

Global Labels Market

Industry Study with Forecasts for 2020 & 2025

Study #3486 | January 2017 | \$6300



Labels are used in most sectors of the global economy, but mainly in primary packaging applications. As a result, label demand tends to track trends in production activity and is particularly sensitive to trends in nondurable goods segments such as food processing, beverage production, chemical manufacturing, and pharmaceutical processing.

Asia/Pacific to post fastest growth

The largest regional label markets are where there is the most manufacturing activity, including North America, Western Europe, and the industrialized portions of the Asia/Pacific region. North America and Western Europe are relatively mature markets and are expected to exhibit modest growth through 2020. In contrast, the Asia/Pacific region is expected to register the fastest growth among regional markets, even as the massive Chinese market's growth slows considerably as its economic growth decelerates. Manufacturing activity is also forecast to grow rapidly in the Africa/Mideast region, leading to above average growth for label demand. Eastern Europe and Central and South America are forecast to post somewhat slower growth, due largely to the anticipated economic underperformance of Russia and Brazil, which are the dominant label markets in their respective regions.

Food & beverage applications largest label markets

Food and beverage processing applications combine to account for about 30 percent of global label demand. The food segment will remain larger, although beverage label growth will be faster. Gains for beverage label demand will be supported by sustained growth in bottled water

production. Bottled water consumption continues to grow in developed markets such as France, Germany, Italy, and the US. However, a number of developing countries -- including Brazil, China, Indonesia, Mexico, and Thailand -- have also become significant bottled water consumers, in part because public water safety is suspect.

Pressure sensitive labels to remain leading type

Pressure sensitive labels have become the most common label format, though glue-applied labels still have a strong presence in several applications, such as beverage packaging. Niche products such as in-mold labels will register strong growth through 2020. Pharmaceutical labels will exhibit the fastest growth among major markets. Robust increases in global drug production will be the primary factor driving growth.

Study coverage

This study examines the global market for labels. It offers historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) in square meters by application method (pressure sensitive, glue-applied, and other -- including sleeves and in-mold), backing material (paper, plastic and other), and market (food, beverages, chemicals, pharmaceuticals, durable goods, other) in 6 regions and 20 major countries. The study also assesses industry structure, evaluates company market share, and offers competitive analysis on industry participants, including Avery Dennison, Brady, CCL Industries, Cenveo, LINTEC, Multi-Color, UPM Raflatac, and WS Packaging.

CONTENTS SUMMARY

Executive Summary

Market Environment

Global Labels Overview

- Global Market Outlook
- Materials & Technologies
- Application Method
 - Pressure Sensitive
 - Glue-Applied
 - Other
 - Sleeve
 - In-Mold
 - All Others
- Materials
 - Paper
 - Plastic & Other
 - Plastic
 - Other
- Markets
 - Food
 - Beverages
 - Chemicals
 - Pharmaceuticals
 - Durable Goods
 - Other

North America

- Economic Overview
- Label Demand by Application Method & Material
- Label Demand by Market
- United States
- Canada
- Mexico

Western Europe

- Economic Overview
- Label Demand by Application Method & Material
- Label Demand by Market
- Germany
- United Kingdom
- France
- Italy
- Spain
- Netherlands
- Other Western Europe

Asia/Pacific

- Economic Overview

- Label Demand by Application Method & Material
- Label Demand by Market
- China
- Japan
- India
- South Korea
- Indonesia
- Taiwan
- Australia
- Other Asia/Pacific

Other Regions

- Central & South America
 - Economic Overview
 - Label Demand by Application Method & Material
 - Label Demand by Market
 - Brazil
 - Other Central & South America
- Eastern Europe
 - Economic Overview
 - Label Demand by Application Method & Material
 - Label Demand by Market
 - Russia
 - Poland
 - Other Eastern Europe
- Africa/Mideast
 - Economic Overview
 - Label Demand by Application Method & Material
 - Label Demand by Market
 - Turkey
 - Other Africa/Mideast

Industry Structure

- Global Label Industry Structure Overview
- Market Share
- Manufacturing
- Marketing & Distribution
- Cooperative Agreements
- Competitive Strategies
- Acquisitions & Divestitures
- List of Industry Participants

TABLES & CHARTS

Executive Summary

- 1 Global Label Demand

Global Labels Overview

- 1 Global Label Demand by Region
- Cht Global Label Demand by Region, 2015
- 2 Global Label Demand by Application Method & Material
- Cht Global Label Demand by Application Method, 2015
- 3 Global Pressure Sensitive Label Demand
- 4 Global Glue-Applied Label Demand by Region
- 5 Global Demand for Other Labels by Region & Type
- 6 Global Paper Label Demand by Region
- 7 Global Plastic & Other Label Demand by Region
- 8 Global Label Demand by Market
- Cht Global Label Demand by Market, 2015
- 9 Global Food Label Demand by Region
- 10 Global Beverage Label Demand by Region
- 11 Global Chemical Label Demand by Region
- 12 Global Pharmaceutical Label Demand by Region
- 13 Global Durable Goods Label Demand by Region
- 14 Global Demand for Labels Used in Other Markets by Region

Tables for each region and/or country:
Selected Label Manufacturing Locations by Country
Label Demand by Application Method & Material
Label Demand by Market
Charts for each major region:
Label Demand by Country, 2015

Industry Structure

- 1 Global Label Sales by Company, 2015
- Cht Global Label Market Share, 2015
- 2 Selected Cooperative Agreements
- 3 Selected CCL Industries Acquisitions & Divestitures
- 4 Selected Multi-Color Acquisitions & Divestitures
- 5 Selected Acquisitions & Divestitures

OTHER REGIONS

Russia: Label Demand by Application Method & Material

Demand for labels in Russia approached 1.4 billion square meters in 2015, representing almost 45 percent of total demand in Eastern Europe. Russia is the largest national market in the region by a wide margin. Demand for labels in the country experienced relatively strong gains during the 2005-2010 period, when overall economic growth was strong. Since then, gains have moderated due to the economic slowdown in the country.

Demand for labels in Russia is expected to continue to grow, but at a slower rate than in the past. Demand for labels in the country is expected to continue to grow, but at a slower rate than in the past. Demand for labels in the country is expected to continue to grow, but at a slower rate than in the past.

Glue-applied labels are expected to continue to cut into pressure sensitive labels' share of the market. Greater capital investment in the labeling sector will stimulate growth for pressure sensitive labels, which are favored for their accuracy and performance benefits in both traditional packaging applications and in emerging uses such as information technology and electronic security labeling. Russia will also see greater use of less developed label application methods such as sleeve and in-mold labels, which will benefit from their superior graphics capabilities designed to catch consumers' eyes.

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Table 6-8 | India: Label Demand by Application Method & Material (million square meters)

Item	2005	2010	2015	2020	2025
Manufacturing Value Added (bil 2014\$)					
m ² labels/000\$ MVA					
Label Demand					
By Application Method:					
Pressure Sensitive					
Glue-Applied					
Other					
By Material:					
Paper					
Plastic & Other					
% India					
Asia/Pacific Label Demand					

Source: The Freedonia Group

Table 5-5 | Germany: Label Demand by Market (million square meters)

Item	2005	2010	2015	2020	2025
Label Demand					
Food					
Beverages					
Chemicals					
Pharmaceuticals					
Durable Goods					
Other Markets					

Source: The Freedonia Group

Table 3-4 | Global Glue-Applied Label Demand by Region (million square meters)

Item	2005	2010	2015	2020	2025
Global Label Demand					
% glue-applied					
Global Glue-Applied Label Demand					
North America:					
United States					
Canada & Mexico					
Western Europe					
Asia/Pacific:					
China					
Japan					
Other Asia/Pacific					
Central & South America					
Eastern Europe					
Africa/Mideast					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Related Studies

Retail E-Commerce Packaging Market in the US

US demand for retail e-commerce packaging is forecast to expand 8.6 percent per year through 2020 to \$3.7 billion. Boxes, labels, and mailers will pose the most rapid growth. The largest market for e-commerce packaging is traditional e-commerce retailers, dominated by Amazon, which accounted for 42 percent of demand in 2015. The study offers historical data plus forecasts for 2020 and 2025 by product, market and application. This study also details the market environment, analyzes the industry structure, and evaluates company market share.

#3472..... November 2016 \$4900

World Pressure Sensitive Tapes

Global demand for pressure sensitive tapes is forecast to rise 4.3 percent yearly to 53.4 billion square meters in 2020. Carton sealing tape will still account for the majority of demand, but specialty tapes will register faster growth. The Asia/Pacific region will still post above average gains. This study assesses the 43.3 billion square meter world pressure sensitive tapes market, with forecasts (2020, 2025) for supply and demand, plus demand by type and material, in 6 regions and 20 countries. The study also evaluates company market share and profiles global players.

#3447..... October 2016 \$6300

Pressure Sensitive Tapes

US demand for pressure sensitive tapes is projected to increase 5.3 percent annually to \$9.3 billion in 2019. Double-sided, masking and adhesive transfer tapes will be the fastest growing major products. The building and construction market will enjoy the most rapid increases. This study analyzes the \$7.2 billion US pressure sensitive tape industry, with forecasts for 2019 and 2024 by material, product and market. The study also considers market environment factors, details raw material usage, and profiles industry competitors.

#3361..... December 2015 \$5300

Labels

US label demand will rise 3.8 percent annually to \$19.7 billion in 2019. In-mold, stretch sleeve and heat-shrink labels will grow the fastest. Digital printing will continue to displace traditional label printing methods. Primary packaging will remain the largest function, while secondary labeling and mailing/shipping labels will pace gains. This study analyzes the \$16.3 billion US label industry, with forecasts for 2019 and 2024 by material, application method, printing technology, and function. The study also evaluates company market share and profiles industry players.

#3291..... June 2015 \$5500

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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