



INTERNATIONAL PANORAMA OF THE SELF-ADHESIVE LABEL INDUSTRY

Jules Lejeune
FINAT Managing Director

AGENDA



1. Intro
2. About FINAT
3. Trends and developments
4. Concluding remarks



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- 2. About FINAT**
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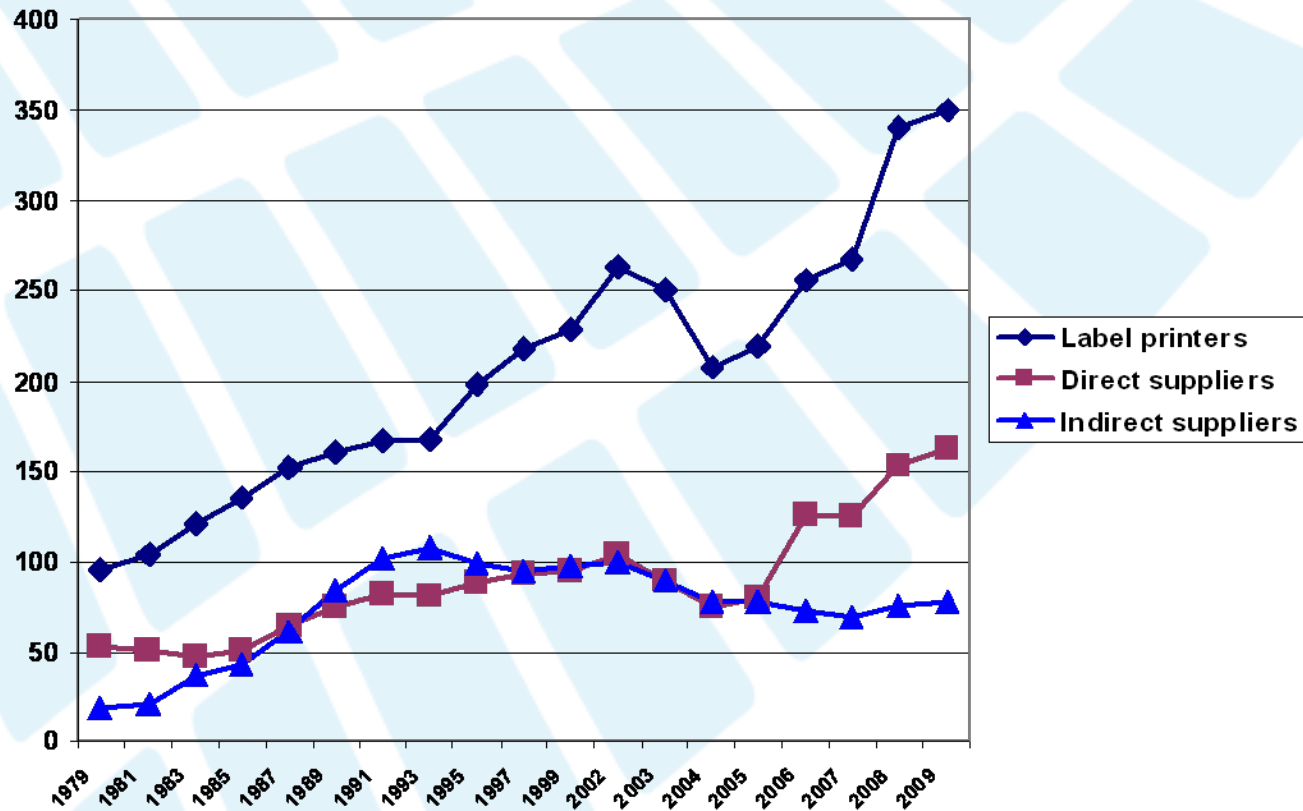
About FINAT

Established on 7th November 1958
in Paris

'**F**édération **I**nternationale des fabricants et transformateurs d'**A**dhésifs et **T**hermocollants sur papiers et autres supports',

'**World-wide association for self-adhesive labels and related products'**

FINAT MEMBERSHIP DEVELOPMENT 1979 - 2009



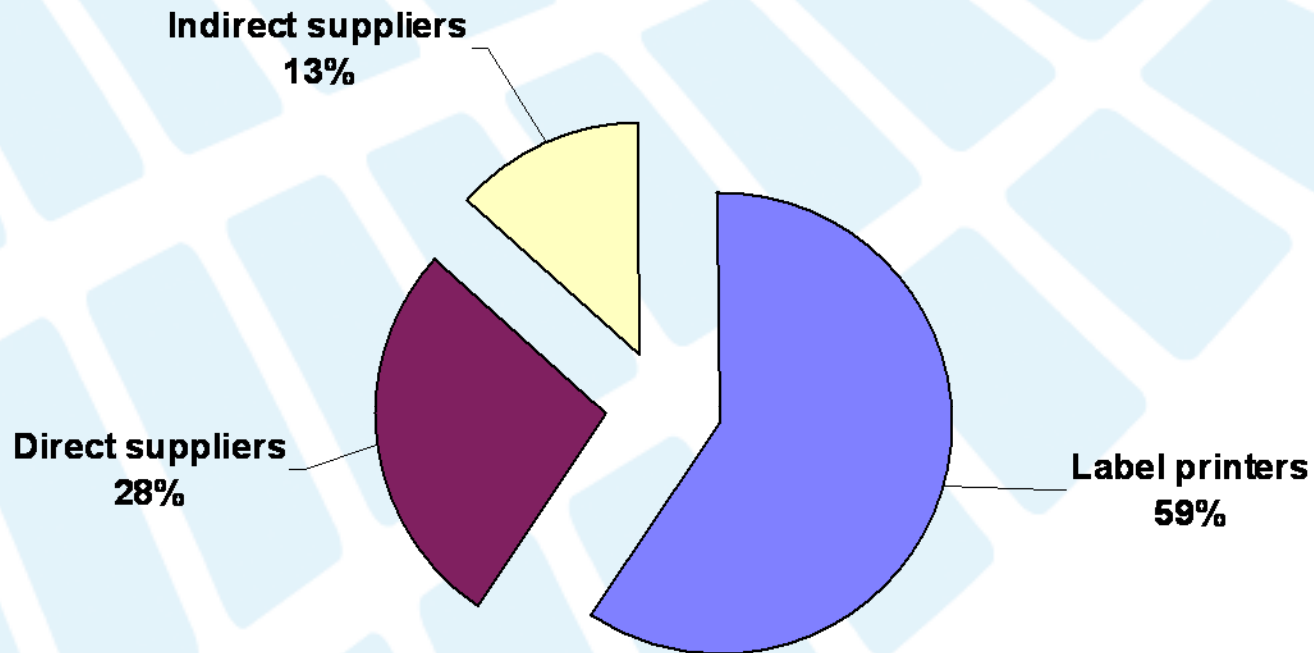
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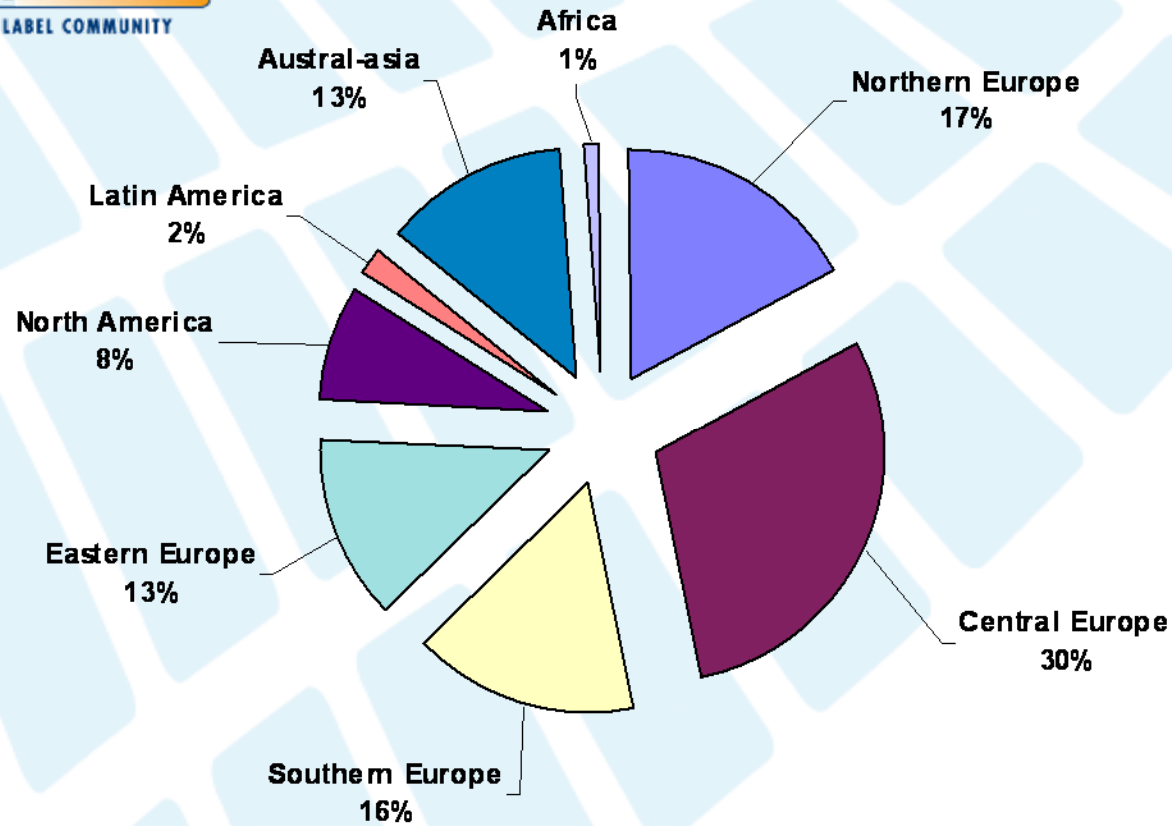


Membership by categories





Membership by regions



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Members of FINAT worldwide and affiliated label associations in Europe and overseas

Affiliated label associations:

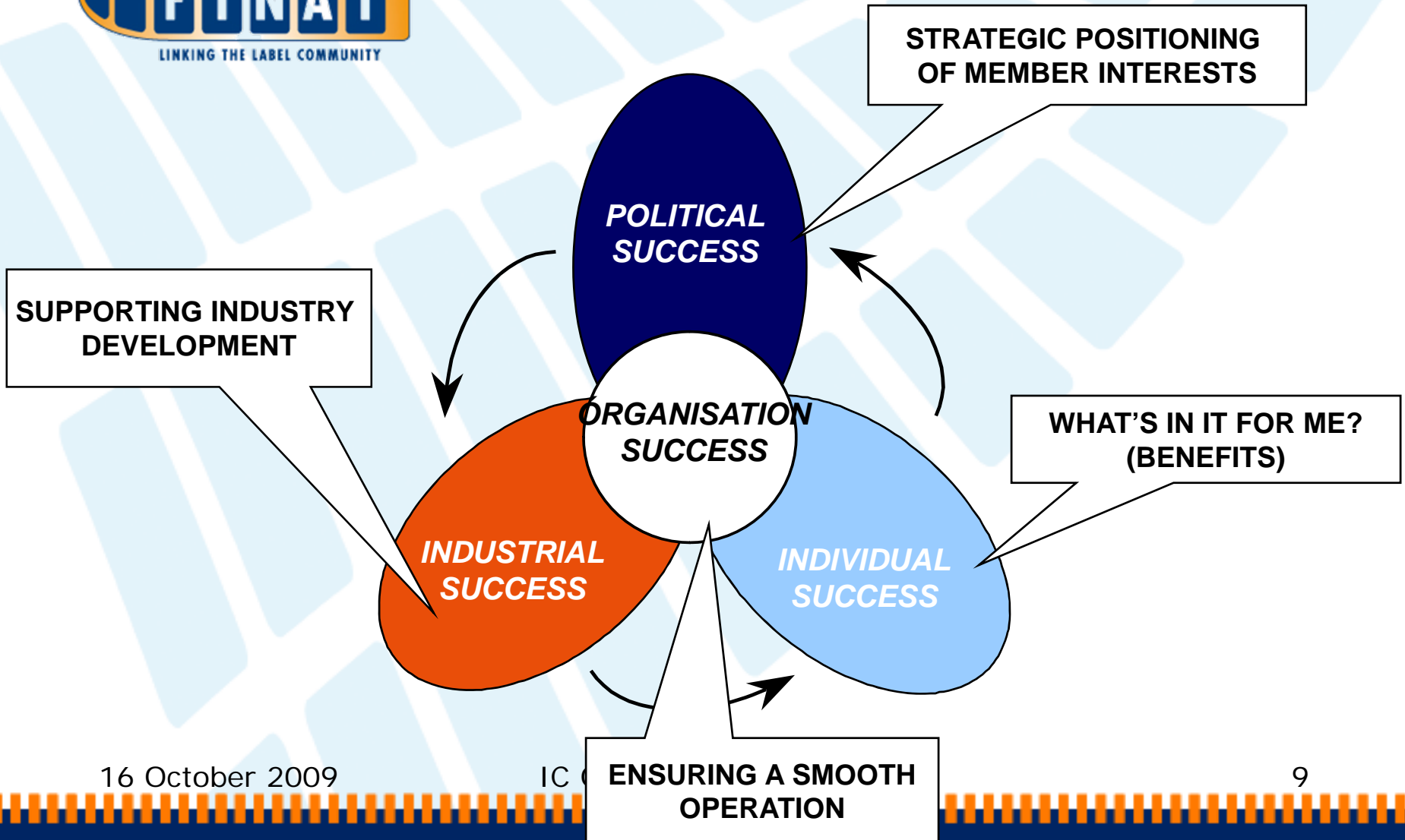
- LATMA *Australia*
Label and Tag Manufacturers Association of Australia
- ABIEA *Brazil*
Associação de Brinquedo Adesivo e Label Manufacturers
- DLA *Denmark*
Danish Label Association
- UNFEA *France*
Union Française de Fabricants d'Étiquettes Adhésives
- VsKÉ *Germany*
Verband der Hersteller selbstklebender Etiketten und Schriftschablonen e.V.
- LMAI *India*
Label Manufacturers Association of India
- PRIPAC *Iran*
Print Research, National R&D Association for Printing and Packaging Industry
- GIPEA *Italy*
Gruppo Industrie Produttori Etichette Adesive
- JFLP *Japan*
Japanese Federation of Label Printing Industry
- SALMA *New Zealand*
Self Adhesive Label Manufacturers Association of New Zealand
- PIFSA *South Africa*
Printing Industry Federation of South Africa
- ANFEC *Spain*
Asociación Nacional de Fabricantes de Etiquetas en Cartón
- GFF *Sweden*
Guldskrifts Gruppernas Förening
- ESD *Turkey*
Turkish Label Association
- BPIF Labels *United Kingdom*
British Printing Industries Federation - Labels
- BSRLA *United Kingdom*
British Retailers Label Association
- TLMi *USA*
Tag and Label Manufacturers Institute, Inc.

FINAT membership

- 0 members -
- 1-10 members -
- 11-25 members -
- 26 and more members -



Propelling the success of associations



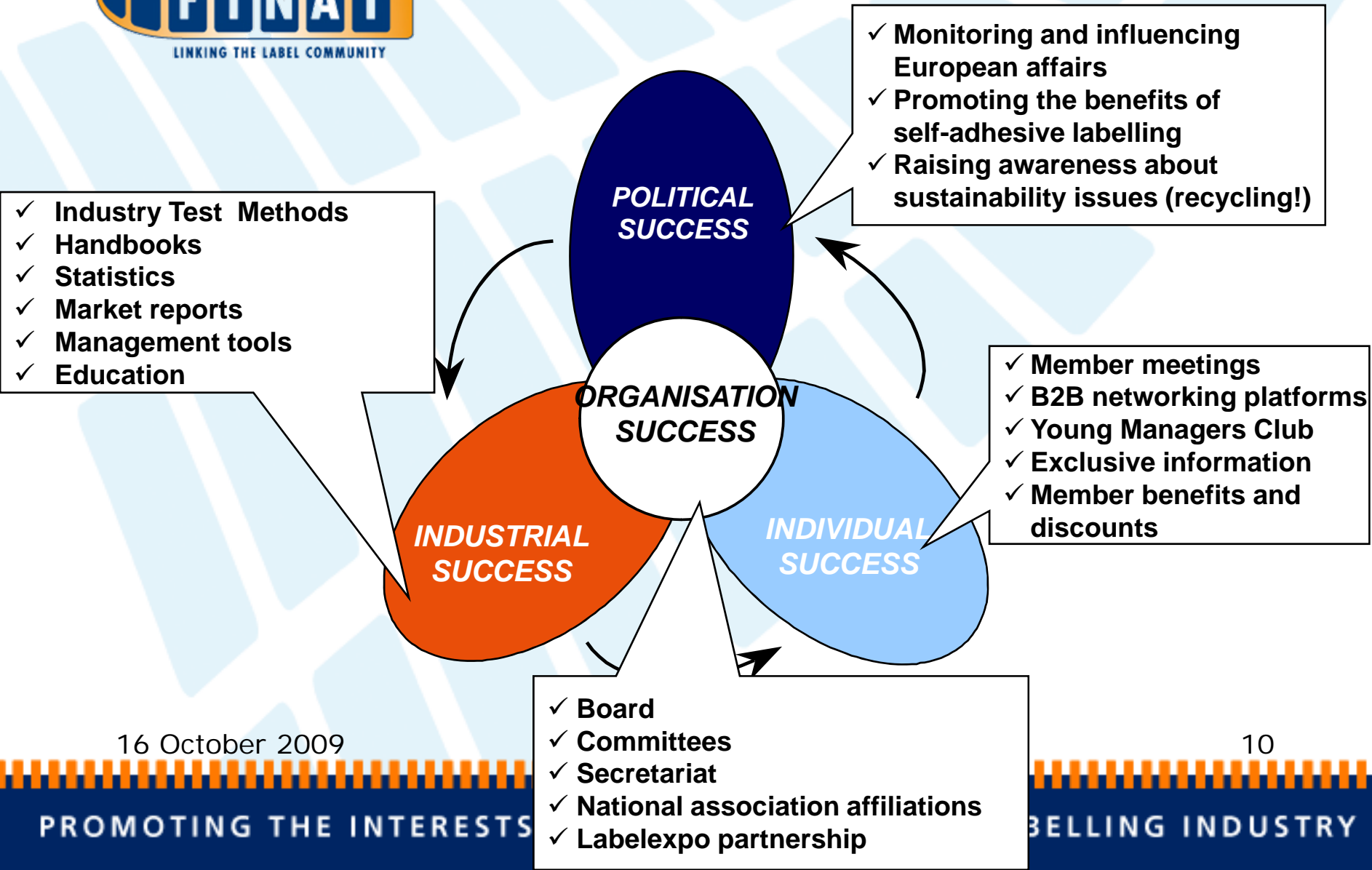
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Critical factors of success for FINAT

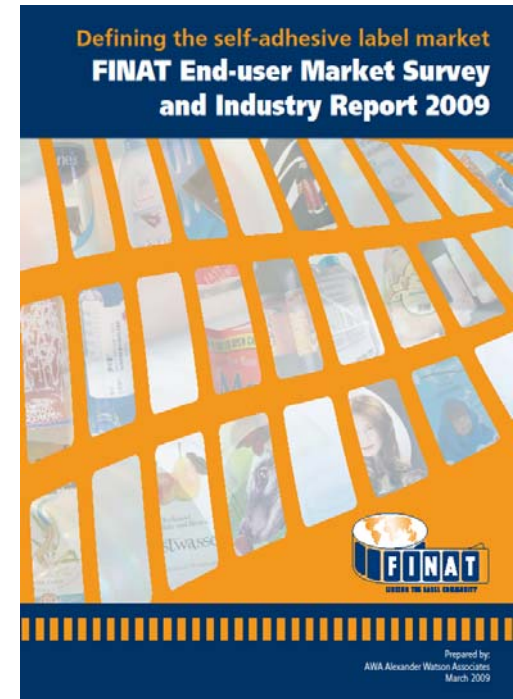
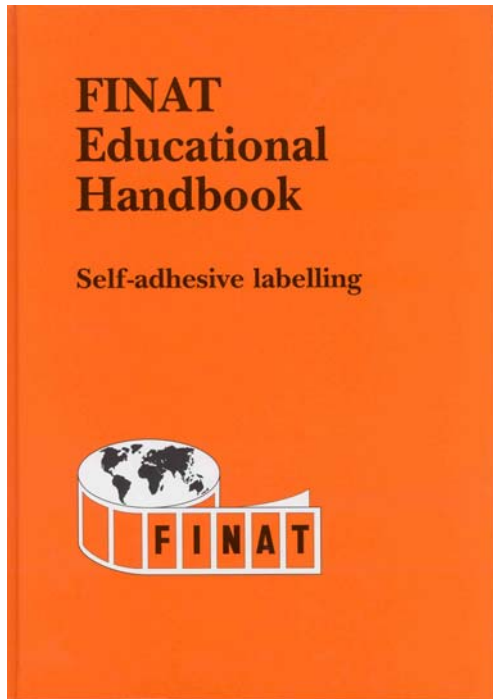


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Educational materials available from FINAT



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Educational materials available from FINAT

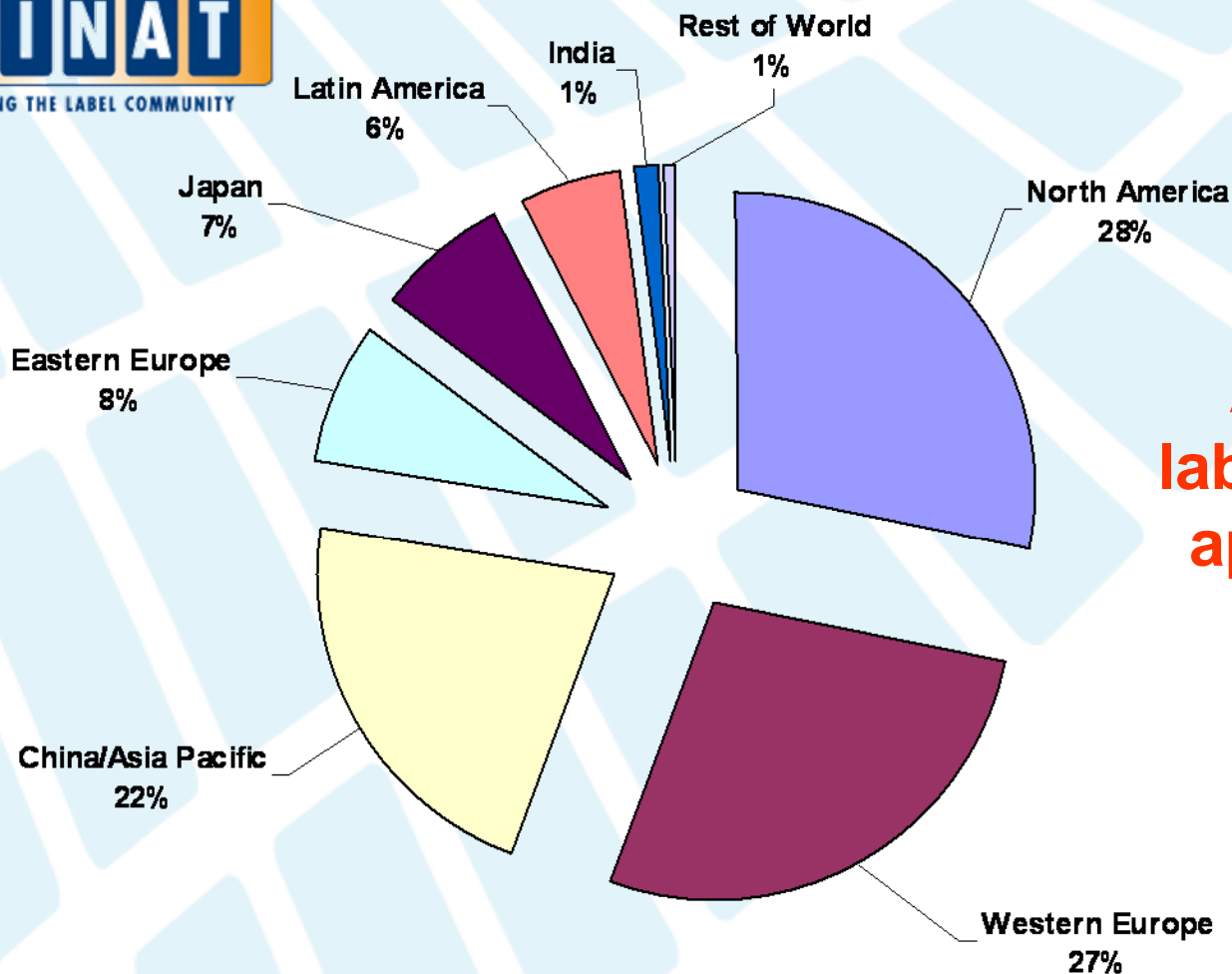


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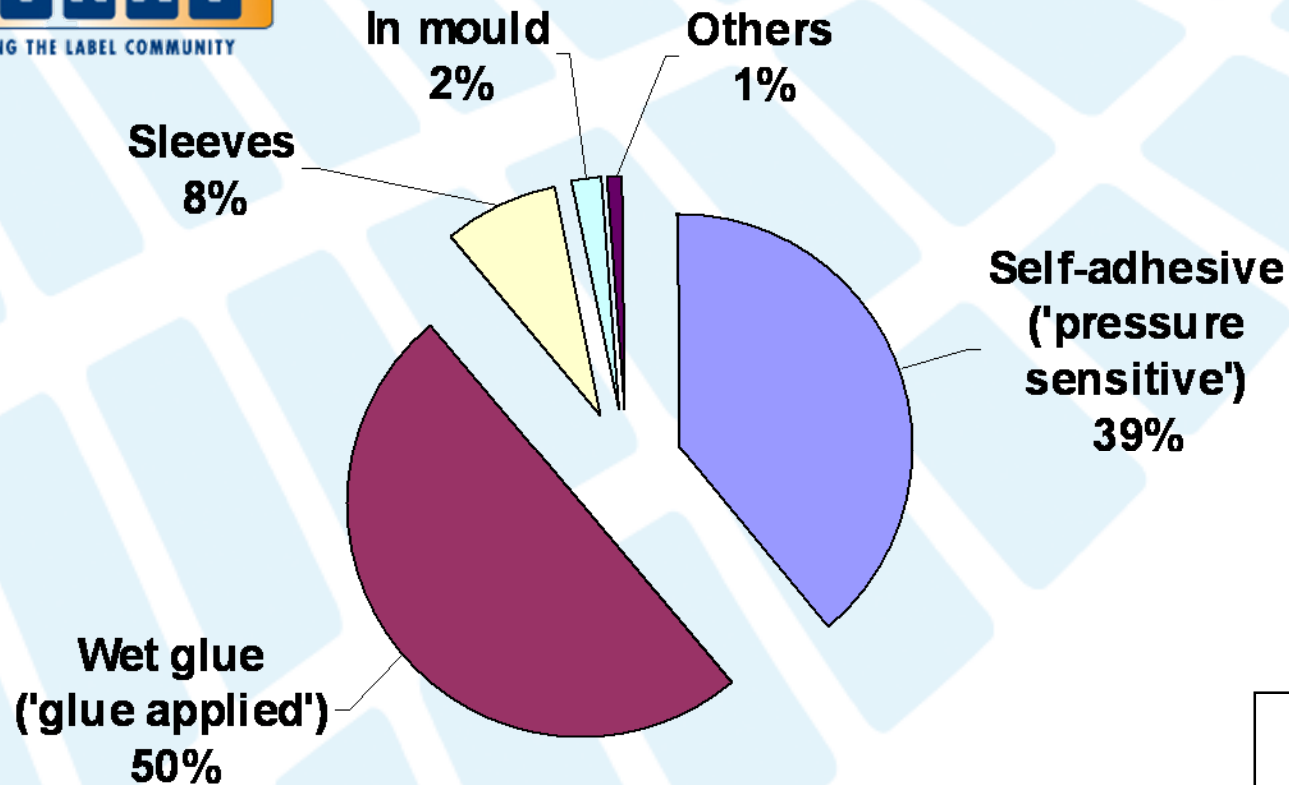
Breakdown global label market ALL LABELS



**All kinds of
labels in 2007
approaching
36 bln. m2**

Source:
Labels & Labeling

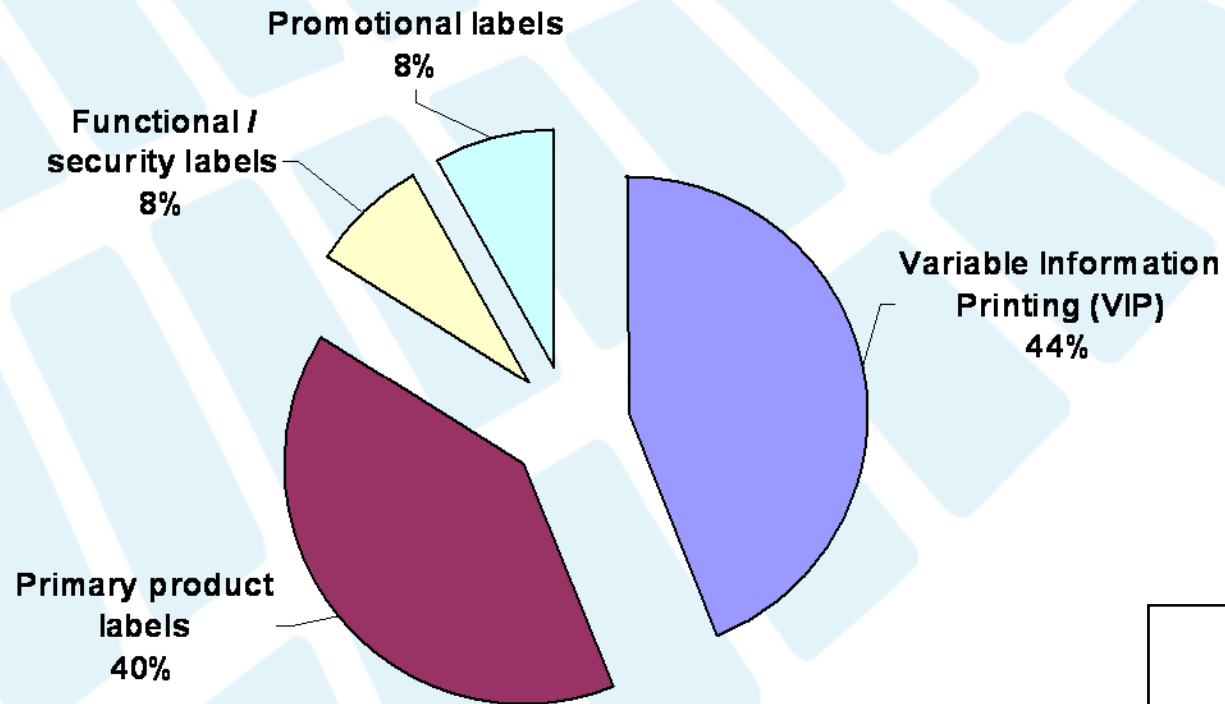
World market shares by labelling technology, 2007



Source:
AWA Alexander
Watson Associates

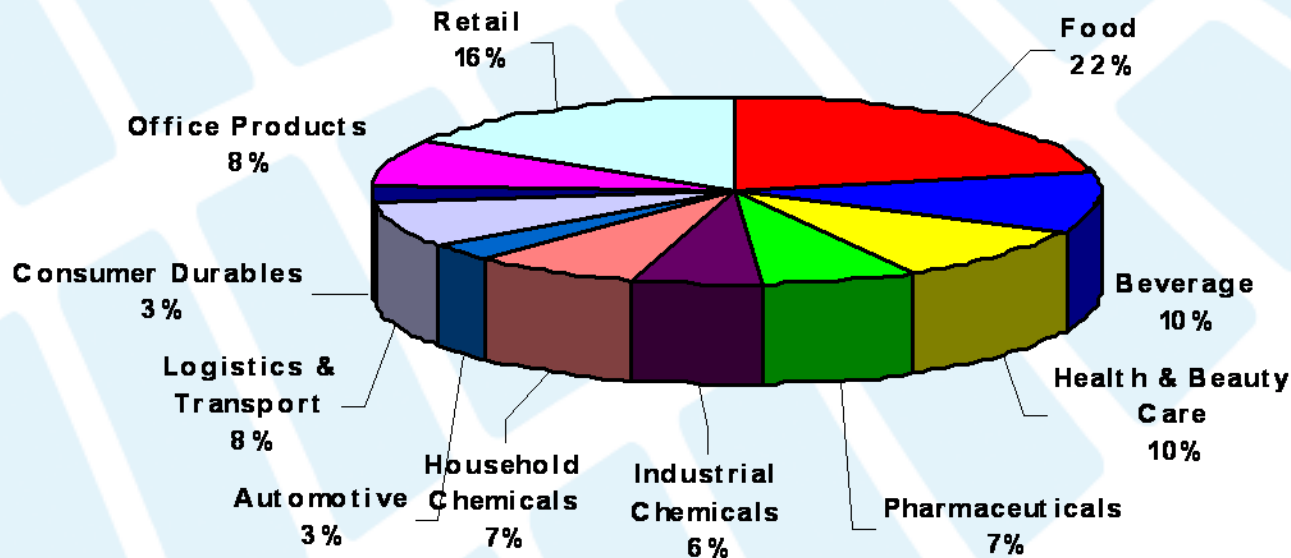


Breakdown self-adhesive labelling markets Europe, by application



Source:
AWA Alexander
Watson Associates
/ FINAT, 2009

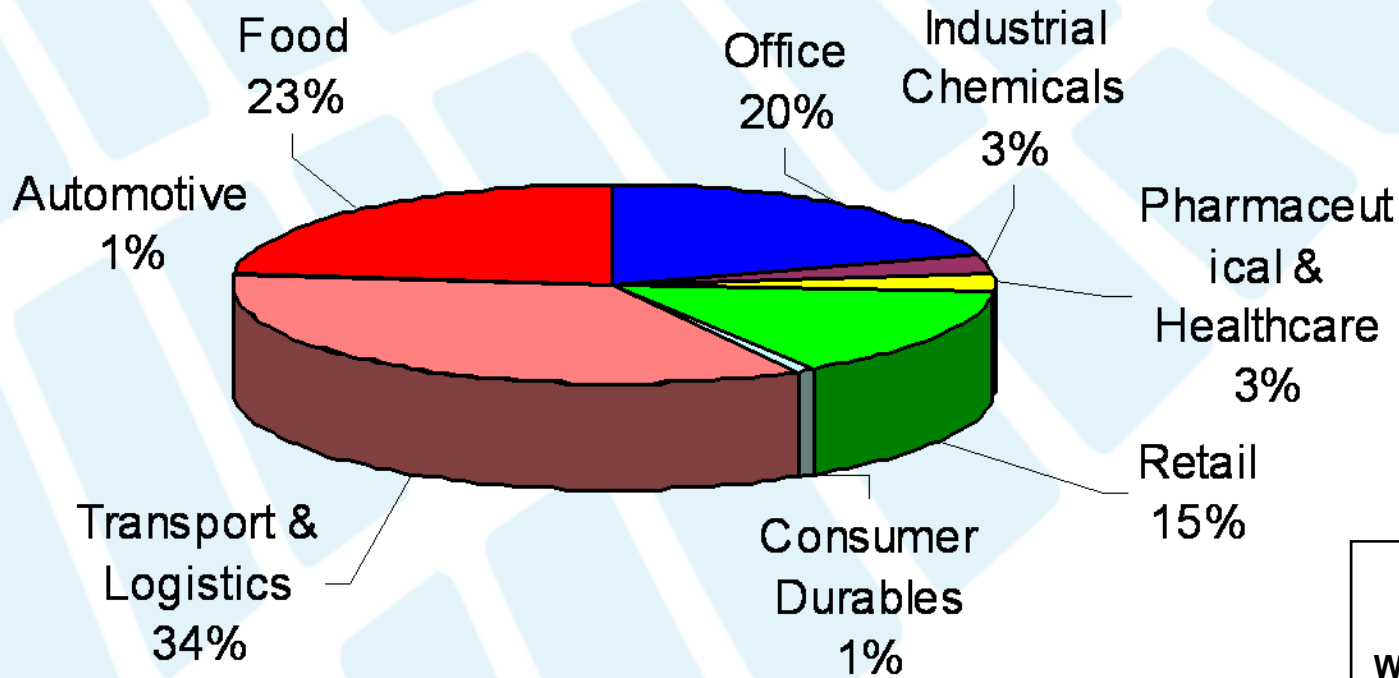
Breakdown self-adhesive label market Europe, by market segment



Source:
AWA Alexander
Watson Associates
& FINAT, 2009



Breakdown VIP label market Europe, by market segment

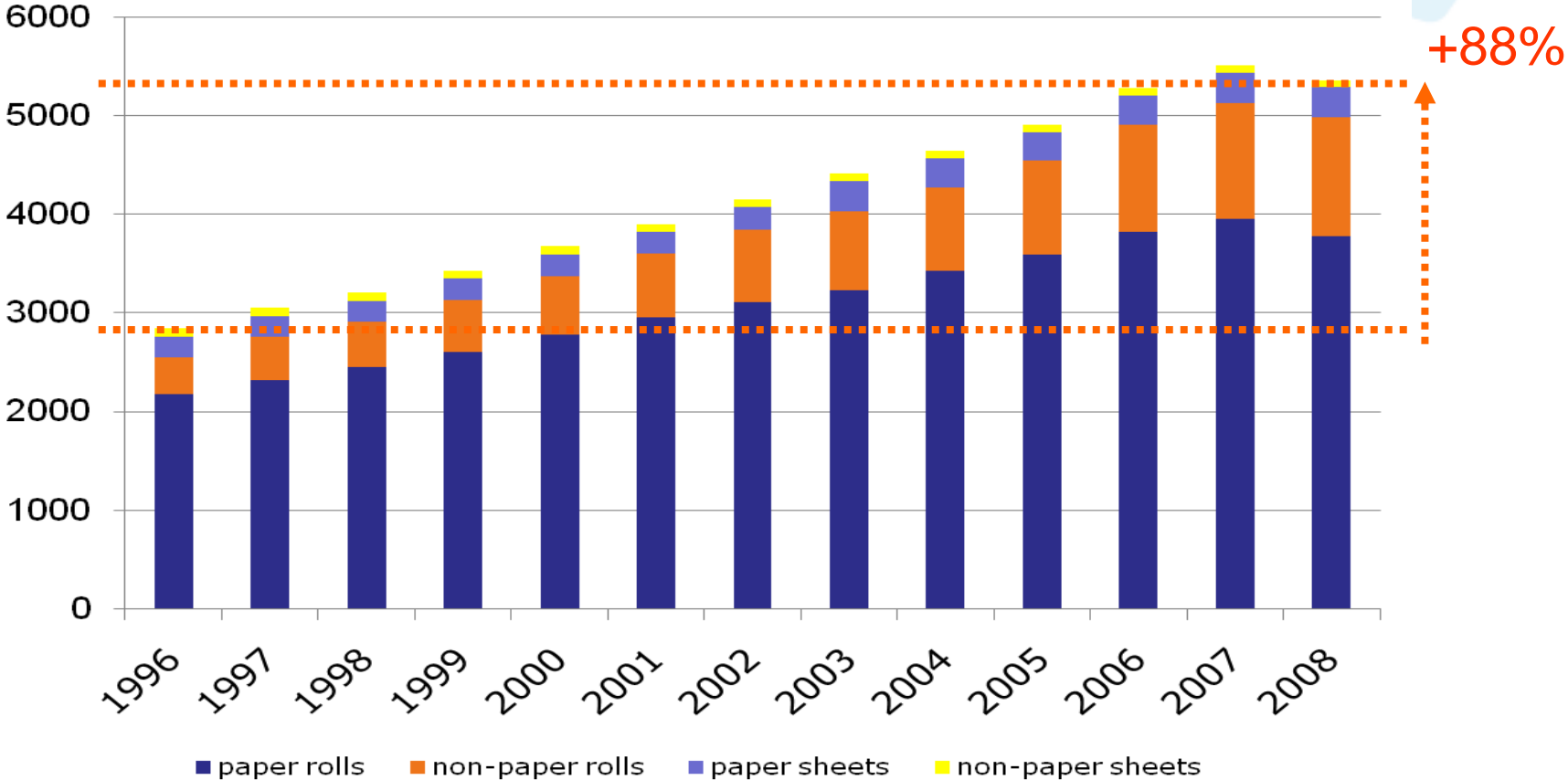


Source:
AWA Alexander
Watson Associates
& FINAT, 2009



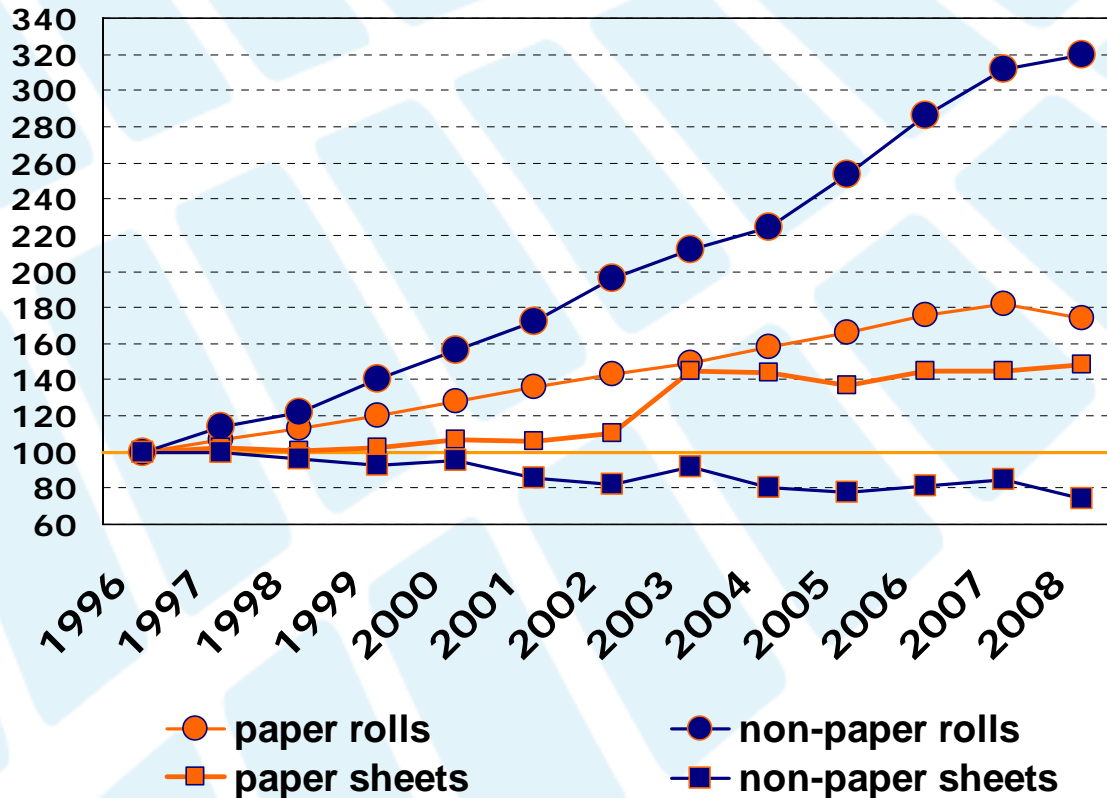
Labelstock Demand Europe, 1996 – 2008

Total consumption 2008 5.35 bln m2



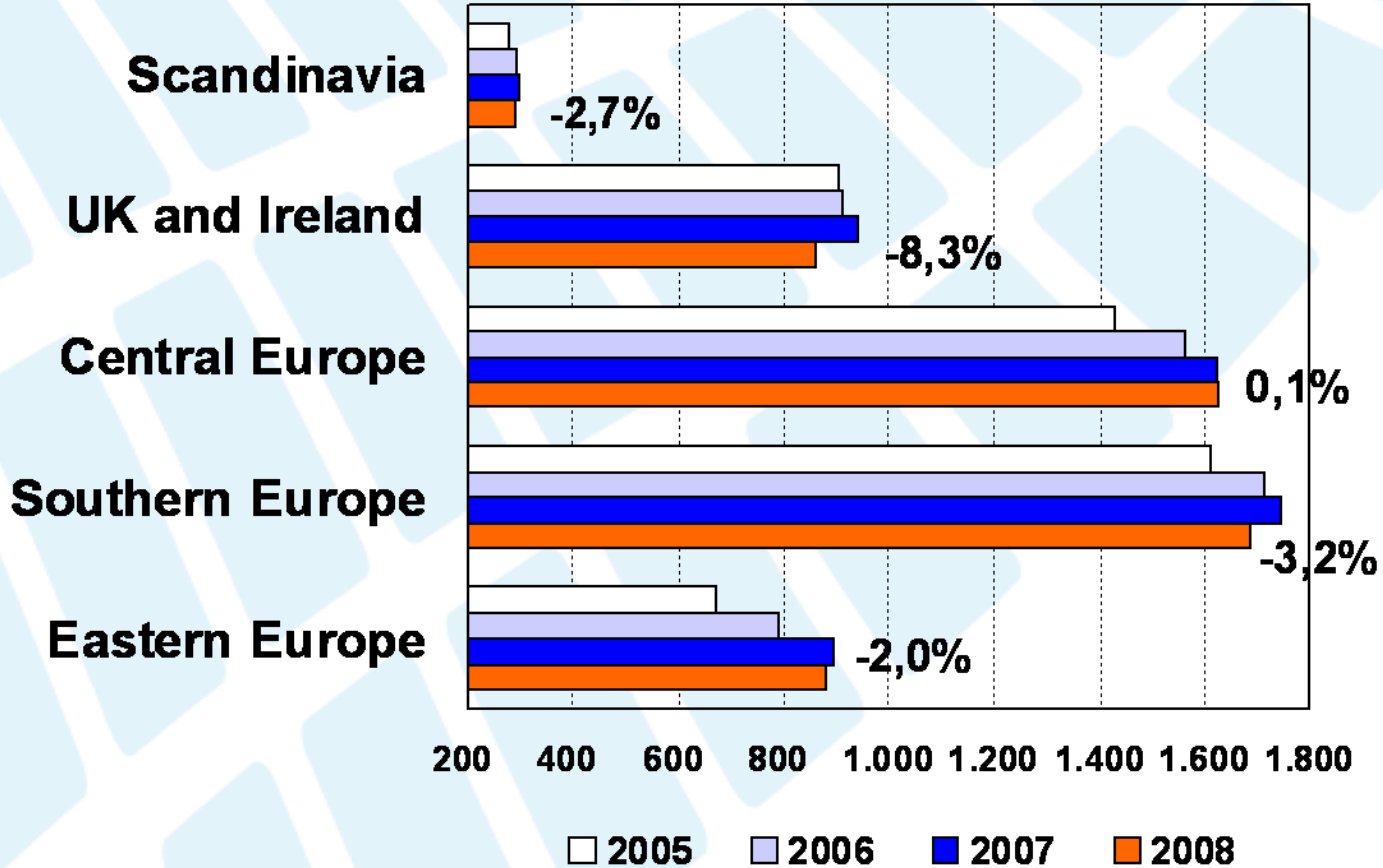


Relative growth

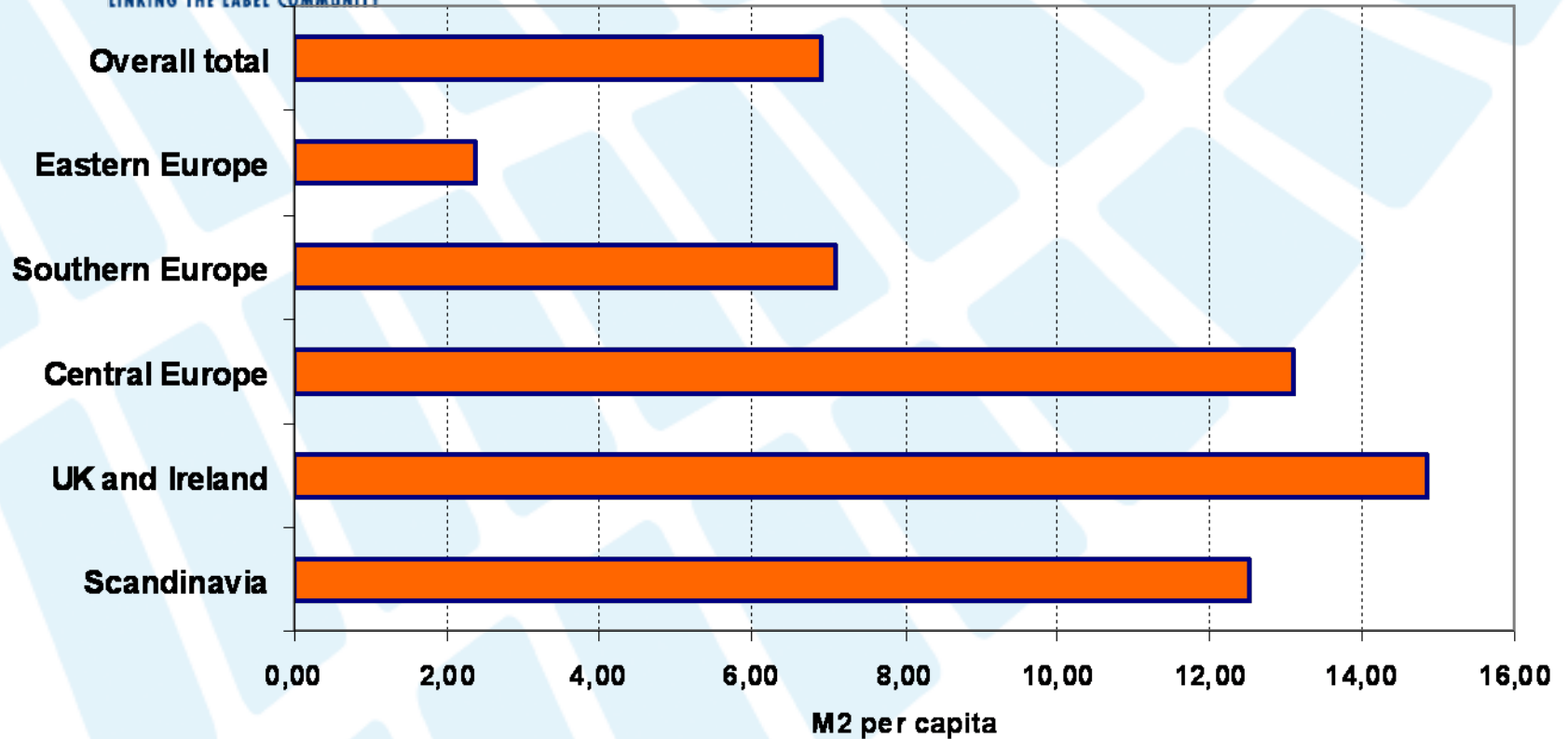




Sales by Region 2008



Self-adhesive labelstock consumption per capita



Source:
FINAT
2008

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Concluding remarks

- On-going globalisation of markets
 - Demand
 - Supply
 - Need for global label partnerships
- Growing awareness of CSR
 - Sustainability requirements
- Required globalisation of standards
 - Materials
 - Operating skills
 - Management skills
 - Best practices
- FINAT to provide the platform for global interaction
 - B2B networking
 - Young Managers Club
 - Education
 - Test Methods



Thank you for your attention!

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