

Labeling Markets North American Market Study & Sourcebook 2013

Market Overview & Opportunities for Labelstock Producers, Material Suppliers, and all Companies Involved in the Product Decoration & Identification Market

AWA Alexander Watson Associates

Koningin Wilhelminaplein 13 2.10.03 (Tower 2, Floor 10, Suite 3) PO Box 69035 1060 CA Amsterdam The Netherlands

Tel: +31 20 676 2069 Fax: +31 20 820 8633 Email: reports@awa-bv.com Web: www.awa-bv.com **AWA North American Office** 910 N Lakeshore Drive

2415 Chicago, IL 60611 USA

Tel: +1 312 943 4091 Email: reports@awa-bv.com Web: www.awa-bv.com Since 1980, AWA has regularly published comprehensive reports on label and product decoration markets, defining regional and application opportunities for all labeling formats. Labeling Markets North American Market Study & Sourcebook 2013 is the fourth assessment of the current status of one of the world's leading regional label markets.

This report will include up to date information and data relating to this leading regional market for 2012. AWA's long standing involvement in the specialist labeling and converting market sectors allows for the presentation of the of the most accurate and timely information available through any source.

Labeling Markets North American Market Study & Sourcebook 2013 details trends in the North American market by label format, material, and technology, with particular emphasis on the changing structure and developments within this key business area. The report focuses on materials, conversion technologies, application methods, and end uses for all label formats, and on their markets.

Labeling Markets: North American Market Study & Sourcebook 2013 details the four main labeling technologies — pressure-sensitive, glue applied, sleeving, and in-mold — and includes forecast growth for each. The North American label market is segmented by application category, end-use market, and regional geographical market. The value chain tool is used to analyze the North American label market for each label technology.

AWA studies provide a strong understanding of the supply end of the value chain. This makes them invaluable for labelstock producers, material suppliers, and companies from further along the value chain who want to get an understanding of the industry.

Research for this study is based on our internal database of label market information, a review of available published literature, an analysis of trade and industry statistics, and interviews with companies across the value chain, together with input from AWA industry conferences and events specific to the label and specialist converting industries.

COST

Labeling Markets North American Market Study & Sourcebook 2013 is scheduled for publication in Q2 2013.

The price of a hard copy or a pdf is US\$4,800/€3,800. Additional copies (whether hard copy or pdf) are available at US\$250/€200 each. The cost of a corporate site PDF license is US\$7,200/€5,700.

There is a US\$85/€60 charge for handling and processing. If express or overnight delivery for a hard copy is required, this will be provided and charged additionally at cost.

AWA Alexander Watson Associates

AWA is an international publishing and market research company whose specialization and expertise in the labeling market extends over many years and provides a unique database of marketing information. AWA also provides marketing advisory services and the possibility for tailored research.

WHAT OUR CUSTOMERS SAY;

'The report was extremely useful; it matched the information provided by other agencies, but overall the AWA report was much better'

'We generally like the report format, it's well structured and logical'

'AWA is a well-known company, especially in the release liner and labeling industry'

AWA reports are great - they help us a lot'

'AWA's market knowledge and reputation of understanding the market are the main reasons for choosing AWA: you are the only show in town'

'AWA is found to be a good source'

TABLE OF CONTENTS*

1. INTRODUCTION

1.1 INTRODUCTION
1.2 METHODOLOGY
1.3 DEFINITIONS

2.EXECUTIVE SUMMARY

3. GLOBAL LABEL MARKETS

3.1 PRODUCT DECORATION & IDENTIFICATION TECHNOLOGIES
3.2 GLOBAL LABEL MARKET

4.NORTH AMERICAN LABEL MARKET

4.1 MARKET SIZE - NORTH AMERICA

4.2 LABELING MARKET VALUE CHAIN & SEGMENTATION

4.2.1 NORTH AMERICAN LABEL MARKET VALUE CHAIN

4.2.2 NORTH AMERICAN LABEL MARKET SEGMENTATION

4.2.2.1 SEGMENTATION BY APPLICATION CATEGORY

4.2.2.2 SEGMENTATION BY END USE MARKET

4.2.2.3NORTH AMERICAN LABEL MARKET – GEOGRAPHICAL SEGMENTATION

5. PRESSURE-SENSITIVE LABEL MARKETS

5.1 PRESSURE-SENSITIVE LABELING

5.2 MARKET STRUCTURE & VALUE CHAIN

5.2.1 MARKET STRUCTURE

5.2.2 PRESSURE-SENSITIVE LABEL MARKET VALUE CHAIN

5.3 PRESSURE-SENSITIVE LABEL MARKETS

5.3.1 APPLICATION SEGMENTATION

5.3.1.1 VIP LABEL MARKET

5.3.1.2 PRIMARY PRODUCT LABEL MARKET

5.3.1.3 FUNCTIONAL/ SECURITY LABEL MARKET

5.3.1.4 PROMOTIONAL LABEL MARKET

5.3.2 END-USER MARKET SEGMENTS

5.3.3 REGIONAL MARKET USAGE

5.4 FACE MATERIALS

5.4.1 PAPER FACE STOCK MATERIAL — TYPES & PRODUCERS

5.4.2 FILM AND SPECIALTY FACE STOCK MATERIAL — TYPES &

PRODUCERS

5.4.3 ADHESIVES & RELEASE LINER

5.5 PRESSURE-SENSITIVE LABEL MARKET TRENDS

6. GLUE APPLIED LABEL MARKETS

6.1 GLUE APPLIED LABELING

6.2 MARKET STRUCTURE & VALUE CHAIN

6.2.1 MARKET STRUCTURE

6.2.2 GLUE APPLIED LABEL MARKET VALUE CHAIN

6.3 NORTH AMERICAN GLUE APPLIED LABEL MARKETS

6.3.1 APPLICATION TECHNOLOGY

6.3.2 APPLICATION SEGMENTATION

6.3.3 END-USER MARKET SEGMENTS

6.3.4 REGIONAL MARKET USAGE

6.4 GLUE APPLIED LABEL MATERIAL TRENDS

7. SLEEVE LABEL MARKETS

7.1 SLEEVE LABELING

7.2 NORTH AMERICAN SLEEVE LABEL MARKET

7.3 SLEEVE LABEL TECHNOLOGIES

7.3.1 HEAT SHRINK SLEEVE LABELS

7.3.2 STRETCH SLEEVE LABELS

7.3.3 ROLL-ON-SHRINK-ON (ROSO™) LABELS

7.4 SUMMARIZED VALUE CHAIN - SLEEVE LABEL MARKETS

8.IN-MOLD LABEL MARKETS

8.1 IN-MOLD LABELS

8.2 NORTH AMERICAN IN-MOLD LABEL MARKETS

8.3 IN-MOLD LABEL MARKET STRUCTURE

8.4 VALUE CHAIN

8.5 IN-MOLD LABEL MARKET SEGMENTATION

8.5.1 APPLICATION TECHNOLOGY

8.5.2 APPLICATION CATEGORIES

8.5.3 END-USE SEGMENTS

8.6 NORTH AMERICAN IN-MOLD LABEL MATERIALS

8.7 NORTH AMERICAN IN-MOLD LABEL MARKET – TRENDS & FORECASTS

9. OTHER LABELING TECHNOLOGIES

10. LABELING TRENDS

10.1 LABEL MARKET TRENDS

10.2 KEY MACRO DEMAND INFLUENCES & MARKET DRIVERS

10.3 PRINT TECHNOLOGY TRENDS

10.4 RAW MATERIAL PRICES

10.5 ENVIRONMENTAL ISSUES

11.COMPANY DIRECTORY

11.1LEADING PAPER SUPPLIERS

11.2 LEADING FILM SUPPLIERS

11.3 PRESSURE-SENSITIVE LAMINATE PRODUCERS

11.4 DIE-CUTTING

11.5 ADHESIVES PRODUCERS

11.6 PRESS MANUFACTURERS

11.7 INK SUPPLIERS

11.8 STAMPING FOILS

12. APPENDIX

I KEY TRADE ASSOCIATIONS

* PRELIMINARY

Order Form Labeling Markets North American Market Study & Sourcebook 2013

Please complete this form and fax it to AWA Alexander Watson Associates at +31 20 820 8633

		r icase seria me	••
COPY	US\$4,800/€3,800	PDF	Hard Copy
ADDITIONAL COPY	US\$250/€200 EACH	PDF	Hard Copy
CORPORATE SITE PDF LICENSE	US\$7,200/€5,700	PDF	
HANDLING & PROCESSING CHARGE	US\$85/€60	_	
Invoice in:		US dollars	Euros
Name			
Job Title			
Company			
Address			
Postcode			
Country			
VAT # (EU only)			
Phone			
Fax			
Email			
Signature			
Date		_	1 / / /
Remarks			LA L
	Iban: NL 16 INGB 0664 032	red to bank account 29 23, Swift (BIC): ING	t number ING 66 40 32 923, GBNL2A by credit card are subject to a 7% surcharge) Visa
Card Number			
CVC Code			
Expiry Date			
Name of Cardholder			
Address of Cardholder			
Signature			