

Table of Contents

1.	INTRODUCTION	5
1.1	Introduction	6
1.2	Methodology	9
1.3	Definitions	12
1.4	Acknowledgements	20
2.	EXECUTIVE SUMMARY	21
3.	LABEL MARKETS	29
3.1	Product Decoration & Identification Technologies	30
3.2	Global Label Market	34
3.3	Sleeve Label Technologies & Global Markets	37
4.	HEAT SHRINK SLEEVE LABEL MARKETS	45
4.1	Heat Shrink Sleeve Labeling	47
4.2	Heat Shrink Sleeve Label Market Structure	54
4.3	Heat Shrink Sleeve Label Markets	62
4.3.1	Global Heat Shrink Sleeve Label Market	63
4.3.2	European Heat Shrink Sleeve Label Market	71
4.3.3	North American Heat Shrink Sleeve Label Market	78
4.3.4	Asian Heat Shrink Sleeve Label Market	86
4.3.5	South American Heat Shrink Sleeve Label Market	95
4.3.6	Other Heat Shrink Sleeve Label Markets	101
5.	STRETCH SLEEVE LABEL MARKETS	102
5.1	Stretch Sleeve Labeling	104
5.2	Stretch Sleeve Label Market Structure	108
5.3	Stretch Sleeve Label Markets	112
5.3.1	Global Stretch Sleeve Label Market	112
5.3.2	European Stretch Sleeve Label Market	118
5.3.3	North American Stretch Sleeve Label Market	121
5.3.4	Asian Stretch Sleeve Label Market	123
5.3.5	South American Stretch Sleeve Label Market	124
6.	RFS/ROSO™/MD SLEEVE LABEL MARKETS	126
6.1	RFS/ROSO™/MD Sleeve Labeling	129
6.2	RFS/ROSO™/MD Sleeve Label Market Structure	134
6.3	RFS/ROSO™/MD Sleeve Label Markets	138
6.3.1	Global RFS/ROSO™/MD Sleeve Label Market	138
6.3.2	European RFS/ROSO™/MD Sleeve Label Market	144
6.3.3	North American RFS/ROSO™/MD Sleeve Label Market	145
6.3.4	Asian RFS/ROSO™/MD Sleeve Label Market	147
6.3.5	South American RFS/ROSO™/MD Sleeve Label Market	149

Table of Contents (Cont'd)

7.	TECHNOLOGY TRENDS	151
7.1	Sleeve Label Materials	153
7.1.1	Heat Shrink Sleeve Label Materials	155
7.1.1.1	PVC	156
7.1.1.2	PET-G	159
7.1.1.3	OPS	161
7.1.1.4	PLA	165
7.1.1.5	Hybrid Films	166
7.1.1.6	Heat Shrink Sleeve Label Material Selection	168
7.1.2	Stretch Sleeve Label Materials	174
7.1.3	RFS/ROSO™/MD Label Materials	174
7.2	Sleeve Label Printing and Conversion	178
7.2.1	Printing	178
7.2.1.1	Heat Shrink Sleeve Label Printing Technologies	179
7.2.1.2	Stretch Sleeve Printing Technologies	184
7.2.1.3	RFS/ROSO™/MD Sleeve Label Printing Technologies	184
7.2.2	Seaming / Seam Inspection	184
8.	THE FUTURE FOR SLEEVE LABELING	186
8.1	Market Trends and Forecasts	187
8.2	Sustainability / Environmental Impact	194
8.2.1	Sustainability	194
8.2.2	Environmental Impact	195
8.2.3	Recycling / Re-use	196
8.2.4	Down-gauging of Label Films / Container Wall Reduction	198
8.2.5	General Impacts	200
8.3	Globalization	203
8.4	Summary	205
9.	DIRECTORY	206
9.1	Printers	207
9.2	Labeling Machines	212
9.3	Films / Inks / Resins / Adhesives	214