



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form & Corporate Use License 7](#)

[About Freedonia, Custom Research, Related Studies, 8](#)

# Labels

---

## US Industry Study with Forecasts for **2017 & 2022**

---

Study #3057 | July 2013 | \$5300 | 360 pages

---

[www.freedoniagroup.com](http://www.freedoniagroup.com)



### The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General .....	4
Macroeconomic Outlook .....	4
Demographic Outlook .....	8
Consumer Income & Spending .....	11
Manufacturing Outlook.....	14
Retail Sales.....	18
Business Establishments .....	22
Packaging Trends .....	25
Packaging Outlook .....	26
Paper .....	28
Plastic.....	29
Metal .....	30
Glass & Wood.....	31
Labeling Trends.....	31
Mailing & Shipping Trends.....	34
USPS Outlook.....	34
Automation Technologies.....	39
Historical Market Trends.....	40
Pricing Trends.....	43
Regulatory Issues.....	45
Environmental Considerations .....	48
World Markets.....	52
US Foreign Trade.....	54

### TECHNOLOGICAL TRENDS

General .....	57
Barcoding Trends .....	57
Growth Factors.....	59
Applications .....	61
Packaging & Retail .....	62
Mailing & Shipping.....	63
Manufacturing & Distribution .....	63
Other Applications.....	64
Smart Labeling .....	66
Technologies & Suppliers .....	68
Applications .....	71
Competitive Profile .....	72
Competitive Technologies.....	73
Direct Printing .....	74
Electronic Shelf Labeling .....	77

### RAW MATERIALS

General .....	79
Paper .....	80
Types.....	81
Producers .....	83
Plastic.....	85
Polyethylene.....	89
Polypropylene .....	90

Polyvinyl Chloride .....	93
Other Resins .....	94
Adhesives .....	97
Inks.....	100
Types.....	100
Technologies.....	102
Other .....	104

### APPLICATION METHODS

General .....	107
Pressure Sensitive .....	109
Attributes.....	112
Materials.....	113
Applications .....	116
Producers .....	117
Glue-Applied .....	118
Attributes.....	121
Materials.....	122
Applications .....	123
Producers .....	123
Heat-Shrink & Stretch Sleeve .....	124
Heat-Shrinks.....	126
Types .....	128
Materials.....	130
Applications .....	133
Producers.....	135
Stretch Sleeves.....	136
Attributes .....	137
Materials.....	137
Applications .....	138
Producers.....	138
Heat Transfer.....	139
Attributes.....	140
Applications .....	141
Producers .....	142
In-Mold .....	143
Attributes.....	146
Materials .....	149
Applications .....	150
Producers .....	151
Other Adhesive .....	152
Non-Shrink Wraparound .....	153
Heat-Seal .....	154
Gummed.....	155

### STOCK MATERIALS

General .....	156
Paper .....	157
Types.....	158
Application Methods .....	159
Plastic.....	161
Types.....	163
Application Methods .....	164
Other .....	165

### PRINTING TECHNOLOGIES

General .....	167
Flexography .....	171
Characteristics & Technologies.....	173
Applications .....	174
Lithography .....	175
Characteristics & Technologies.....	176
Applications .....	177
Screen.....	178
Characteristics & Technologies.....	179
Applications .....	180
Digital.....	181
Characteristics & Technologies.....	182
Applications .....	185
Letterpress.....	187
Characteristics & Technologies.....	188
Applications .....	189
Gravure .....	189
Characteristics & Technologies.....	191
Applications .....	193
Variable Information Printing.....	193

### FUNCTIONS

General .....	195
Primary Packaging Labels .....	198
Food Processing .....	201
Applications .....	204
Label Types .....	205
Beverages.....	206
Nonalcoholic Beverages.....	208
Alcoholic Beverages.....	210
Pharmaceuticals .....	213
Regulatory Factors.....	214
Label Types .....	215
Cosmetics & Toiletries .....	218
Applications .....	219
Label Types .....	220
Other Primary Packaging .....	222
Secondary Labels .....	224
Retail .....	225
Other Secondary .....	228
Industrial Labels .....	230
Motor Vehicles .....	232
Other Industrial.....	233
Mailing & Shipping Labels .....	234
Decorative Labels.....	237
Other Labels.....	239

### INDUSTRY STRUCTURE

General .....	241
Market Share .....	244
Label Stock Producers.....	245
Label Printers & Converters .....	250

(continued on following page)

[Click here to purchase online](#)

## Table of Contents

(continued from previous page)

Competitive Strategies.....	252
Cost Considerations.....	254
Mergers & Acquisitions.....	256
Cooperative Agreements.....	262
Manufacturing.....	263
Marketing.....	265
Distribution.....	267

## COMPANY PROFILES

Acucote Incorporated.....	269
Amcort Limited.....	270
AR Metallizing.....	272
Avery Dennison.....	273
Bemis Company.....	279
Brady Corporation.....	282
CCL Industries.....	284
Cenveo Incorporated.....	288
Chesapeake Limited.....	291
Donnelley (RR) & Sons.....	293
Dow Corning.....	295
Epsen Hillmer Graphics.....	296
Exxon Mobil.....	297
FLEXcon Corporation.....	299
Fort Dearborn.....	302
Fuji Seal International.....	304
Graphic Packaging.....	306
Green Bay Packaging.....	307
Hammer Packaging.....	309
Illinois Tool Works.....	310
Intermec Incorporated.....	313
International Paper.....	315
Lintec Corporation.....	317
Loparex BV.....	319
Mondi Group.....	321
MPI Label Systems.....	323
Multi-Color Corporation.....	325
NewPage Corporation.....	327
Printpack Incorporated.....	328
Ritrama SpA.....	330
Smyth Companies.....	331
Spear USA.....	333
Spinnaker Coating.....	334
Standard Register.....	335
Staples Incorporated.....	337
Stora Enso.....	338
Taghleef Industries.....	340
3M Company.....	342
UPM-Kymmene Corporation.....	345
WS Packaging Group.....	347
Zebra Technologies Corporation.....	350
Other Companies in the Label Industry.....	352

## List of Tables

### EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

### MARKET ENVIRONMENT

1 Macroeconomic Indicators.....	7
2 Population & Households.....	11
3 Personal Consumption Expenditures.....	14
4 Manufacturers' Shipments.....	18
5 Retail Sales.....	22
6 Business Establishments.....	25
7 Packaging Supply & Demand.....	28
8 US Postal Service Mail Revenues & Pieces of Mail Handled.....	38
9 Label Demand, 2002-2012.....	42
10 US Foreign Trade in Labels.....	56

### RAW MATERIALS

1 Raw Material Use in Labels.....	80
-----------------------------------	----

### APPLICATION METHODS

1 Label Supply & Demand by Application Method.....	108
2 Pressure Sensitive Label Demand by Material.....	112
3 Glue-Applied Label Demand by Material.....	121
4 Heat-Shrink & Stretch Sleeve Label Demand by Type & Material.....	126
5 Heat Transfer Label Demand by Material.....	140
6 In-Mold Label Demand by Material & Molding Process.....	146
7 Other Adhesive Label Demand by Material.....	153

### STOCK MATERIALS

1 Label Demand by Stock Material.....	157
2 Paper Label Demand by Type.....	159
3 Paper Label Demand by Application Method.....	160
4 Plastic Label Demand by Application Method.....	162
5 Other Label Demand by Application Method.....	166

### PRINTING TECHNOLOGIES

1 Label Demand by Printing Technology....	170
2 Flexographic Label Demand by Type.....	173
3 Lithographic Label Demand by Type.....	176
4 Screen Printed Label Demand by Type....	179
5 Digital Label Demand by Type.....	182

6 Letterpress Label Demand by Type.....	188
7 Gravure Label Demand by Type.....	191

### FUNCTIONS

1 Label Demand by Function.....	197
2 Primary Packaging Label Demand by Market.....	200
3 Food Processing Label Demand.....	203
4 Beverage Label Demand.....	208
5 Pharmaceutical Label Demand.....	214
6 Cosmetic & Toiletry Label Demand.....	219
7 Other Primary Packaging Label Demand.....	224
8 Secondary Label Demand by Market.....	225
9 Retail Label Demand.....	228
10 Other Secondary Label Demand.....	230
11 Industrial Label Demand by Market.....	232
12 Mailing & Shipping Label Demand.....	236
13 Decorative Label Demand.....	239
14 Other Label Demand.....	240

### INDUSTRY STRUCTURE

1 US Label Sales by Company, 2012.....	243
2 Selected Acquisitions & Divestitures.....	259

## List of Charts

### MARKET ENVIRONMENT

1 Label Demand, 2002-2012.....	43
2 Label Pricing, 2002-2022.....	45
3 World Label Demand, 2012.....	54

### APPLICATION METHODS

1 Label Demand by Application Method, 2012.....	109
--	-----

### PRINTING TECHNOLOGIES

1 Label Demand by Printing Technology, 2012.....	170
---	-----

### FUNCTIONS

1 Label Demand by Function, 2012.....	198
2 Primary Packaging Label Demand by Market, 2012.....	201

### INDUSTRY STRUCTURE

1 US Label Stock Market Share, 2012.....	246
2 US Finished Label Market Share, 2012....	252

*While pressure sensitive labels will enjoy healthy advances, they will face growing competition from alternative labeling methods such as heat-shrink and stretch sleeve, and in-mold labels.*

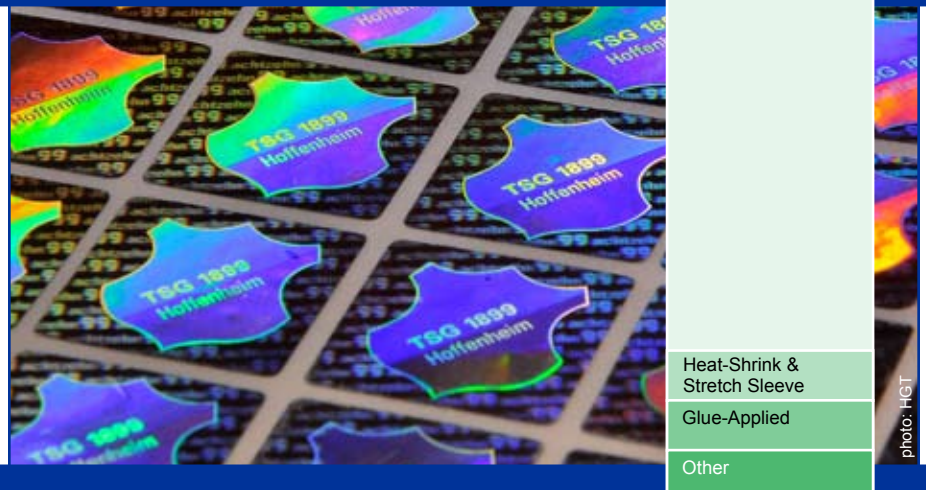
## US demand to rise 4.2% annually through 2017

Label demand in the US is projected to climb 4.2 percent annually to \$19.1 billion in 2017. While the dominant pressure sensitive segment will enjoy healthy advances, it will face growing competition from alternative labeling methods for primary packaging, such as heat-shrink and stretch sleeve, and in-mold labels. Heat-shrink labels will experience the fastest gains through 2017, with increases attributable to their ability to form-fit contoured containers and their strong visual appeal afforded by 360-degree graphics and maximum promotional area, enabling consumer products to stand out in a crowded marketplace. Glue-applied labels, despite their lower unit costs and speed of application, will face further loss of share due to competition from higher performing labels, especially in key markets such as beer and wine.

## Plastic stock to continue gaining market share

Paper will continue to account for the majority of label stock over the forecast period based on its cost advantages and the ability to be coated for enhanced durability. The use of higher-end materials -- such as metallic and holographic papers -- will also promote value growth. However, plastic stock will continue to capture share from paper in a broad range of label applications based on aesthetic and performance advantages, along with a shift in the overall packag-

## US Label Demand by Application Method (\$19.1 billion, 2017)



ing product mix toward plastics. The popularity of the no-label look will also bode well for plastic labels. By 2017, plastic will account for more than 30 percent of label demand in value terms.

## Digital label printing to see double-digit growth

The vast majority of labels are printed in some manner before sale to the final user, and additional printing, such as barcoding or addressing, may be done on site by the customer. Flexography is the leading label printing technology due to its versatility, low cost, and suitability for use in the large pressure sensitive segment and the faster growing sleeve label segment. However, digital printing

will experience double-digit annual advances through 2017 as it continues to displace traditional methods such as lithography and flexography. Advances will reflect improvements in print quality and speed that will fuel growing adoption by label converters and printers. Among the advantages of digital printing are increased design flexibility, shortened lead times, and lower costs, especially for short run projects, since there are no plate charges or setup fees, which add to the cost of traditional commercial printing. Moreover, the benefits of digital label printing coincide with the trend in many packaged goods markets toward more product variation and target marketing, both of which tend to result in smaller quantity runs.

Copyright 2013 The Freedonia Group, Inc.

[Click here to purchase online](#)



## Sample Text, Table & Chart

### PRINTING TECHNOLOGIES

#### Flexography

Flexographic printed label demand is forecast to advance overall print demand growth. The sensitive adhesive (PSA) segment will drive growth, with continued improvement in UV-curable flexo inks and combination presses. Flexographic technologies are valued for their cost efficiency and compatibility with short runs, in addition to fast turnaround capabilities. Although forecast to further expand its share of the total printed label market, the growth of digital print industry will limit growth to some degree, particularly in shorter product runs. Furthermore, intense competition will place downward pressure on pricing, thus restricting overall value gains.

Flexography boasts several advantages over other printing technologies. These include the ability to print on many different substrates, good color saturation, versatility in terms of run lengths, low cost, relatively low labor requirements for print operation, and simplicity of use. Technological advances have also significantly enhanced flexo print quality as image quality had been one area where flexo lagged other printing techniques. 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 particularly most pronounced for flexography. As a result, flexography has begun to supplant other techniques in many applications. Due to the development of water-based flexo inks, flexo also enjoys a position as one of the most environmentally favorable printing techniques. Drawbacks to flexographic printing include costs associated with printing plates, especially in the case of short runs.

Copyright 2013 The Freedonia Group, Inc.

**SAMPLE  
TEXT**

TABLE V-4

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

Item	2002	2007	2012	2017	2022
Plastic Bottle & Jar Demand (bil units) \$ labels/000 bottles					
Heat-Shrink & Stretch Sleeve Labels					
By Type:					
Heat-Shrink					
Stretch Sleeve					
By Material:					
Polyethylene					
Polyvinyl Chloride					
Other Plastics					
% heat-shrink & stretch sleeve Label Demand					

**SAMPLE  
TABLE**

CHART IX-1

### US LABEL STOCK MARKET SHARE (\$3.2 billion, 2012)

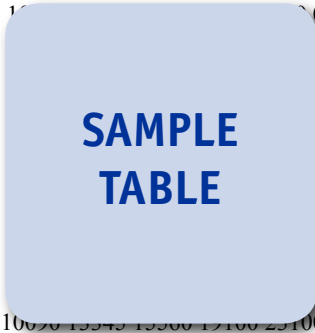


**SAMPLE  
CHART**

## Sample Profile, Table & Forecast

**TABLE VIII-2**  
**PRIMARY PACKAGING LABEL DEMAND BY MARKET**  
 (million dollars)

Item	2002	2007	2012	2017	2022
Packaging Demand (bil \$) \$ labels/000\$ pkg	10000	13343	15300	17100	23100
Primary Packaging Label Demand					
Food Processing					
Beverages					
Pharmaceuticals					
Cosmetics & Toiletries					
Other					
% primary Label Demand	100%	133%	153%	171%	231%



**COMPANY PROFILES**

**Dow Corning Corporation**  
 2200 West Salzburg Road  
 Midland, MI 48686  
 989-496-4000  
 http://www.dowcorning.com

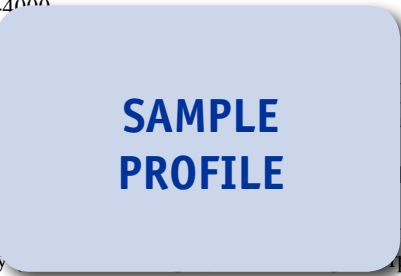
Sales: \$ (billion)  
 Employ: (employees)

Key Products: release coatings

Dow Corning is a Dow Chemical Company. The Company is incorporated (Corning, New York). The Company develops, manufactures, and markets polymers and other materials based on silicon chemistry. Dow Corning's products are designed to release, defoam, insulate, waterproof, lubricate, seal, coat, and protect.

The Company is involved in the US label industry via the manufacture, development, and sale of pressure sensitive adhesives and release coatings for the electronics, construction, health care, and paper manufacturing and processing markets. Dow Corning markets these products via the DOW CORNING tradename. For label, tape, transfer film, and other end uses, the Company produces DOW CORNING 2013, DOW CORNING 280A, and DOW CORNING 7355 pressure sensitive adhesives. DOW CORNING 2013 is a solvent free, clear adhesive that can be used at low curing temperatures. The Company's DOW CORNING 280A adhesive is engineered to provide enhanced tack and adhesion at temperatures up to 500 degrees Fahrenheit. Dow Corning makes DOW CORNING 7355 adhesives using a dispersion of polydimethylsiloxane gum and resin formulated to provide high adhesion and temperature stability. The Company's release coatings include

Copyright 2013 The Freedonia Group, Inc.



**STUDY  
COVERAGE**

This Freedonia industry study, **Labels**, offers historical demand data (2002, 2007, 2012) plus forecasts for 2017 and 2022 by raw material, application method, stock material, print technology, and function. The study also assesses key market environment factors, evaluates company market share data, and profiles 41 US industry participants.

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or + 1 440.684.9600

FAX: + 1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM

F-WEB.-3057

Labels..... \$5300

Corporate Use License (add to study price) \* + \$2600
Additional Print Copies @ \$600 each \*
Total (including selected option) \$

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

Credit Card # Expiration Date MM YY

Signature

Name

Title

Company

Division

Street (No PO Box please)

City/State/Zip

Country

Phone Fax

Email

\* Please check appropriate option and sign below to order an electronic version of the study.

Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature

Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2600; one additional user, add \$600; two additional users, add \$1200; three additional users, add \$1800.

Signature

**OTHER STUDIES**

**Protective Packaging**

US protective packaging demand is projected to increase 4.5 percent per year to \$6.4 billion in 2018. E-commerce fulfillment will drive gains for protective mailers, air pillows and bubble packaging. Insulated shipping containers will benefit from temperature-sensitive pharmaceutical handling requirements and storage temperature requirements. This study analyzes the \$5.1 billion US protective packaging industry, with forecasts for 2018 and 2023 by function, market and product. The study also evaluates company market share and profiles industry players.

#3142 ..... March 2014 ..... \$5300

**World 3D Printing (Additive Manufacturing)**

World demand for 3D printers, materials and software will rise 21 percent yearly to \$5 billion in 2017. North America will remain the largest market while developing regions will grow the fastest. Plastics will continue to lead materials demand but will be outpaced by metals. The medical and dental market will offer some of the best opportunities. This study analyzes the \$2 billion world 3D printing industry, with forecasts for 2017 and 2022 by product, market, world region, and for 14 countries. The study also evaluates company market share and profiles industry players.

#3123 ..... December 2013 ..... \$6100

**Active & Intelligent Packaging**

US active and intelligent packaging demand is forecast to increase 8.0 percent annually to \$3.5 billion in 2017. Intelligent packaging will record double digit annual gains, led by time-temperature indicator labels. Gas scavengers, suscepter packaging and self-venting packaging will be among the fastest growing active packaging types. This study analyzes the \$2.4 billion US active and intelligent packaging industry, with forecasts for 2017 and 2022 by product and market. The study also evaluates company market share and profiles industry players.

#3117 ..... January 2014 ..... \$5100

**World Medical Device Packaging**

World demand for medical device packaging is projected to increase 5.9 percent annually to \$25.7 billion in 2017. The US will remain the largest market while China will provide the largest and broadest sales opportunities. Pouches, trays and clamshell packs will continue to lead sales among container types. This study analyzes the \$19.3 billion world market for medical device packaging, with forecasts for 2017 and 2022 by product, raw material, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#3056 ..... August 2013 ..... \$6100

**World Pharmaceutical Packaging**

World demand for drug packaging products will increase 6.4 percent annually to \$90 billion in 2017. Most demand will remain in the developed economies of Canada, Japan, the US, and Western Europe. Pre-fillable syringes and parenteral vials will lead growth as new injectable therapies are introduced. This study analyzes the \$66 billion world drug packaging industry, with forecasts for 2017 and 2022 by product, world region, and for 16 major countries. The study also evaluates company market share, profiles industry players and examines raw material usage.

#3025 ..... May 2013 ..... \$6500

**About The Freedonia Group**

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

[Click here to learn more about Freedonia](#)

**Freedonia Custom Research**

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)