

Market Study: Labels



Europe Report (2nd edition)

This brochure provides further information on the study “Labels - Europe (2nd edition)”

The Market Study in Brief

Are mini shampoo bottles or stickers on bananas redundant? The EU Commission wants to ban “unnecessary packaging” with a new regulation. This would also affect label manufacturers. Other EU regulations, however, are increasing the demand for labels, for example, because the nutritional value of food, the energy consumption of electrical appliances, or the hazardousness of chemicals must be indicated. Ceresana has analyzed the market for labels in 21 countries: Consumption of paper and plastic labels is expected to increase by an CAGR of 1.5% until 2032.

Biobased labels for biobased packaging

The total area of small labels and stickers adds up to millions of square meters. As environmentally friendly packaging is increasingly in demand, labels made from biodegradable or recyclable materials, such as labels made from bioplastics, can score particularly well in conjunction with biobased adhesives. Currently, the most dynamic development occurs in the “cosmetics and pharmaceuticals” sector, which consumes more and more plastic labels.

Labels are becoming smart and talkative

QR codes, RFID tags and near field communication (NFC labels): Labels are increasingly becoming as “smart” as digitalization and the Internet of Things demand. Smart labels can communicate with smartphones or other devices: Labels report the expiration products or other important information about the contents of the packaging; they make supply chains transparent and ensure anti-counterfeiting and traceability. However, the biggest growth occurs in in-mold labels (IML). Label and packaging can also be recycled well because they are made of the same plastic,

usually PP or HDPE. Ceresana expects demand for in-mold labels to grow by 2.4% per year.

The current Ceresana market study:

Chapter 1 presents label consumption in square meters and revenues (in EUR and USD) for the whole of Europe. Market forecasts are made up to the year 2032. The data on label consumption is broken down by materials (paper; polyethylene, polypropylene, PVC, PET and other plastics), by areas of application and by different label types.

Chapter 2 examines the respective total revenues and consumption of the various label types for 21 European countries, differentiated in each case for paper and plastic labels.

These **application areas** are considered: Lemonades, Water, Fruit juices, Other non-alcoholic beverages, Beer, Wine & Spirits, Food, Cosmetics & Pharma, and Others.

The “**Food**” application area is additionally broken down into the following sub-categories (separately for paper labels and plastic labels): Spreads, Baked goods, Ready-made meals, Meat & Fish, Breakfast cereals, Chilled & frozen food, Canned food, Dairy products, Fruit & Vegetables, Sauces & Condiments, Confectionery, Dry food, and Other food.

With regard to **label types**, the following categories are distinguished separately for paper and plastic labels: Self-adhesive labels, Glued labels, Shrink labels, In-Mold labels, and Other labels.

Chapter 3 provides 68 profiles of the most important producers, such as Ahlstrom, Amcor, CCL, Dow, Essentra, Fuji Seal, Huhtamaki, Mondi, Westrock, and Zebra Technologies.

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2.4.1 Demand and Revenues - Total

In Czechia, approximately X million m² of labels were consumed in 2022. We expect demand to increase by X% p.a. to approx. XXX million m² by 2032.

Revenues generated with labels reached a volume of EUR X million in 2022. We forecast an average increase of X% per year in this respect up to 2032.

Revenues	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Million USD	X	X	X	X	X	X	X	X	X	X % p.a.
Million EUR	X	X	X	X	X	X	X	X	X	X % p.a.

Table1: Revenues in Czechia from 2020 to 2032 in million USD and million EUR

2.4.2 Demand Split by Application Area

2.4.2.1 Total

in million m ²	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Lemonades	X	X	X	X	X	X	X	X	X	X % p.a.
Water	X	X	X	X	X	X	X	X	X	X % p.a.
Fruit Juices	X	X	X	X	X	X	X	X	X	X % p.a.
Other Non-Alcoholic Beverages	X	X	X	X	X	X	X	X	X	X % p.a.
Beer	X	X	X	X	X	X	X	X	X	X % p.a.
Wine & Spirits	X	X	X	X	X	X	X	X	X	X % p.a.
Food	X	X	X	X	X	X	X	X	X	X % p.a.
Cosmetics & Pharma	X	X	X	X	X	X	X	X	X	X % p.a.
Other Applications	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand for labels in Czechia from 2020 to 2032 – split by application

in million m ²	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Spreads	X	X	X	X	X	X	X	X	X	X % p.a.
Baked Goods	X	X	X	X	X	X	X	X	X	X % p.a.
Ready-Made Meals	X	X	X	X	X	X	X	X	X	X % p.a.
Meat & Fish	X	X	X	X	X	X	X	X	X	X % p.a.
Breakfast Cereals	X	X	X	X	X	X	X	X	X	X % p.a.
Chilled & Frozen Food	X	X	X	X	X	X	X	X	X	X % p.a.
Canned Food	X	X	X	X	X	X	X	X	X	X % p.a.
Dairy Products	X	X	X	X	X	X	X	X	X	X % p.a.
Fruit & Vegetables	X	X	X	X	X	X	X	X	X	X % p.a.
Sauces & Condiments	X	X	X	X	X	X	X	X	X	X % p.a.
Confectionery	X	X	X	X	X	X	X	X	X	X % p.a.
Dry Food	X	X	X	X	X	X	X	X	X	X % p.a.
Other	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand for labels in the application area "food" in Czechia from 2020 to 2032 – split by sub-category

2.4.2.2 Paper

in million m ²	2020	2021	2022	2023	2024	2025p	2026p	2027p	2032p	2022-2032
Lemonades	X	X	X	X	X	X	X	X	X	X % p.a.
Water	X	X	X	X	X	X	X	X	X	X % p.a.
Fruit Juices	X	X	X	X	X	X	X	X	X	X % p.a.
Other Non-Alcoholic Beverages	X	X	X	X	X	X	X	X	X	X % p.a.
Beer	X	X	X	X	X	X	X	X	X	X % p.a.
Wine & Spirits	X	X	X	X	X	X	X	X	X	X % p.a.
Food	X	X	X	X	X	X	X	X	X	X % p.a.
Cosmetics & Pharma	X	X	X	X	X	X	X	X	X	X % p.a.
Other Applications	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand for labels made of paper in Czechia from 2020 to 2032 – split by application

Market Study “Labels - Europe (2nd edition)”

21 Countries, 68 Producers, 420 Pages, 24 Graphs, 279 Tables, 07/2023

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(For each country: revenues, demand split by application (separately for paper and plastic), demand split by type of label, and demand split by type of plastic)

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- 2.19 The Netherlands
- 2.20 Turkey
- 2.21 United Kingdom
- 2.22 Other Europe

in million m ²	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Spreads	X	X	X	X	X	X	X	X	X	X % p.a.
Baked Goods	X	X	X	X	X	X	X	X	X	X % p.a.
Ready-Made Meals	X	X	X	X	X	X	X	X	X	X % p.a.
Meat & Fish	X	X	X	X	X	X	X	X	X	X % p.a.
Breakfast Cereals	X	X	X	X	X	X	X	X	X	X % p.a.
Chilled & Frozen Food	X	X	X	X	X	X	X	X	X	X % p.a.
Canned Food	X	X	X	X	X	X	X	X	X	X % p.a.
Dairy Products	X	X	X	X	X	X	X	X	X	X % p.a.
Fruit & Vegetables	X	X	X	X	X	X	X	X	X	X % p.a.
Sauces & Condiments	X	X	X	X	X	X	X	X	X	X % p.a.
Confectionery	X	X	X	X	X	X	X	X	X	X % p.a.
Dry Food	X	X	X	X	X	X	X	X	X	X % p.a.
Other	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand for labels made of plastics in the application area “food” in Czechia from 2020 to 2032 – split by sub-category

2.4.3 Demand Split by Type of Label

in million m ²	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Self-Adhesive Labels	X	X	X	X	X	X	X	X	X	X % p.a.
Glued Labels	X	X	X	X	X	X	X	X	X	X % p.a.
Shrink Labels	X	X	X	X	X	X	X	X	X	X % p.a.
In-Mould Labels	X	X	X	X	X	X	X	X	X	X % p.a.
Other Labels	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand for labels in Czechia from 2020 to 2032 – split by type of label

in million m ²	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Spreads	X	X	X	X	X	X	X	X	X	X % p.a.
Baked Goods	X	X	X	X	X	X	X	X	X	X % p.a.
Ready-Made Meals	X	X	X	X	X	X	X	X	X	X % p.a.
Meat & Fish	X	X	X	X	X	X	X	X	X	X % p.a.
Breakfast Cereals	X	X	X	X	X	X	X	X	X	X % p.a.
Chilled & Frozen Food	X	X	X	X	X	X	X	X	X	X % p.a.
Canned Food	X	X	X	X	X	X	X	X	X	X % p.a.
Dairy Products	X	X	X	X	X	X	X	X	X	X % p.a.
Fruit & Vegetables	X	X	X	X	X	X	X	X	X	X % p.a.
Sauces & Condiments	X	X	X	X	X	X	X	X	X	X % p.a.
Confectionery	X	X	X	X	X	X	X	X	X	X % p.a.
Dry Food	X	X	X	X	X	X	X	X	X	X % p.a.
Other	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand for labels made of paper in the application area “food” in Czechia from 2020 to 2032 – split by sub-category

2.4.2.3 Plastics

in million m ²	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Lemonades	X	X	X	X	X	X	X	X	X	X % p.a.
Water	X	X	X	X	X	X	X	X	X	X % p.a.
Fruit Juices	X	X	X	X	X	X	X	X	X	X % p.a.
Other Non-Alcoholic Beverages	X	X	X	X	X	X	X	X	X	X % p.a.
Beer	X	X	X	X	X	X	X	X	X	X % p.a.
Wine & Spirits	X	X	X	X	X	X	X	X	X	X % p.a.
Food	X	X	X	X	X	X	X	X	X	X % p.a.
Cosmetics & Pharma	X	X	X	X	X	X	X	X	X	X % p.a.
Other Applications	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand for labels made of plastics in Czechia from 2020 to 2032 – split by application

in million m ²	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
Self-Adhesive Labels	X	X	X	X	X	X	X	X	X	X % p.a.
Glued Labels	X	X	X	X	X	X	X	X	X	X % p.a.
Shrink Labels	X	X	X	X	X	X	X	X	X	X % p.a.
In-Mould Labels	X	X	X	X	X	X	X	X	X	X % p.a.
Other Labels	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand for labels made of plastics in Czechia from 2020 to 2032 – split by type of label

2.4.4 Demand Split by Type of Plastic

in million m ²	2020	2021	2022	2023p	2024p	2025p	2026p	2027p	2032p	2022-2032
PE	X	X	X	X	X	X	X	X	X	X % p.a.
PP	X	X	X	X	X	X	X	X	X	X % p.a.
PVC	X	X	X	X	X	X	X	X	X	X % p.a.
PET	X	X	X	X	X	X	X	X	X	X % p.a.
Other	X	X	X	X	X	X	X	X	X	X % p.a.
Total	X	X	X	X	X	X	X	X	X	X % p.a.

Table: Demand for labels made of plastics in Czechia von 2020 bis 2032 – split by type of plastic

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3 Company Profiles*

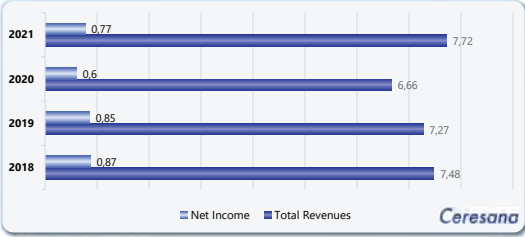
- Austria (4 Producers)
- Belgium (2)
- Czechia (1)
- Finland (3)
- France (3)
- Germany (19)
- Hungary (1)
- Italy (7)
- Luxembourg (2)
- Poland (2)
- Russia (1)
- Slovenia (1)
- Spain (3)
- Sweden (2)
- Switzerland (2)
- The Netherlands (4)
- Turkey (2)
- Ukraine (1)
- United Kingdom (8)

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Financial Key Data (in billion EUR)



Year	Net Income	Total Revenues
2021	0,77	7,72
2020	0,6	6,66
2019	0,85	7,27
2018	0,87	7,48

*Financial Key Data from Mondi Group

General Information about the Company

Divisions, Product Range

The product portfolio includes:

- Flexible packaging, bags and pouches
- Release liners
- Functional films
- Corrugated solutions
- Industrial bags
- Barrier coatings
- Specialty kraft paper
- Sack kraft paper
- Containerboard
- Office and professional printing papers

Production Sites

The company operates approximately 100 production sites located across 30 countries in Europe, North and South America, Africa, and Asia. The European manufacturing sites are located in Germany, Russia, Hungary, Spain, Poland, Czechia, Ukraine, Austria, Turkey, Sweden, Italy, The Netherlands, France, Belgium, Finland, Serbia, Slovakia, and Bulgaria.

Profile Summary

Mondi plc was founded in 1967 by Mondi South Africa and is based in Weybridge, Surrey, United Kingdom. Mondi engages in packaging and paper operations.

In 2021, the company employed about 26,822 people. The same year, Mondi held total assets amounting to EUR 9.26 billion.

Divided by product field, 36% of sales in 2021 were generated with flexible packaging, 32% with corrugated packaging, 21% with uncoated fine paper, and 11% with engineering materials.

Divided by geographic region, 37% of the 2021 net sales were generated in Western Europe, 26% in Emerging Europe, 9% in Russia, 9% in Africa, 10% in North America, and 7% in Asia and Australia.

The company is listed on the London Stock Exchange.

In 2022, Mondi completed the merger of Mondi Tire Kutsan and Mondi Olmuksan in Turkey.

The company is certified according to ISO 9001 and ISO 14001. Additionally, some production plants are ISO 45001 and ISO 50001 certified.

Specific Information about Labels

Mondi produces the following label types:

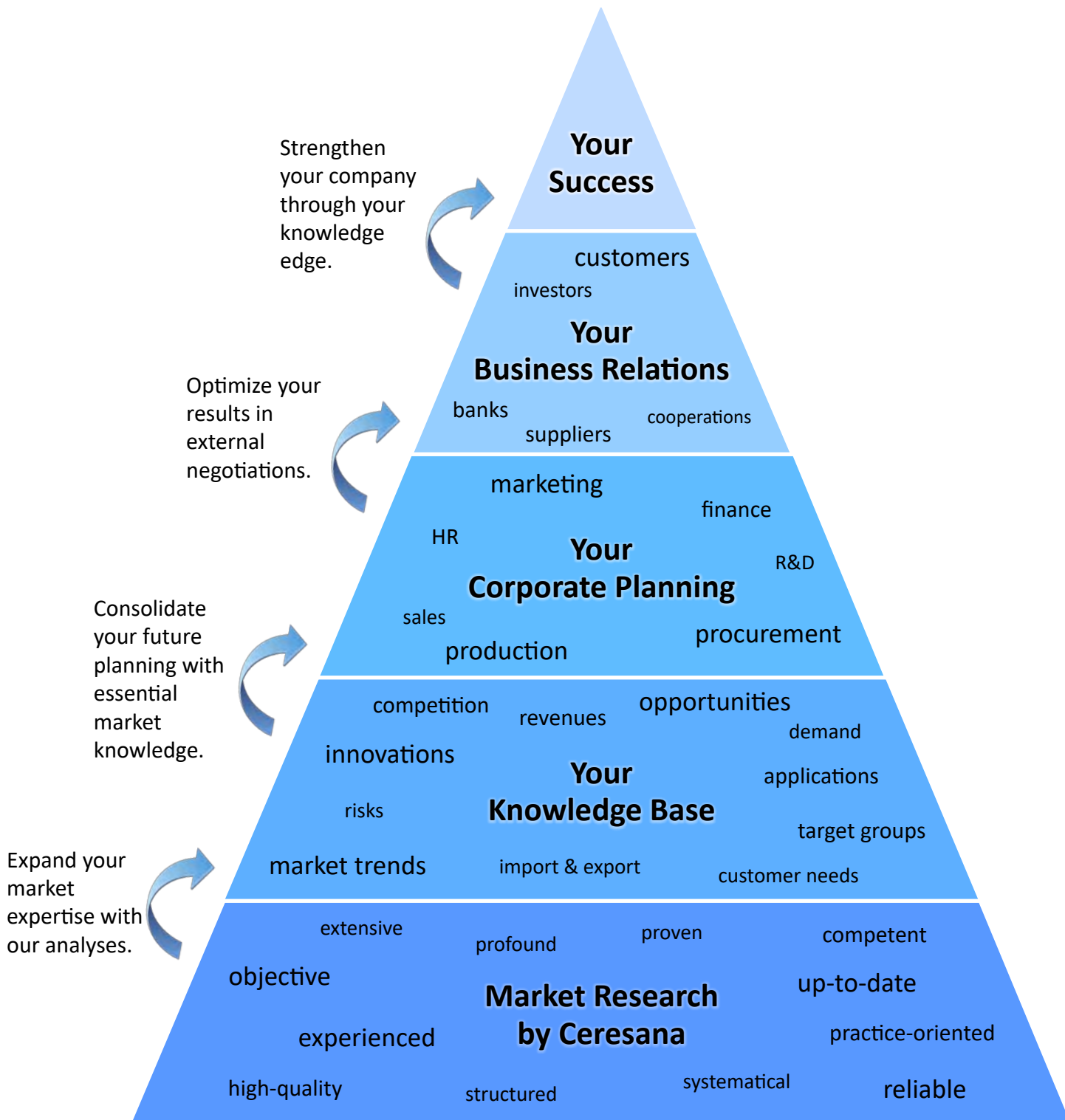
- Standard label film: available with different features and particularly suitable for wet room applications and plastic containers such as shampoo bottles, detergent bottles, cups, fabric softener, soap packaging, and deodorant
- Label liners: paper-based and film-based release liner, CCK paper, PCK paper, glassine SCK, and PET and BOPP liners for a wide range of label applications such as food, beverages, personal and household care, cosmetics, retails, tracking, logistics, and pharma industry

*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

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As one of the world's leading institutes for market research, we have been specializing in the areas of mobility, chemicals, plastics, packaging, industrial goods, and bio-economy for the past 20 years.

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8. Find out which global and regional developments influence supply and demand.

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- Executive boards, finance, business development, strategic planning, market research, marketing, sales, distribution, R&D, and procurement



**Thank you
for your trust!**



If you have any questions, please do not hesitate to contact us.



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