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World Labels

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

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

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World Labels

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

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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.

World Label Demand, 2010
(40.1 billion square meters)

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 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 r
26 square meters) in the wor fluent
and well-developed manufa one-
Germany's label market is a SAMPLE TEXT good
This is not surprising, given world
exporter of manufactured g and
ability are globally renowne cars,
and a host of other durable g premiu
traits. Such factors will continue to support label demand in
goods market.

Germany's large food and beverage industries (the large
region) represent important markets for labels as well. For in
Germany is the only country in the developed world where p
bottles are of any significance. Continued penetration of plas
bottles will help slow the onslaught from labelless metal cans. In value
terms, the market will shift toward the higher end with the prolifera-
tion 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 coun-
try. For instance, Germany is among the world's largest chemical and
pharmaceutical producing nations, and is a major exporter of
and pharmaceuticals. In fact, chemical and drug exports riva
the US, and represent one of Germany's largest export indus
factors will continue to support demand for related labels, es
high-value types such as clear plastic and silk-screened conf
which offer high visibility and tamper-evident features.

149

TABLE V-5

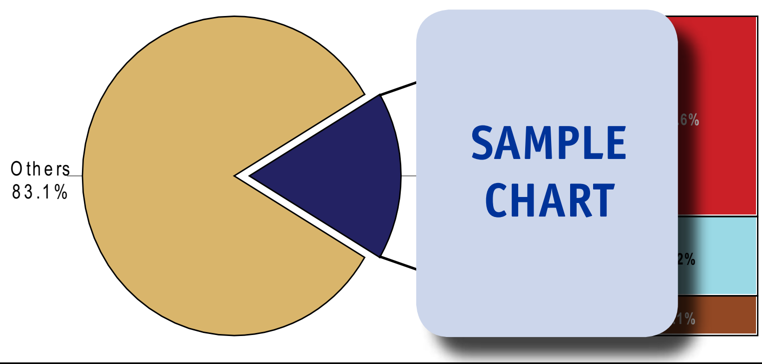
GERMANY -- LABEL DEMAND BY APPLICATION METHOD & MATERIAL (million square meters)

SAMPLE TABLE

Item	2000	2005	2010	2015	2020
Population (mil persons)					
$ GDP/capita					
Gross Domestic Product (bil 2009$)					
sq m labels/capita					
sq m labels/000$ GDP					
Label Demand					
By Application Method:					
Pressure Sensitive					
Glue-Applied					
Other					
By Material:					
Paper					
Plastic & Other					
% Germany					23.7
Western Europe Label Demand	7710	8680	9040	10480	11880

CHART VIII-1

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



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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$)					7
sq m labels/000$ MVA					6
Label Demand	1				0
Food					0
Beverages					5
Pharmaceuticals					5
Household & Industrial Chemicals					5
Durable Goods					5
Other Markets					0

SAMPLE TABLE

COMPANY PROFILES

Nitto Denko Corporation
5-25, Umeda 2-chome
Kita-ku, Osaka 530
Japan
816-6452
http://wv

Sales: $
Geograp apan 35%, Americas
6%, Eur
Employ

Key Pro

SAMPLE PROFILE

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 DURATACK heat transfer barcode labels. These labels include DURATACK 10PN/PON high-resolution types, which are intended for nameplate and component identification applications; DURATACK PT general-purpose nameplate labels; DURATACK PG tire manufacturing labels; DURATACK PF100 weather-resistant labels; DURATACK PTNS silicone-free labels; DURATACK P printed circuit board labels; and DURATACK S40H heat-resistant silicone labels.

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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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