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Pressure Sensitive Labels Market - Global Outlook and Forecast 2020-2025

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Abstracts

The global pressure sensitive labels market by revenue is expected to grow at a CAGR of over 3% during the period 2019–2025.

The following factors are likely to contribute to the growth of the pressure sensitive labels market during the forecast period:

Direct Digital Printing Packaging on Rigid Containers

Recycling Challenges with Release Liners

High-volume Demand from Food & Beverages

The pressure sensitive labels market is expected to observe significant growth on account of convenience and effective functionalities they offer. The PSL labels market is in the strong growth stage as the demand from the food and beverage industry is significantly high. The performance of this industry has been encouraging across the world. The increase in disposable incomes and the growth in the population have been driving the food and beverage industry. The pressure sensitive labels application includes the F&B sector, which occupies more than 40%, and is expected to hold the dominant position during the forecast period. The rise in the consumption of packaged food has led to a high demand for packaging products that are easy to use and have an easy printing surface to enable product differentiation on shelves. Alcoholic beverages are mainly packed in glass bottles and require primary premium pressure sensitive labels and have been a steady volume generator for the market. The rise in per capita income and the increase in the purchasing power are aiding the growth of beverages, which, subsequently, is increasing the demand.

The study considers the present scenario of the pressure sensitive labels market and dynamics for the period 2019?2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report covers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent companies operating in the market.

Pressure Sensitive Labels Market: Segmentation

The market research report includes detailed segmentation by labelstock, label, product, printing, end-users, adhesive, and geography. Paper-based substrates are cost-effective and offer a range of applications in several sectors. The increasing application of paper-based packaging in logistics, food, and retail industries is a major driver for the growth of the segment. Papers provide a high-quality print and offer the flexibility of adding information at a later stage. Gloss, semi-gloss, and metallic papers are finding increasing application in the gift and luxury packaging industry, hence increasing business opportunities.

As plastic or film-based label prices are higher than paper-based ones, the demand is limited. Converters engage with large plastic suppliers to leverage the bargaining power as plastic prices are volatile. However, the growing pressure on companies to reduce plastic usage and the challenges related to recycling and disposal is decreasing the market share of the segment. Geographically, Europe and APAC lead the plastic-based labelstock market as the end-users have a high purchasing power. However, Europe is likely to exhibit strong growth during the forecast period due to the demand for luxury goods packaging.

Variable Information Print (VIP) labels, which are also known as thermal labels, are one of the fastest-growing segments in the market. They are made from either paper or film-based facestock materials, hence widely used in diverse end-use sectors. Their applications in logistics, weighing appliances, warehousing, medical and pharmaceutical, point of purchase, and transportation is growing.

The linered segment holds over 90% volume share in the PSL labels market. Conventional pressure sensitive labels have release liners, which permit a precise and high-speed label application. However, the increased focus on recyclability and disposal of release liners is a challenge for the growth of the segment. Linerless pressure sensitive labels, on the other hand, have gained prominence in recent years on account of sustainability and cost-efficiency. However, the linerless segment share is low as they are not as effective as linered ones.

The importance of PSLs has been accepted across the packaging industry, as they play an important role in sales and packaging. A relatively low cost of flexographic plates and the ease of plate changeovers make flexography printing a preferred choice for high-quality graphic and low to medium volume label production. Hence, the increasing preference for flexographic label printing among vendors for longer production runs is influencing the segment growth.

Gravure printing technology is less intricate than flexographic printing and offsets printing since the ink is positioned on the surface. This method is useful as the ink consistency, and print quality is generally high. Although the printing cost is high, gravure printing enables manufacturers to print many intricate labels.

The increase in the number of quick-service restaurants and retail outlets is fueling food consumption, thereby increasing the use of package labels. In terms of geography, the food industry has witnessed tremendous growth in China, India, and other Southeast Asian countries, thereby aiding the growth of packaging in APAC.

Packaging constitutes an important part of the medical devices industry as regulatory agencies strongly monitor it. Although the linered segment have a higher share in the market, the need for cost reduction is increasing the demand for linerless ones. VIP and primary product segment holds a share of over 60%, with North America leading the market.

The cosmetics industry is expected to have a positive influence on the pressure sensitive labeling market. South America, APAC, and MEA are likely to witness a significant growth rate during the forecast period due to their growing population, increasing per capita income, and expanding retail stores.

The demand for general pressure sensitive labels with emulsion-based one is the highest. The presence of several properties such as moisture resistance, anti-microbial features, the power to withstand extreme temperatures is likely to influence the segment growth. UV-based adhesives have several advantages. However, legacy adhesives such as solvents and emulsions offer far superior performance at a low cost; hence they are expected to hold major shares in the market. Although solution-based PSLs offer excellent chemical and heat resistance, they have a high production cost.

Market Segmentation by Labelstocks

Paper

Plastic

Others

Market Segmentation by Labels

VIP

Prime

Functional & Security

Promotional

Market Segmentation by Products

Linered

Linerless

Market Segmentation by Printing

Flexographic

Gravure

Market Segmentation by End-users

Food & Beverages

Healthcare

Personal Care

Others

Market Segmentation by Adhesive

Emulsion

Solutions

Hot Melt

UV Cured

Insights by Geography

China dominates the APAC region as the country has a growing middle-class population with high disposable income. The lack of stringent norms concerning recycling and disposing of is aiding the growth of plastic-based labels. However, Japan, South Korea, Australia, and Singapore are exceptions as the regulatory environment is strong in these countries. The growth in retail and FMCG industries in the region has contributed immensely in recent years.

The highly developed retail market in Europe is increasing the demand for better print technology to differentiate products. Supermarkets in Europe, especially in Western Europe, are expanding at a faster pace. Globally, Germany has the highest number of supermarkets, followed by the US and the UK. Sustainability concerns are expected to impact the linered label segment in the latter half of the forecast period. However, the recycling and disposal challenges of plastic labelstock is a major hinderance for the growth of the industry.

North America is a major market with several key vendors and suppliers having their bases in the region. North America hosts highly developed industries such as retail and CPG, which require robust pressure sensitive labels. Automotive, healthcare, electronics & semiconductors sectors are the key end-users, which are exhibiting high growth potential. The share of labels in these industries is expected to grow further

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during the forecast period.

Market Segmentation Geography

- APAC
  - China
  - Japan
  - Australia
  - South Korea
  - India
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Spain
- North America
  - US
  - Canada
- MEA
  - South Africa
  - Saudi Arabia

Turkey

Egypt

UAE

Latin America

Brazil

Mexico

Argentina

Chile

Key Vendor Analysis

The pressure sensitive labels market is highly fragmented. The trend of advanced packaging features is growing. The need for brands to stand out in crowded retail shelves and ensure the safety and security of their products has opened up the functional and security segments, where the competition is expected to heat up. However, anti-counterfeiting technology is still at an embryonic stage in many countries with demand for anti-counterfeit labels few and far. The industry is characterized by a large number of organized and unorganized players. The market consists of both pure-play printers and large packaging companies having labeling verticals. The APAC market consists of many standalone printer converters, while the vendors with packaging and labeling verticals have a significant presence in Europe and North America.

Key Profiles of Supply Chain Participants (Suppliers And Converters)

Avery Dennison

UPM Raflatac

Lintec

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CCL Industries

MCC Labels

Other Prominent Supply Chain Participants –

Inland Label

Mondi

3M

Coveris

Ceneveo

Arconver

Henkel

Huhtamaki

Autajon

Skanem

Zircon Technologies

HB Fuller

Torraspapel (Lecta Group)

All4Labels

Schreiner

Asia Paper

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Pulp Group

Key Market Insights

The analysis of the pressure sensitive labels market provides sizing and growth opportunities for the forecast period 2020–2025.

Offers sizing and growth prospects of the market for the forecast period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.

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