

Global Pressure-sensitive Graphic Arts Film Market Study 2013

Up-to-date Market Overview & Opportunities for converters and material suppliers in the pressure-sensitive graphic arts film 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 Email: reports@awa-bv.com Web: www.awa-bv.com Founded in 1971, AWA Alexander Watson Associates BV as a leading international market research and marketing advisory services provider regularly publishes and updates a series of comprehensive reports on areas of specialist converting including label and product decoration markets, specialist coatings, tapes and graphic arts defining countrywide, regional, and application opportunities.

Global Pressure-sensitive Graphic Arts Film Market Study 2013 is the first global assessment conducted by AWA of the status of the graphic arts market, following our regional studies on the graphic arts markets in Europe and North Ameria. It provides a current market overview and highlights trends and opportunities for converters and material suppliers.

The report covers the structure of the industry with particular reference to material suppliers and pressure-sensitive laminators. The global market and regional markets are segmented by material type and by application segment. Suppliers and converters at all levels of the value chain can benefit from this up-to-date, focused analysis of the trends and developments taking place.

Scope of the report

The emphasis of this study is on pressure-sensitive laminates used for graphic arts applications. It does not include laminates for overlamination or mounting, paper laminates, or non-adhesive materials like banners, paper, canvas etc.

Methodology

Our methodology includes research of available published literature, an analysis of trade and industry statistics complemented by strong primary research. The primary research and data collection involved in this study included a mix of personal interviews and telephone and e-mail interviews of leading global and regional graphic arts manufacturers, raw materials suppliers, end users, and industry experts.

PRICE

Global Pressure-sensitive Graphic Arts Film Market Study 2013 was published in July 2013.

The regular price of the report is €3,800/US\$4,800 (hard copy or pdf)
Additional copies (hard copy or pdf) are available at €200/US\$250 each.
The price for a corporate site PDF license is €5,700/US\$7,200.
There is a €60/\$85 charge for handling and processing.

AWA ALEXANDER WATSON ASSOCIATES

AWAisaninternational 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.

TABLE OF CONTENTS

1. INTRODUCTION

1.1 INTRODUCTION1.2 METHODOLOGY1.3 DEFINITIONS

2. EXECUTIVE SUMMARY

3. GLOBAL MARKET STRUCTURE AND VALUE CHAIN

- 3.1 RAW MATERIAL SUPPLIERS
- 3.2 PRESSURE-SENSITIVE LAMINATORS
- 3.3 DISTRIBUTION & CONVERTING
- 3.4 VALUE CHAIN

4. GLOBAL DEMAND FOR PRESSURE-SENSITIVE FILM GRAPHIC ARTS MATERIALS

- 4.1 OVERALL MARKET SIZE
- 4.2 GEOGRAPHIC BREAKOUT
- 4.3 BREAKOUT BY END-USE MARKET SEGMENTS
- 4.4 BREAKOUT BY FILM MATERIAL USAGE
- 4.5 KEY DEMAND INFLUENCES AND MARKET DRIVERS
- 4.6 MARKET TRENDS AND CHARACTERISTICS

5. REGIONAL DEMAND FOR PRESSURE-SENSITIVE FILM GRAPHIC ARTS MATERIALS

- 5.1 NORTH AMERICAN MARKET
- 5.1.1 OVERALL MARKET SIZE
- 5.1.2 BREAKOUT BY END-USE MARKET SEGMENTS
- 5.1.3 BREAKOUT BY FILM MATERIAL USAGE
- 5.1.4 KEY DEMAND INFLUENCES AND REGIONAL DRIVERS
- 5.1.5 REGIONAL TRENDS AND CHARACTERISTICS
- 5.2 EUROPEAN MARKET
- 5.2.1 OVERALL MARKET SIZE
- 5.2.2 BREAKOUT BY END-USE MARKET SEGMENTS
- 5.2.3 BREAKOUT BY FILM MATERIAL USAGE
- 5.2.4 KEY DEMAND INFLUENCES AND REGIONAL DRIVERS
- 5.2.5 REGIONAL TRENDS AND CHARACTERISTICS
- 5.3 ASIA PACIFIC MARKET
- 5.3.1 OVERALL MARKET SIZE
- 5.3.2 BREAKOUT BY END-USE MARKET SEGMENTS
- 5.3.3 BREAKOUT BY FILM MATERIAL USAGE
- 5.3.4 KEY DEMAND INFLUENCES AND REGIONAL DRIVERS
- 5.3.5 REGIONAL TRENDS AND CHARACTERISTICS
- 5.4 SOUTH AMERICAN MARKET
- 5.4.1 OVERALL MARKET SIZE
- 5.4.2 BREAKOUT BY END-USE MARKET SEGMENTS
- 5.4.3 BREAKOUT BY FILM MATERIAL USAGE
- 5.4.4 KEY DEMAND INFLUENCES AND REGIONAL DRIVERS
- 5.4.5 REGIONAL TRENDS AND CHARACTERISTICS

6. PRINTING & CONVERTING TECHNOLOGY

- 6.1 OFFSET PRINTING
- 6.2 SCREEN PRINTING
- 6.3 COMPUTER CUTTING
- 6.4 DIGITAL PRINTING
- 6.4.1 WIDE-FORMAT INKJET TECHNOLOGY
- 6.4.1.1 AQUEOUS INKJET
- 6.4.1.2 SOLVENT-BASED INKJET
- 6.4.1.3 UV INKJET
- 6.4.1.4 FLATBED INKJET
- 6.4.2 THERMAL TRANSFER PRINTING
- 6.4.3 ELECTROSTATIC PRINTING
- 6.5 FUTURE OUTLOOK

7. MATERIAL TRENDS

- 7.1 FILM
- 7.1.1 CAST VINYL FILM
- 7.1.2 CALENDERED VINYL FILM
- 7.1.3 ENGINEERED FILMS
- 7.1.4 OTHER FILMS
- 7.2 ADHESIVES
- 7.3 RELEASE LINER
- 7.4 RAW MATERIAL PRICE TRENDS

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'

Global Pressure-sensitive Graphic Arts Film Market Study 2013

Order your copy online at www.awa-bv.com

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

I would like to order: **COPY** PDF US\$4,800/€3,800 **Hard Copy ADDITIONAL COPY** US\$250/€200 EACH **PDF Hard Copy PDF** CORPORATE SITE PDF LICENSE US\$7,200/€5,700 HANDLING & PROCESSING CHARGE US\$85/€60 **US** dollars Euros Invoice in: Name Job Title Company **Address** Postcode Country VAT # (NL only) Phone Fax **Email** Signature Date Remarks Please send an invoice to the address above Payment is enclosed Payment has been transfered to bank account number ING 66 40 32 923, Iban: NL 16 INGB 0664 0329 23, Swift (BIC): INGBNL2A Payment will be made by credit card (payments by credit card are subject to a 7% surcharge) Amex Visa Eurocard **Card Number CVC Code Expiry Date** Name of Cardholder Address of Cardholder Signature