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Labels

US Industry Study with Forecasts for 2019 & 2024

Study #3291 | June 2015 | \$5500 | 388 pages

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Gains will be fueled by economic expansion, and by solid growth in the dominant pressure sensitive segment based on a versatility of applications and suitability for value added products such as smart labels.

US demand to rise 3.8% annually through 2019

Demand for labels in the US is projected to increase 3.8 percent annually to \$19.7 billion in 2019. Since labels serve a breadth of applications, gains will be fueled by overall economic expansion, population increases, and a healthy outlook for consumer spending. Solid growth in the dominant pressure sensitive segment will reflect versatility of applications as well as suitability for value added products such as smart labels. The maturing of some applications along with increasingly intense competition in primary packaging applications with other label types, especially heat-shrink and in-mold labels (IML), will moderate growth. Among competing label technologies, heat-shrink and IML are expected to experience the most rapid growth through 2019. While remaining an important component of the label mix, glue-applied labels will face further losses to pressure sensitive labels, even in traditional strongholds such as wine, spirits, and specialty beverages.

Plastics to make further inroads on paper stock

Though paper will continue to account for the majority of label stock, plastics will make further inroads at the expense of paper. These gains will reflect the aesthetic and performance advantages of plastic labels, as well as the significance of plastic packaging. Additionally, labeling methods which rely heavily on

US Label Demand, 2019 (\$19.7 billion)



Pressure Sensitive

Stretch Sleeve & Heat-Shrink

Glue-Applied

Other Types

plastic substrates -- such as pressure sensitive, in-mold, and sleeves -- are increasingly popular. The coveted no-label look in a variety of consumer products will also promote increases for plastic label stock.

Secondary, mailing/shipping labels to grow fastest

Primary packaging, which represented almost 50 percent of demand in 2014, is the leading application for labels. While gains will be aided by greater use of higher value labels, including security labels for pharmaceuticals and larger, full-body labels, prospects will be held back by the maturity of some applications along with expanded use of flexible

packaging, which typically utilizes direct printing rather than labels. Secondary labeling and labels used in mailing and shipping are projected to achieve the fastest growth through 2019. Gains in secondary labeling will be promoted by increases in retail sales and expanding identification and tracking needs in institutional, transportation, and distribution markets. Continued strong expansion for Internet shopping will fuel increases in related package shipping activity, which will propel growth for labels in mailing and shipping uses. However, address labels will see continued declines based on further contraction in the volume of items being mailed in light of increased electronic communication.

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Sample Text, Table & Chart

APPLICATION METHODS

Heat-Shrink

Demand for heat-shrink labels is expected to expand annually to \$1.5 billion by 2024, the fastest growth among label types. Heat-shrink sleeve and wrap labels are the most common types. The use of heat-shrink labels is promoted by an overall trend in packaging in favor of materials, including plastic, that offer gains in functionality and appeal of shrink wrap. For example, these labels provide a 30-degree aesthetic appeal for their capacity to provide tamper evidence, and their increased effectiveness will drive future growth. However, overall growth value will be restrained to some extent by downward pricing as lower cost oriented polypropylene (OPP) labels compete more effectively with polyvinyl chloride (PVC) and polyethylene terephthalate (PET) types.

As is the case with stretch sleeves, heat-shrink labels are generally preprinted before application, on one or both sides. The difference is that once on the container, heat-shrink labels pass through a heat tunnel, which causes the heat sensitive resin to shrink to fit the contours of the container. This is just one advantage heat-shrinks have over alternative label types, as eye-catching contoured containers have become an increasingly popular marketing tool for producers of consumer nondurables seeking to differentiate their offerings and build brand awareness in a crowded marketplace. Shrink labels are also well suited for single-serving containers such as yogurt and cereal cups.

In addition to their ability to accentuate contoured and irregularly shaped containers, shrink labels are also valued for their ability to provide tamper evidence, thus ensuring that the product is safe for use. In addition, full-body shrink labels can serve to protect contents of a container from UV degradation. Moreover, they

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SAMPLE
TEXT

TABLE V-4

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

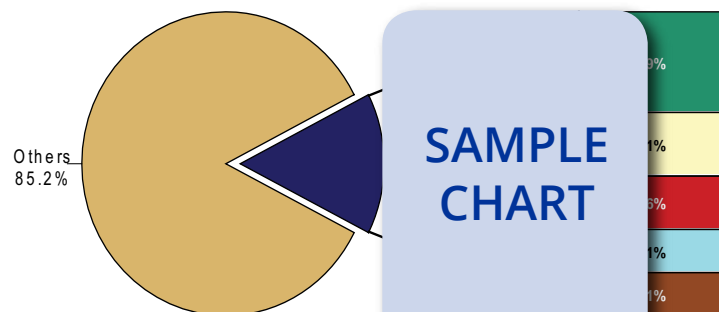
Item	2004	2009	2014	2019	2024
Plastic Bottle & Jar Demand (bil units) \$ labels/000 bottles					
Heat-Shrink & Stretch Sleeve Labels					
By Type:					
Heat-Shrink					
Stretch Sleeve					
By Material:					
Polyethylene					
Polyvinyl Chloride					
Other Plastics					
% heat-shrink & stretch sleeve Label Demand					

Source: The Freedonia Group, Inc.

SAMPLE
TABLE

CHART IX-2

US FINISHED LABEL MARKET SHARE, 2014
 (\$16.3 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

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

Item	2004	2009	2014	2019	2024
Packaging Demand (bil \$) \$ labels/000\$ pkg					
Primary Packaging Label Demand					
Food Processing					
Beverages					
Pharmaceuticals					
Cosmetics & Toiletries					
Other					
% primary packaging Label Demand					

Source: The Freedonia Group, Inc.

COMPANY PROFILES

Dow Corning Corporation

2200 West Salzburg Road
 Midland, MI 48686
 989-496-
<http://www>

Sales: \$
 Employ

Key Pro release coatings

Dow Corning Corporation is a Corning Incorporated (Corning, New York) and Dow Chemical Company (Midland, Michigan). 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 participates in the US label industry through the development, manufacture, and sale of pressure sensitive adhesives and release coatings for labels used in the beauty and personal care, health-care, household and cleaning, automotive, electronics, packaging, and other industries. Dow Corning markets these products under the DOW CORNING tradename. For label, tape, transfer film, and other end uses, the Company produces such products as DOW CORNING 2013, DOW CORNING 282, and DOW CORNING 7388. DOW CORNING 2013 is a solvent-free, clear adhesive that can be used at low curing temperatures. The Company's DOW CORNING 282 adhesive is made from a dispersion of polydimethyl dixiloxane gum and resin and is suitable for applications where high adhesion is necessary. DOW CORNING 7388 adhesive from the Company is diluted with xylene and suitable for use in high-temperature environments. Dow Corning's

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STUDY COVERAGE

This Freedonia study, *Labels*, presents historical demand data (2004, 2009, 2014) and forecasts (2019, 2024) by raw material, application method, function, stock material and printing technology. The study also considers key market environment factors, examines technological issues, assesses the industry structure, analyzes company market share and profiles 46 competitors in the US label industry.

Related Studies

Wine Packaging

This study analyzes the US wine packaging industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by container (e.g., glass bottles, bag-in-box, plastic bottles, aseptic cartons, aluminum cans, pouches), closure (e.g., natural and technical cork, synthetic cork, aluminum screw caps), accessory (e.g., labels, capsules) and bulk packaging (e.g., flexitanks, intermediate bulk containers). The study also considers market environment factors, evaluates company market share and profiles industry competitors.

#3308.....August 2015.....\$5300

World Pharmaceutical Packaging

This study analyzes the world drug packaging industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., plastic bottles, blister packs, prefilled syringes, parenteral vials and ampuls, prefilled inhalers, pouches, medication tubes, IV containers, glass bottles and jars, closures, labels, secondary containers, prescription containers), world region, and major country. The study also considers market environment factors, examines raw material usage, evaluates company market share and profiles industry players.

#3269.....July 2015.....\$6700

Plastic Film

US demand for plastic film will grow 1.5 percent per year through 2018 to 15.4 billion pounds, valued at \$24.9 billion. Linear low density polyethylene will remain the most common film resin and maintain solid growth, while polypropylene and other resins such as degradable types will outpace it from smaller bases. The food packaging market will exhibit the fastest gains. This study analyzes the 14.3 billion pound US plastic film industry, with forecasts for 2018 and 2023 by resin and market. The study also evaluates company market share and profiles industry players.

#3243.....January 2015.....\$5300

World Labels

World label demand will rise 4.9 percent yearly to 58 billion square meters in 2018, valued at \$114 billion. The Asia/Pacific region will be the fastest growing market, due to the continued rapid expansion of Chinese and Indian label demand. The product mix will continue to shift away from glue-applied paper labels. This study analyzes the 45 billion square meter world label industry, with forecasts for 2018 and 2023 by application method, material, market, world region, and for 19 countries. The study also evaluates company market share and profiles industry participants.

#3185.....August 2014.....\$6300

World Pressure Sensitive Tapes

World demand for pressure sensitive adhesive (PSA) tapes is projected to increase 5.0 percent annually to more than 50 billion square meters in 2018. Growth will remain the fastest in China, India and other rapidly developing countries, while more developed markets such as the US will see accelerating gains. This study analyzes the 39.3 billion square meter world PSA tape industry, with forecasts for 2018 and 2023 by tape type, backing material, world region, and for 22 countries. The study also evaluates company market share and profiles industry competitors.

#3163.....May 2014.....\$6300

About The Freedonia Group

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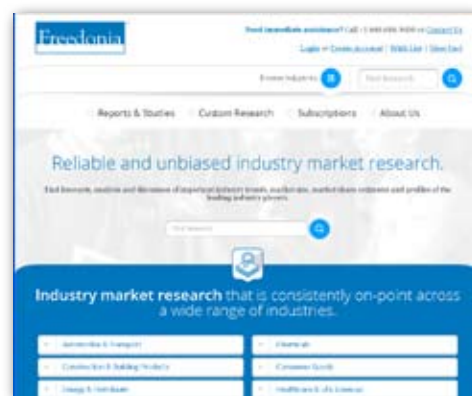
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