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This study will benefit:

- ◆ Film and resin producers looking for markets for new materials
- ◆ Converters trying to meet growing end-user needs
- ◆ End-users needing to understand materials options for labels

Exhaustive coverage includes:

- ◆ Key Trends
- ◆ Growth projections
- ◆ Applications
- ◆ Materials
- ◆ Key Profiles

An exclusive update to
Opportunities in
Shrink Film Labels
for Bottles



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Executive Summary

Overview

Environmental Issues

- Regulation & legislation
- Recycling issues for labels

Consumer & Marketing Issues

- Purchase influence
- Information & Education

Governmental

- Label formats
- Information requirements

Market

- Relevant overseas trends and applications
- Lifestyle and demographic influences

Markets

Beverages

- Fruit juices & juice drinks
- Milk
- Ready-to-drink (RTD) tea
- Water
- Ground coffee
- Sports & energy drinks
- Powdered drinks
- Wine
- Yogurt & other dairy
- Beer
- Carbonated soft drinks (CSD)
- Ready-to-drink (RTD) coffee
- Electrolytes
- Liquor

Food

- Creamers & other wide-mouth bottles
- Ketchup & other narrow neck Bottles
- Snacks
- Dietary products

Consumer/industrial

- Pharmaceutical & vitamins
- Personal care
- Aerosol cans
- Propane tanks
- Other (chemical, automotive, batteries, etc.)

Major customers

- Company & location
- Key contacts
- Sales
- Brands
- Key Suppliers

Consumption of Bottles & Labels
Active efforts to evaluate label materials & suppliers

Major customers include:

Arizona Beverages, Dean Foods, Kraft Foods, Pepsi (Gatorade, Tropicana), Procter & Gamble, SC Johnson, Snapple Beverage, Nestle USA, Clearly Canadian, Johnson & Johnson, GlaxoSmithKline, Shamrock, Unilever, Smith's Dairy, United Distillers & Vintners, Austin Nichols, M&M/Mars, Ross Products, Group Danone, Land O' Lakes, Constellation Brands, E & J Gallo & many others

Requirements & Specifications

*Appearance
Performance
Application equipment*

Materials (films & other substrates)

Production & Pricing

Label types
Orientation
Pricing

Films

Polyvinyl chloride (PVC)
Polyethylene terephthalate glycol (PETG)
Polyethylene for stretch films (PE)
Oriented polypropylene (OPP)
Oriented polystyrene (OPS)
Oriented polyethylene terephthalate (PET)

Key player profiles

Film & Material suppliers

AET Films, Bonset, Eastman, ExxonMobil Klöckner, Mitsubishi, Alcoa/Kama, Plastic Suppliers, SKC

Label converters

Alcan (Lawson Mardon), Alcoa (Reynolds), American Fuji Seal, CCL Shrink, CL & D Graphics, Ft. Dearborn, Gilbreth, Halpak, Multi-Color Uniflex, Seal-It, SleeveCo, Inc., Sleever Int'l, Salem Label & many others.

Equipment makers

Axon, B&H, DCM, Intersleeve, Karlville, Kronos, PDC, Trine.

Scope

The market in the United States and Canada for shrink film labels for bottles and other objects. Two major types of shrink labels are covered: Cap Sealing, Body Sleeves and Wraparound. Conventional prime labels will not be covered, although comparisons and approximate market size by segment for these labels will be identified where an opportunity for shrink labels exists.

Within each market the study will cover:

Size & growth (2002-2007)
Bottle units
Label Tonnage & Area (MSI) by type
Key trends for market growth
Overall Market Segment Growth
Bottle material conversions
Label material conversions

Within each material the study will cover:

Label area (MSI) and tonnage by market area & type
Key properties, advantages & disadvantages
Inks used (UV, solvent, water-base)
Adhesion/Surface preparation required (corona, priming, etc.)
Machinability, durability, graphics
Selling prices
Key producers

Methodology

The study will be based on extensive review of existing data and primary interviews. Sources include trade journals, published studies (including *Opportunities in Shrink Film Labels for Bottles*), relevant information from subscribers and Keymark files not accessible on public databases. Interviews will be conducted with managers and executives, primarily in marketing and technical areas, from over 100 key companies, including key film and substrate producers, label converters, blow molders, glass bottle makers and end-users such as CSD bottlers, CSD companies, other beverages such as sports drinks, tea, beer, liquor, juice and dairy, packagers of food and other products.

Consultant Qualifications

Keymark Associates consults extensively with major chemical firms and converters in flexible and rigid packaging to help them identify and develop new products, businesses and markets. Keymark has conducted a broad range of studies in rigid and flexible packaging, including:

- ◆ Barrier Films & Resins for Food Packaging
- ◆ *Oxygen Absorbers – Hit or Hype?*
- ◆ Nylon Film Markets in North America & Europe
- ◆ *Case Ready Red Meat Packaging Systems*
- ◆ *North American Flexible Packaging Strategies 2002*
- ◆ Oriented Film Pricing & Economics
- ◆ Barrier Sheet & Trays Market & Economics
- ◆ Opportunities for Hot-Filled Foods Packaging

Lead Consultant: Huston Keith, MBA, principal of Keymark Associates, 26 years professional market research experience with Amoco, General Electric and Holiday Inns.

Associate: Sharon Derbyshire, MBA, Free lance market researcher focused on the packaging industry, 21 years professional marketing & technical experience as a consultant and with Amoco, Dow and Burger King.

Associate: Gary Gates, consultant to labeling industry and President Emeritus, Gates Packaging, a shrink label distributor.

