters)



Asia/Pacific
36%

North America
23%

Western Europe
22%

Other Regions
19%

photo: Schreiner MedPharm

time, combined with rapid changeover, make these labels more adaptable for short-run lines. Moreover, the application speed (up to approximately 1,000 per minute) of pressure sensitive labels is now significantly faster than other application systems such as in-mold, imparting operational efficiencies and labor cost savings. As a result of these factors, some of the best opportunities in the label market will continue to be found in the pressure sensitive segment.

Smaller label segments to see fastest growth

While demand for glue-applied labels will see below-average growth, this segment will remain the second largest overall,

accounting for more than 30 percent of global label market volume through 2015. Sales of glue-applied labels will be supported by their low material costs and rapid application speeds (up to 2,000 per minute). However, the inconsistency in application and placement of glue-applied labels, as well as their more difficult clean-up and generally inferior aesthetics, will serve to limit demand gains. On the other hand, smaller label segments such as stretch sleeve, heat-shrink and in-mold labels will see some of the fastest growth through the forecast period. For instance, stretch sleeve labels will benefit from their appealing 360-degree graphics, as well as superior moisture resistance.

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Sample Text, Table & Chart

WESTERN EUROPE

Germany: Label Demand by Market

Germany had the highest per capita label consumption (26 square meters) in the world and well-developed manufacturing and well-developed manufacturing. Germany's label market is a significant part of the world goods market. This is not surprising, given Germany's status as a major exporter of manufactured goods and a host of other durable goods. Such factors will continue to support label demand in the goods market.

Germany's large food and beverage industries (the largest region) represent important markets for labels as well. For instance, Germany is the only country in the developed world where plastic bottles are of any significance. Continued penetration of plastic bottles will help slow the onslaught from labelless metal cans. In value terms, the market will shift toward the higher end with the proliferation of advanced, value-added beer labels such as thermochromatics. However, use of more durable plastic labels may also reduce demand by allowing labels to be reused with returnable bottles.

Other label applications are also quite significant in the country. For instance, Germany is among the world's largest chemical and pharmaceutical producing nations, and is a major exporter of chemicals and pharmaceuticals. In fact, chemical and drug exports rival those of the US, and represent one of Germany's largest export industries. Factors will continue to support demand for related labels, especially high-value types such as clear plastic and silk-screened configurations which offer high visibility and tamper-evident features.

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SAMPLE
TEXT

TABLE V-5

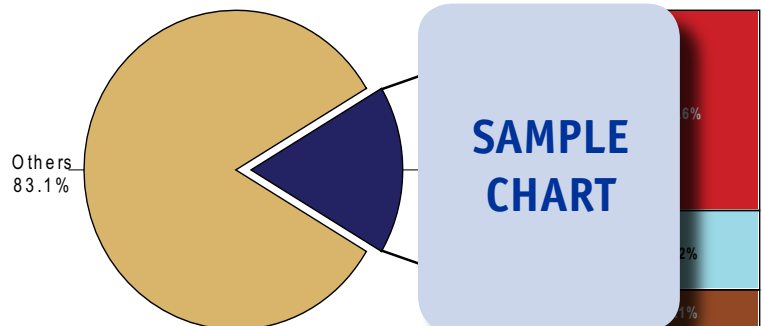
GERMANY -- LABEL DEMAND
 BY APPLICATION METHOD & MATERIAL
 (million square meters)

Item	2000	2005	2010	2015	2020
Population (mil persons)	82.0	82.0	82.0	82.0	82.0
\$ GDP/capita	30,000	35,000	40,000	45,000	50,000
Gross Domestic Product (bil 2009\$)	2,460	2,870	3,280	3,690	4,100
sq m labels/capita	26	26	26	26	26
sq m labels/000\$ GDP	0.00106	0.00106	0.00106	0.00106	0.00106
Label Demand					
By Application Method:					
Pressure Sensitive	1,500	1,500	1,500	1,500	1,500
Glue-Applied	1,000	1,000	1,000	1,000	1,000
Other	500	500	500	500	500
By Material:					
Paper	1,000	1,000	1,000	1,000	1,000
Plastic & Other	500	500	500	500	500
% Germany	21.0	21.0	21.0	21.0	21.0
Western Europe Label Demand	7710	8680	9040	10480	11880

SAMPLE
TABLE

CHART VIII-1

WORLD LABEL STOCK MARKET SHARE
 (\$35 billion, 2010)

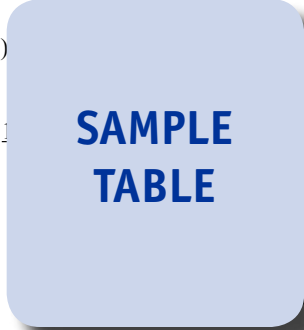


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE V-6
GERMANY -- LABEL DEMAND BY MARKET
 (million square meters)

Item	2000	2005	2010	2015	2020
Manufacturing Value Added (bil 2009\$) sq m labels/000\$ MVA					
Label Demand					
Food					
Beverages					
Pharmaceuticals					
Household & Industrial Chemicals					
Durable Goods					
Other Markets					



COMPANY PROFILES

Nitto Denko Corporation
 5-25, Umeda 2-chome
 Kita-ku, Osaka 530
 Japan
 816-6452-0000
 http://www.nitto-denko.com

Sales: \$1.1 billion
 Geograph: Japan 35%, Americas
 6%, Europe
 Employ: 1,000

Key Products: Industrial Tape, Optronics, and Medical and Membrane.

Nitto Denko is a manufacturer of specialty products used in optical media, semiconductor, home appliance, electrical insulation, automotive, aerospace, housing and construction, health care, packaging, graphic arts, paper-making and printing, entertainment, and environmental protection applications. The Company operates in three segments: Industrial Tape, Optronics, and Medical and Membrane.

The Company participates in the world label industry through the Industrial Products segment, which had FY 2011 sales of \$2.8 billion. Among other products, the segment manufactures DURATAK heat transfer barcode labels. These labels include DURATAK 10PN/PON high-resolution types, which are intended for nameplate and component identification applications; DURATAK PT general-purpose nameplate labels; DURATAK PG tire manufacturing labels; DURATAK PF100 weather-resistant labels; DURATAK PTNS silicone-free labels; DURATAK P printed circuit board labels; and DURATAK S40H heat-resistant silicone labels.

SAMPLE PROFILE

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“Through the forecast period, digital printing technology in Germany will enjoy the most rapid gains. Trends favoring short runs will remain an important factor promoting the use of digital labeling technologies, as manufacturers expand product lines and increasingly utilize on-product promotional material. Digital printing will further benefit from the popularity of customizing product labels, as this technology is particularly suitable for this application. Going forward, more label converters will invest in digital presses as they aim to capitalize on these trends.”
 --Section V, pg. 148

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OTHER STUDIES

Converted Flexible Packaging

Demand for converted flexible packaging in the US will rise 3.8 percent annually through 2015. Pouches will lead gains based on continued conversions to stand-up pouches and healthy gains for flat pouches, along with lighter weight and reduced material use. Bags will remain the largest segment. Food markets will outpace nonfood uses. This study analyzes the \$15.1 billion US converted flexible packaging industry, with forecasts for 2015 and 2020 by material, product and market. The study also evaluates company market share and profiles industry players.
 #2807 October 2011 \$5100

Labels

US label shipments will rise 4.8 percent annually through 2015. Pressure sensitive labels will remain dominant, but will continue to face growing competition from stretch sleeve, heat-shrink, in-mold and other labeling methods. Paper will remain by far the leading stock material, but will continue to lose market share to plastic. This study analyzes the \$15.7 billion US label industry, with forecasts for 2015 and 2020 by raw and stock material, application method, printing technology and function. The study also evaluates company market share and profiles industry players.
 #2784 August 2011 \$5100

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

Paper versus Plastic in Packaging

In selected packaging markets where paper and plastic compete, plastic will make further inroads into paper. Rigid packaging demand will slightly outpace flexible packaging based on above-average growth for tubs and cups, trays, clamshells and two-piece high visibility plastic containers. This study analyzes the 23.2 billion pound competitive plastic and paper packaging industry in the US, with forecasts for 2014 and 2019 by product and market. It also discusses market leaders and profiles selected industry players.
 #2698 November 2010 \$4900

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The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

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