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Editor's Note

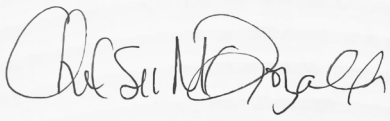
Welcome to this special edition of Labels & Labeling, where we dive into the market data and evolving trends shaping the future of the global label and packaging industry.

This edition explores each region individually, analyzing the unique trends, opportunities and challenges all converters and suppliers face. However, if you zoom out and look at the markets as a whole, you'll see that they're not so different after all. You undoubtedly will notice several common themes across these pages: the rise of sustainability as a global priority, a technological transformation led by digitization and automation, increasing demand for short-run labels and packaging, and regulations that could change how the industry operates.

As readers of Labels & Labeling already know, the label and package printing sector is proven to be resilient in the face of economic headwinds and adaptable to new market demands. As we navigate these global trends, one thing is clear: the label and packaging industry is at the forefront of some of the most exciting developments in manufacturing. Globally, the industry's ability to adapt to shifting consumer buying patterns and regulatory landscape, the adoption of cutting-edge technology, and the sustainability focus have – and will continue to – define this industry's success.

Zooming back in on the individual needs and demands of diverse markets is why Labelexpo Global Series continues to be an invaluable resource for the industry. It's why we are proud to publish this special edition of Labels & Labeling in conjunction with our sister company, Labelexpo Global Series. With this special edition, as with all Labelexpo events, we invite you to learn about the innovations that continue to drive global growth.

Whether you are a converter, supplier, brand owner, or label and packaging designer, we encourage you to explore this special section to gain insights from industry leaders and get inspired with information you can bring back to your local businesses.



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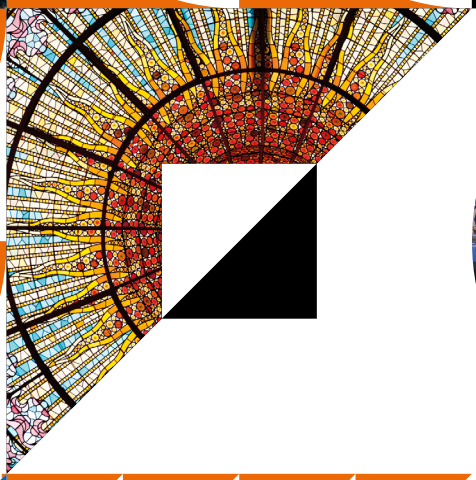





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Europe: Sustaining uncertain recovery

Persistent economic and political uncertainties weigh on the industry despite healthy labelstock growth through 2024. Andy Thomas-Emans reports

On the surface, 2024 looks to have been a good year for overall European label market growth.

In the first half of 2024, labelstock demand showed a healthy 26 percent year-on-year increase compared to the same period in 2023. The trend continued through Q3 2024, albeit at a markedly slower pace of just under 7 percent, bringing cumulative growth of 19.5 percent compared to 2023.

The cause of this growth is not a turbo-charged European economy. It is because European converters have used the stocks built up in 2022 in response to the 'perfect storm' of post-Covid dislocation, supply chain disruption, Finnish paper strikes and the advent of war in Ukraine.

> **"The cause of this growth is not a turbo-charged European economy. It is because European converters have used the stocks built up"**

With warehouses full of unused labelstock, demand for new materials in 2023 plummeted by a staggering 25.8 percent to levels not seen since Finat first started collecting figures in 2013. This represented over 2 billion sqm (6 billion sqft) of lost label production.

This situation was made worse by rising interest rates and high inflation, which impacted consumer confidence, meaning it took longer than expected for labelstock to make its way through the system. So, the 2024 label industry growth figures represent a return to 'business as usual' as converters finally used up their last buffer stocks.

European response

In reality, Europe continues to operate in a challenging economic environment marked by persistently high inflation, rising energy costs, slow economic growth and political uncertainty. These factors helped pull down label industry growth rates toward the second half of 2024. Of particular concern is the declining industrial output in Germany, traditionally the beating heart of the European economy.

European consumers have responded by cutting back on discretionary spending and prioritizing value for money. This has impacted label demand across a range of key end-use segments, from food and beverage to health and personal care and e-commerce, all of which experienced a slowdown through the latter part of 2024.

Finat's Q3 2024 Radar report shows how this has impacted the different label material categories.

In the PS segment, we see the continued growth of filmic roll labelstocks, now accounting for almost one-third of the overall pressure-sensitive market. This growth is driven by the increasing use of polypropylene rolls in high-quality product decoration films for sectors like health, beauty and food, as brands seek to differentiate themselves in a fiercely competitive market.

Particularly notable in the Radar survey is a 14.6 percent increase in the volume of wet glue labels used in Europe. This was mainly driven by the beer market, particularly in the premium and non-alcoholic categories.

Wraparound labels were hit by reduced consumer spending on bottled water and soft drinks, posting a modest 1.7 percent growth. Similarly, shrink sleeve volumes have been impacted by the decline in sales of single-serve beverages, particularly in the energy and soft drinks categories.

This gloomy FMCG outlook has been somewhat balanced by a more rapid recovery across some industrial segments. The Radar report shows significant growth in the volume of direct thermal labels shipped in 2024, particularly for applications requiring short-term variable data, such as online shopping logistics and inventory management. This reflects the broader shift towards e-commerce and process automation.

Likewise, in-mold label growth was bolstered by the more rapid recovery of the industrial chemicals sector compared to a slowdown in the IML food segment.

Regulatory uncertainty

A major source of uncertainty for the European label industry is the impact that regulatory pressures will have on brands and their packaging supply chains, particularly by the extension of the EU's Green Deal and revisions to Europe's Extended Producer Responsibility (EPR) schemes.

It is unclear what the impact will be on different label material categories.

For example, the move to mono materials could favor in-mold labels, while wet glue paper labels have a clear and direct sustainability message. At the same time, the PS and shrink sleeve industries are addressing their sustainability weaknesses in a burst of new technology development aimed at meeting the requirements of the EU's circular economy directive.

Meanwhile, the EU's Digital Product Passport (DPP) directive kick-started a new wave of investment in smart labeling technologies in 2024. Under DPP, every product will have a cloud-based 'Digital Twin' accessed either by QR code or RFID/NFC chip, so these capabilities are rapidly becoming central to European converters' future investment strategies.

The 2024 Finat European Label Forum demonstrated how these same Smart technologies feed into wider digitization and process automation initiatives, aiming to improve efficiency and transparency across supply chains.

While the European label industry faces significant headwinds — economic uncertainty, inflation, regulatory pressures, and the war in Ukraine — there are also major opportunities for growth and innovation.

Labelexpo Europe 2025 will have a special feature area dedicated to European packaging waste regulations. Scan the QR code to learn more about the event







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North America: Companies look to grow in tight labor market

With an unemployment rate of 4.1 percent, businesses are increasing automation and upping benefits. Selah Zighelboim reports

After a year dogged by high interest rates, the US closed out 2024 on a strong economic note. Inflation is under control at 2.4 percent, and the Federal Reserve has reduced interest rates to 4.5-4.75 percent.

According to Mordor Intelligence, the North American label market is valued at 9.8 billion USD in 2024, with a CAGR of 3.53 percent and is expected to grow to 11.68 billion USD in 2029.

"Every converter at this point in time, and every supplier as well, is looking at ways that they can put in place automation as a means of lessening the pressure from workplaces"

For much of 2024, high interest rates and an uncertain political environment caused by the presidential election made many labeling businesses reluctant or unable to invest in capital expenditures and hire new employees. At the same time, many press operators, particularly those skilled workers operating flexo presses, are aging out of the industry, and so converters held tight to the employees they did have. While there was an occasional bump in hiring, such as around Q2, hiring remained stagnant for much of the year.

With recent decreases in the interest rate, many companies are looking to grow in the last quarter of 2024. However, employers face challenges, according to Claudia St John of The Workforce Advisors during a recent TLMI webinar.

With a 4.1 percent unemployment rate in the US – what economists consider full employment – finding workers is difficult. Only about 7 million unemployed Americans are currently looking for work.

There are several ways companies have been addressing this issue.

One strategy has been through technological innovation, particularly increasing automation, adding AI and improving ease of use. Labelexpo Americas 2024 saw exhibitors showcasing technology leaning into this trend.

One example was a collaborative project by Martin Automatic, ETI Converting, Lemu Group and Lundberg Tech. The four companies partnered to show how their complementary technologies could boost productivity through an integrated production line they demonstrated across four booths and one walking aisle. This production line transformed raw materials into finished labels in a single pass in real time on its own. It was also a working job for Midwest-based Channeled Resources.

Another highlight was the 26in-wide FA-26 by Nilpeter, which made its US debut at Labelexpo. The FA-26 can ramp up to 820ft/min and adjust web tension and pressure automatically. It can also control registration automatically with a new color-based camera system.

'With our flexo technology, we can address many of our customers' challenges, especially with our increased focus on digitalization and automation in our machines,' says Martin Teilberg, Nilpeter's global marketing manager.

Other presses with automation features at Labelexpo Americas were Mark Andy's 26in-wide Performance Series S9 press; Bobst's Digital Master 340 hybrid press, which is capable of automatic quality inspection setup and has an upgraded automatic nozzle compensation system; HP Indigo's 6K press with its Intelligent Automation workflow; and Durst's Tau RSCi press, which has a new Hawk AI quality control system that reduces waste and improves print quality.

'Every converter at this point in time, and every supplier as well, is looking at ways that they can put in place automation as a means of lessening the pressure from workplaces, and whether that's through robotics or whether that's through a digital press or whether that's through certain automation of their customer service functions — maybe that's offshoring some of their customer service functions,' St John says. 'Businesses are looking at all different ways to ensure that they are addressing what they see as an impending concern.'

Artificial intelligence

AI is another technology that companies are increasingly implementing to address workforce challenges.

At Pack Expo in Chicago in November, Andy Lomasky, senior director of IT at PMMI, spoke about the potential of AI to increase productivity.

'We can use AI to train machinery and robots, and, of course, that increases efficiency,' Lomasky says. 'When you've got a robot that can work 24 hours a day, seven days a week and can think for itself when an anomaly arises, when something goes wrong on the line or when something changes, a parameter changes, there's just a tremendous amount of potential there to keep the lines running, keep the lines producing.'

In recent years, companies have adopted AI to automate quality control. AI is now also being used to schedule shifts, such as with Cerm's AI-powered Scheduling Optimizer, launched at Labelexpo Americas 2024.

Workplace culture

St John says she is seeing companies hiring from less conventional pools of employees they may not have previously considered, such as refugees, spouses of those serving in the military, rehabilitated ex-convicts or people with disabilities.

St John has also seen companies examining how they can increase benefits, including health insurance, retirement benefits and more flexible leave.

St John notes that employers can also provide some less traditional benefits, such as sabbaticals, pet insurance and four-day workweeks.

'Retention is the name of the game beyond hiring,' St John says.

Scan the QR code to read The Workplace Advisor's recent report on labor trends

Branding and design: Packaging trends that shaped 2024

As 2024 comes to a close, the labels and packaging industry is buzzing with exciting trends that are transforming the market, Akanksha Meena reports

Sustainability continues to take center stage, with brands eagerly embracing recyclable, compostable and bio-based materials to meet stricter regulations and growing consumer demand for eco-friendly products. At the same time, digital innovation is revolutionizing packaging – RFID tags, NFC chips and QR codes are making it easier than ever for consumers to access product details and sustainability practices.

Flexible packaging is also making waves as brands ditch heavy containers in favor of lighter, more sustainable packs. And let's not forget the power of tactile packaging – features such as foiling, embossing and unique textures create strong emotional connections with consumers, encouraging them to buy. These trends show how the packaging industry is evolving to be more sustainable, smarter and consumer friendly.

Sustainable packaging

Sustainability has evolved from a mere trend to a critical priority for brands, driven by increasingly stringent packaging regulations worldwide. As governments tighten policies around plastic waste, carbon emissions and packaging recyclability, brands must prioritize sustainable packaging to comply with these laws and meet consumer expectations for environmentally-responsible products.

Leading packaging and label material manufacturers have taken significant steps forward by launching new sustainable packaging materials that are recyclable, compostable or derived from bio-based content.

In addition to established brands making progress, emerging companies are also getting creative with their packaging. For instance, food, cosmetics and beverage startups opt for recyclable and biodegradable films and plastics, and packaging made from post-consumer waste to meet consumer demand and regulatory expectations.

The shift toward sustainable packaging is a reaction to external pressures and a growing understanding of its importance in building a more sustainable and profitable future for businesses. When a brand highlights its sustainable packaging directly on the packaging itself, it effectively captures the attention of today's eco-conscious consumers.



"Brands are increasingly opting for flexible packaging due to its lower carbon footprint, ability to use less raw material, and potential to be more easily recycled, especially as new technologies are developed for more efficient sorting and processing"



Digitalization in packaging

As the world continues to digitize, industries are evolving to meet new consumer expectations. As brick-and-mortar stores and restaurants embrace e-commerce, packaging is transforming with the evolving digital age. In an increasingly connected world, brands seek to convey their authenticity and values while avoiding packaging that feels crowded or overwhelming. This is where advanced technologies such as RFID tags, barcodes and NFC chips come into play.

These innovations provide a simple way to add valuable information to packaging without cluttering its design. Consumers today are highly conscious of the products they purchase, seeking transparency about where their items come from and whether they are sourced sustainably. By incorporating RFID and NFC technologies, brands can offer instant access to product histories, supply chain information, ingredient sources and sustainability practices, giving consumers the confidence that their purchases align with their values.

QR codes effectively allow consumers to access additional product information, enhancing the packaging experience. Another growing trend is digital DRS (deposit return schemes), which reward sustainability-focused consumers for returning recyclable packaging while providing brands with valuable insights into product life cycles.

Digital watermarking is also gaining traction. This technology enables automated sorting of recycled plastic packaging, supporting the circular economy and making it easier to reuse plastic materials.

Flexible pouches

Flexible packaging is experiencing significant growth as more brands shift from rigid, heavy containers to lighter, more adaptable products. These packages not only reduce material usage, which cuts down on waste, but also offer a more sustainable alternative.

Innovations in sustainable materials are making flexible packaging even more eco-friendly, with advancements in recyclability and traceability. Brands increasingly opt for flexible packaging due to its lower carbon footprint, ability to use less raw material, and potential to be more easily recycled, especially as new technologies are developed for more efficient sorting and processing.



Intricate details

Consumers have a strong emotional connection with packaging, often influenced by the tactile experience it provides. Psychological studies show that physical effects such as foiling, embossing, debossing, unique colors, shapes and varnishes can trigger emotional responses in shoppers. These sensory experiences create a deeper bond with the product, leading to higher engagement and purchase intent.

For example, a luxury brand like Chanel uses embossed logos and high-quality foils on its packaging to evoke a sense of exclusivity and sophistication.

The technologies showcased at Labelexpo Americas 2024 highlight the increasing sophistication of finishing technologies. These advancements enable intricate cuts and embellishments that elevate the visual appeal of labels and are also becoming faster and more automated. This evolution is fueled by the need to keep pace with high-speed printing presses and the growing demand for customized designs.

Brands are increasingly seeking more intricate, personalized packaging, and these new finishing technologies are meeting the challenge by offering faster turnaround times and greater precision, allowing for greater flexibility and creativity in label production.



Scan the QR code to read more on branding and design

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Latin America: Reason for optimism



Economic growth remains sluggish, but market conditions are improving. James Quirk reports

As elsewhere in the world, the fortunes of the label market in Latin America ebb and flow with the prevailing economic currents. As noted previously in this annual review, economic growth in the region rebounded strongly in the wake of the pandemic before slowing down in 2023.

According to the World Bank, economic indicators for 2024 continue to look sluggish, with growth across Latin America and the Caribbean expected to decline to 1.8 percent this year from 2.1 percent in 2023. Growth in the region's two biggest markets, Mexico and Brazil, was forecast to decline to 1.7 percent and 2.8 percent, respectively, from 2023 expansions of 3.2 percent and 2.9 percent.

There is greater optimism for next year, however, with the region's economy predicted to accelerate to a 2.7 percent growth rate as interest rates stabilize and inflation falls.

Converters in Latin America are often reluctant to invest in an election year – with a new leader chosen in Mexico (as well as its biggest export market, the US) this year, converters in that country can be forgiven for being cautious with their spending. 'Mexico has been more challenging this year,' says Nick Vindel, Latin American sales manager for Heaford. 'Companies are opting to fix or modernize existing equipment rather than buy new. They have been wary of investing because of the election.'

John Vigna, Latin American sales manager for Mark Andy, is another to admit that 'an election year can affect business'. But if capital equipment expenditure has slowed, that doesn't seem to be the case for material consumption. Carolina Jaramillo, marketing director for Colombia-headquartered substrate manufacturer Arclad, says: 'Mexico this year was a market with a very interesting dynamic, driven by the supply of products to North America.'

Yupo North and South America sales manager Alex Cruz also notes the strength of the Mexican market and reports double-digit growth and 'no slowdown in sales' in the wider Latin American region. 'Molders are looking for locally printed products rather than importing from the EU or Asia. Our ability to train, support and supply local printers has been key.'

Wider region

Arclad's Jaramillo reports 'greater stabilization of inflation' in the region. 'In general terms, there is an upward trend in private household consumption,' she says. 'We see that the market is less turbulent, we perceive greater optimism, and it is an advantage for us because there is an opportunity to continue growing in agro-export, food and beverage, personal and home care, and other markets.'

Mark Andy, Heaford and Yupo all report strong growth in Central America in particular. 'Central America has been quite a surprise,' reports Yupo's Cruz. Vindel of Heaford says: 'Central America has always been a strong market for us, particularly Costa Rica, El Salvador and Guatemala. But now we increasingly receive orders from smaller regional countries, such as Honduras and Panama.'

"Mexico this year was a market with a very interesting dynamic, driven by the supply of products to North America"

In Colombia, meanwhile, 'the market has improved', Vindel continues. 'There has been more investment in the country. New customers are appearing and investing.' He says Brazil 'remains strong'.

Heaford ran a seminar in Argentina alongside its local distributor, and Vindel says market conditions are improving. 'Talking to Argentine converters was interesting. They want to invest, but it has been very difficult because of import restrictions and inflation. Things are improving. There was an optimism among converters – they were a lot more confident.'

Technology

Regarding technology, Mark Andy's Vigna reports increasing interest in hybrid presses. 'There is increasing demand for hybrid machines. If you can do everything in a single pass, so much the better. It's the future, and converters know it.'

Vindel notes that smaller companies from some of the region's less established markets are looking at higher-specification machines and increasingly thinking about automation. 'We sell very few manual machines nowadays. Converters, even in these smaller markets, have a need for automation.'

Arclad's Jaramillo agrees that sustainability has increased in importance among converters. 'It's no longer just a trend; it's a reality,' she says. 'In Colombia, Law 2232 came into force, banning single-use plastic and establishing important goals for recycled PET packaging by 2003, which represents an opportunity to migrate to recyclable self-adhesive solutions that help brands meet these goals.'

Yupo's Cruz says sustainability concerns are prompting increased interest in its synthetic materials for in-mold applications.

There is optimism that market conditions continue to improve in Latin America as inflation comes down – a positive omen for Labelexpo Mexico 2025 in Guadalajara, Mexico, set for April 1-3, 2025.

Vindel says: 'There will be challenges, but also opportunities. There is increasing stability in the region. Argentina and Venezuela are beginning to come back online. Brazil will continue to be strong. And having Labelexpo Mexico would be an advantage. It was a good show last time – we sold three machines from the show floor and a couple more off the back of it. This time, it could be even better because it is in Guadalajara, which is more of an epicenter for the local label market.'



Scan the QR code to read more in Labels & Labeling on that Latin American region

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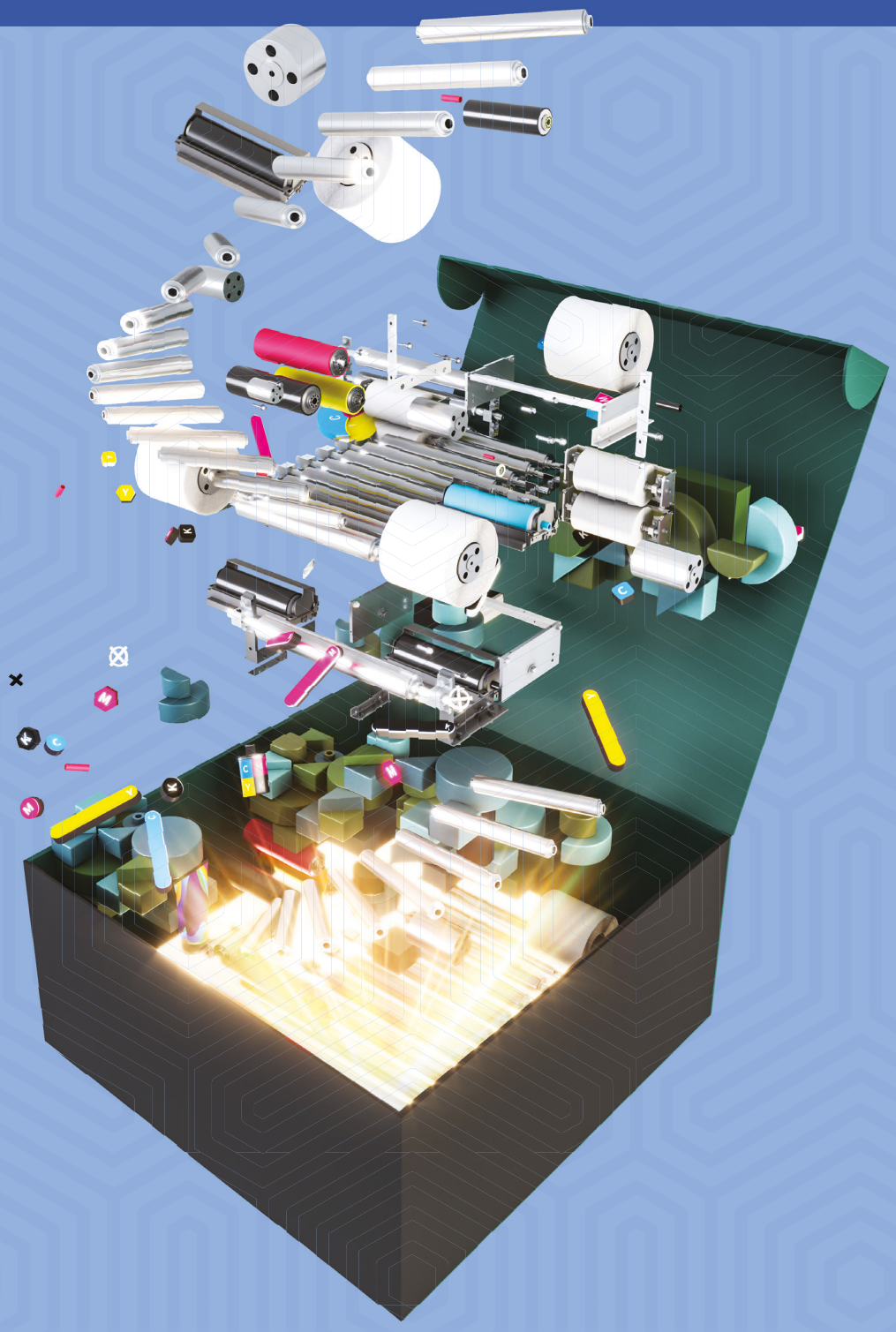

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India: Sustainability and automation propel growth

A confluence of factors, including economic shifts, technological advancements, and changing consumer preferences, significantly influenced the industry's trajectory. Adyasha Sinha reports.

The Indian label industry faced several challenges in 2024 when it was affected by global economic uncertainties and complex and ever-changing regulations, price pressures, thinning margins and intense competition driving some converters to undercut prices unsustainably. Many companies also faced challenges in adopting advanced machinery and subsequently, finding skilled operators to maintain consistent quality.

"Sustainability is not optional anymore; it's the future. Products and technologies that reduce carbon emissions and energy consumption will define the market"

With lessons learned and challenges met head-on, India's label and package printing sector is well-positioned for a promising future.

Industries fueling the growth

The last 12 months were pivotal for the Indian label and package printing industry. According to Mordor Intelligence, the Indian label market size is expected to grow from 2.17 billion USD in 2024 to 4.05 billion USD by 2029, growing at a remarkable CAGR of 13.29 percent. In terms of production volume, the market is expected to grow from 6.28 billion sqm in 2024 to 11.26 billion sqm by 2029 at a CAGR of 12.39 percent.

'FMCG (27.9 percent YOY) and food and beverage (11.05 percent CAGR) growth underscore this momentum,' says Amit Khurana, CEO at Technova Imaging Systems. 'Brands, driven by e-commerce, seek flexible, on-demand packaging as they prioritize lean inventory.'

Kulbhushan Malik, global business head at Cosmo Films, adds: 'Another promising trend is the growing demand for wraparound films, fueled by increased discretionary spending. With prolonged summer seasons driving higher beverage consumption, we're witnessing a corresponding rise in order volumes for these labels. This dual growth pattern signals a positive demand outlook for both specialty and non-specialty labels in our portfolio.'

Technologies charting the growth

Another notable trend was the shift toward more agile production systems and digital technology, which offer shorter turnaround times and cost-effectiveness for small batches and personalized products.

'I anticipate a continued shift towards short-run flexible packaging driven by growing demand for wider presses (430, 500, 550 and 650mm),' comments Manish Kapoor, sales manager at Nilpeter India. 'More well-established pressure-sensitive label converters will focus on consolidating relationships with reliable, long-term customers who value consistency over short-term cost savings.'

Taking a different approach, Patrick Graber, marketing director of narrow-mid web printing and converting at Bobst, adds: 'Demand for more automated equipment providing higher quality output, faster setup and improved ease of use to replace legacy machines, is a strong driver in in-line flexo. In addition, India's label market is growing considerably in volume, quality and diversity of labels, shrink sleeves and flexible packaging applications.'

This trend was also evident during Labelexpo India 2024. The Indian market saw increased adoption of digital label presses, signaling a shift toward more agile production systems. Automation also played a critical role, with manufacturers investing in robotics, cloud-based management systems and Industry 4.0 tools to enhance productivity and reduce downtime.

'There is a rising demand for digital printing,' agrees Ranesh Bajaj, director of Vinsak and Rotatek. 'Advancements in digital printing technology make short-run jobs highly efficient and cost-effective, especially for small to medium-sized businesses. As income and aspiration levels improve, there is a shift toward branded and quality products, resulting in the demand for premium packaging with embellishments and fine finishings.'

As brands seek innovative ways to make their products stand out on retail shelves, another notable trend coming to fore is the increasing adoption of embellishments.

'An important development is the increasing demand for embellishments on every label that's being printed,' comments Sandeep Sharma, director of Acme Rolltech. 'Everyone wants to do embellishment at a competitive cost. We have grabbed this opportunity with both ends and launched several pieces of machinery at Labelexpo India 2024.'

While brands continued investing in customizing and personalizing their products, they seemed equally invested in security.

'With rising concerns around counterfeiting, tamper-evident and holographic labels have become essential across industries,' notes Preeti Mishra, manager of business development at Holosafe Security Labels. 'Opportunities have emerged with digital transformation, particularly with smart labels, track-and-trace systems and RFID-enabled products in pharmaceutical and FMCG sectors.'

'Consumers and brands are increasingly demanding transparency in supply chains,' add Ankit Gupta and Shobhit Gupta, joint managing directors at Holostik India. 'Security labels and holograms will play a crucial role in ensuring product authenticity and traceability.'

Growing, the 'green' way

Sustainability defined 2024, with businesses transitioning to eco-friendly materials, such as recyclable liners and compostable films. Leading companies introduced water-based and UV-LED inks, reducing energy consumption and waste. The push for sustainable packaging was further amplified by government mandates under the Plastic Waste Management (Amendment) Rules, 2022, which tightened restrictions on single-use plastics.

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Africa: Short runs, significant impact

The African packaging market is on the rise, fueled by a young, urbanizing consumer base and an increasing demand for affordable, smaller-sized packaging options, Akanksha Meena reports

The African packaging market is valued at 43.48 billion USD in 2024. It is expected to grow to 52.52 billion USD by 2029, reflecting a CAGR of 3.85 percent over the forecast period (2024-2029), according to a report by Mordor Intelligence.

While South Africa remains the largest market for labels and packaging, foreign investors have been paying close attention to East African nations, particularly Kenya, Ethiopia, Uganda, Rwanda and Tanzania. As previously reported in Labels & Labeling, some economic experts predict that Africa will be the second fastest-growing major economy in the world behind Asia.

The rising number of young consumers is fueling the market, with an increased demand for consumer goods and growing individual incomes, particularly in East and West Africa. Consumers in this region prioritize value, favoring discounted and smaller package options.

Sachen Gudka, managing director of Skanem Interlabels Industries in Nairobi, affirms that the East African packaging industry is seeing growth in small SKUs in the short-run flexible packaging segment as consumers prefer buying smaller units of products due to the rising cost of living.

This also provides a substantial growth opportunity for converters in the region, as many families demand conveniently packaged goods across a wide array of fast-moving consumer goods.

Short-run label and packaging demand is driving converters to invest in digital print technology. As more brands seek customized, small-batch packaging with quick turnaround times, digital printing offers the flexibility, efficiency and cost-effectiveness to meet these demands. This shift allows converters to deliver high-quality, personalized packaging that appeals to niche markets and emerging brands, positioning them to stay competitive in a rapidly evolving market.

Kunal Chandaria, managing director of Digital Packaging Innovations Holdings (DPI), a converter in Kenya, says: 'I think customers are becoming more demanding with shorter runs and more SKUs. Quality also plays a big role. The African market is highly price-sensitive; customers seek top quality but are often reluctant to pay a premium for it. The market is seeing a rise in new small brands, leading to increased demand for short-run packaging with quick turnaround times for their products.

> **"The African market is highly price-sensitive; customers seek top quality but are often reluctant to pay a premium for it"**

Chandaria continues: 'Labels, such as peel and reveal, are still a novelty in this market, with none of the converters investing in them due to the capital expenditure. We at DPI are trying to educate some customers about the differences in using substandard labels from people with desktop printers or commercial printers who supply sheets with non-packaging material. Labels in this market can be world-class just by using the right printing technology and the right materials.'

Increasing competition

Among the biggest challenges in this region is the rising competitiveness among packaging manufacturers. An increasing number of offset printers are entering the market as packaging grows, which is a lucrative segment. Kenya, as the economic powerhouse of East Africa, boasts significant industrialization and a robust manufacturing sector. Many prominent FMCG brands, such as Nestlé, Coca-Cola, Diageo and Pernod Ricard, are based in this region.

Converters are working to capture market share by offering competitive pricing to brands, which in turn is leading to reduced profit margins. As a result, companies are diversifying into new product segments, such as stand-up flexible packaging with zippers, to capture better profitability.

This growth is both local and fragmented. Many converters now export to other countries within East Africa, intensifying regional competition.

Sustainability

Like the rest of the world, sustainability is also becoming a focus in East Africa.

Launched in 2021, The Kenya Plastic Pact is a collaborative platform led by Sustainable Inclusive Business, the knowledge center under the Kenya Private Sector Alliance (KEPSA), with support from WRAP – the UK-based global environmental NGO, MAVA and the Ellen MacArthur Foundation.

The platform unites companies, government agencies, NGOs, researchers and other key stakeholders, all working toward a shared vision of a circular economy for plastics. This initiative fosters cross-sector cooperation to drive sustainable change in Kenya's approach to plastic use, waste reduction and recycling. The Kenya Plastics Pact aims to achieve an ambitious set of 2030 targets to establish a circular economy for plastics.

Kenya Plastics Pact members have achieved a key milestone by developing the first version of the Design Guidelines for Recyclability, initially focusing on PET and HDPE bottles and jars.

These guidelines provide essential recommendations for designing plastic packaging that aligns with Kenya's existing and anticipated mechanical recycling capabilities. As recycling infrastructure evolves, these guidelines will be regularly updated to reflect advancements in collection, sorting and recycling technologies.

Kenya's Design Guidelines for Recyclability for PET and HDPE bottles and jars were launched in May 2023. Converters are developing sustainable labels and packaging to support the shift toward a circular economy. While there are ongoing efforts to promote sustainability in the market, the higher costs associated with sustainable packaging remain a significant challenge for many brands to adopt these eco-friendly options.

Scan the QR code to read more on the African market



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Asia-Pacific: Unpacking APAC potential

Multiple business intelligence firms have hailed the APAC region as one of the fastest-growing label markets globally. What's the secret behind this growth? Piotr Wnuk investigates

A recent report from Global Technology Intellect projects substantial growth in the region's label market, highlighting significant expansion opportunities. According to the findings, technological advancements and evolving consumer preferences drive innovation and demand, while supportive regulatory frameworks and rising awareness further bolster market growth.

Key growth drivers include rising interest in sustainable products and the increasing adoption of digital transformation. Durst's global sales manager for labels and flexible packaging, Thomas Macina, notes a distinct move towards sustainable and digital solutions. Brands focus on reducing waste and carbon footprints while leveraging more agile and efficient printing technologies to meet these evolving market demands.

'At Durst, we are well-positioned to support these needs with our advanced digital printing technologies that focus on reducing environmental impact without compromising on quality,' he says.

'The drive to digitization is supported by several market changes,' notes Jack Malki, director of Jet Technologies, a Sydney-based company with operations across the APAC region. 'Firstly, the difficulties in the supply chain and the unpredictable nature of the market lend themselves to label converters utilizing digital print in greater ways due to the flexibility and speed to market. That is further supported by sustainability drives as brand owners start to produce their products "on demand" rather than build substantial inventories of products and have some of those products end up in landfill when not consumed.

'Digital label printing is vital to shortening the entire supply chain for brand owners and producing everything as required with minimal waste, improving sustainability outcomes.'

Malki believes the current market opportunity is shifting towards more sustainable packaging. He notes that Asia appears to be lagging behind Europe and the US in this regard, presenting label converters with the chance to capitalize on these opportunities and secure significant client gains.

'Companies are increasingly adopting eco-friendly packaging and labeling materials, such as biodegradable or recyclable substrates,' says Jane Tan, managing director of Press Systems Group (PSG), a Thailand-based distributor serving Southeast Asia's print sector. 'At the same time, digital transformation plays a crucial role, with more businesses integrating automation, data-driven solutions, and digital printing to improve production efficiency, minimize waste and cater to shifting customer demands.

'Many customers require greener products to support their own sustainability commitments. We are working closely with our leading European suppliers to meet the growing demand for more sustainable products. This is evident in both the ink sector and UV curing, where scope emissions are analyzed. We believe PSG has a competitive advantage in these sectors as our European suppliers have been supporting customers in their home region with stricter environmental requirements.'

Consistent with John Ooi, an industry veteran known for his visionary sustainability approach in label and packaging markets and founder of Materials in Works, many businesses in the ASEAN region are investing in sustainable label materials, such as biodegradable and recyclable options, to meet both regulatory requirements and consumer preferences. Additionally, the shift towards digital printing is gaining momentum, offering advantages like reduced waste, lower inventory costs, and quicker turnaround times, which are crucial in the current fast-paced market.

"The APAC region's strength lies in its fast-paced innovation, adaptability, and strong manufacturing base"

'There is a clear shift towards sustainable packaging options, driven by both consumer preference and regulatory pressure,' confirms Paul Myatt, APAC regional service and support manager at Domino. 'Digital transformation is also a key trend, with more companies adopting digital printing technologies to improve efficiency, customization and reduce waste.'

The growth of the APAC region is driven by several factors, including its large and diverse population, accelerating urbanization, and the rapid expansion of industries such as e-commerce, pharmaceuticals and consumer goods. The region's capacity to swiftly adapt to shifting consumer behaviors and embrace technological advancements has further fueled its dynamic development. Additionally, the growth of infrastructure, the emergence of a burgeoning middle class, and the evolution of regulatory frameworks have all significantly strengthened the label market across the region.

'The APAC region's strength lies in its fast-paced innovation, adaptability, and a strong manufacturing base,' notes Durst's Macina. 'The rapid adoption of new technologies and a large, diverse market make this region one of the most vibrant and promising for the labels industry.'

Also, Malki agrees that the APAC region is an exciting place to be in, as it transforms from a low-income region into a middle- and higher-income one. 'As consumers in those regions start to have a higher disposable income, they start to consume more and more products, leading to substantial increases in their consumption of labels and packaging,' he says. 'We have been in Indonesia for around 11 years, and during that time, the minimum wage has more or less doubled. Vietnam, Malaysia and numerous other countries in the region have experienced similar wage growth. Combining that wage growth with a young and growing population results in substantial opportunities in those countries.'

Rapid industrialization and urbanization continue to drive label demand, while the market's swift adoption of technologies like digital printing and sustainable practices ensures it remains dynamic and competitive.

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China: Entering a fast-reforming period

China leads the global label industry with rapid growth, innovation and market dominance. Yolanda Wang reports

According to the data released by Zhongpu Industrial Research Institute, the total output value of China's printing market in 2024 exceeded 1.43 trillion RMB (197 billion USD), ranking first globally, showing its strong growth potential. The Chinese label printing industry is one of the fastest-growing areas.

China's label industry started in the late 1970s, later than in Western countries. Thanks to the continuous and stable growth of China's national economy, the growth rate of China's label market has stayed high, making it one of the fastest-growing markets in the world.

In the Asian label market, China's market share reached more than 60 percent. After years of development, China has become the world's largest label producer and consumer, accounting for about a quarter of global label consumption. In 2023, China's label printing industry was about 51.12 billion RMB (7 billion USD), increasing by 5.1 percent.

In China's label market, self-adhesive and wet glue labels are the most prominent applications, while shrink sleeves, in-mold labels, and variable data labels have significant market share.

As the largest self-adhesive label market in the Asia-Pacific region, the demand in the Chinese market continues to grow. Statistics from the label Printing Branch of the Printing and Equipment Industry Association of China (PEIAC) show that from 2017 to 2023, China's self-adhesive label production increased from 5.8 billion sqm to 9.98 billion sqm, with a CAGR of about 9.47 percent. This growth rate has slowed significantly compared to before the epidemic, as China's label printing industry has entered a stable growth and development stage.

Competition

In post-Covid China, many label companies showed signs of optimism in the market's recovery. They invested in production equipment that is faster and more automated, unleashing capacity that exceeded the market demand and led to intense competition among label peers.

Additionally, there have been new entrants to the label space from brand owners or packaging companies, thereby diverting the existing label orders. For example, China's listed package printing company ZRP announced its stake in AP Labels Guangzhou in May 2024.

> "In post-Covid China, many label companies showed signs of optimism in the recovery of the market"

According to incomplete statistics, the number of label converters in Chengdu and Chongqing has increased seven to 10 times compared with that 10 years ago. The reason is the reduction of the Chinese 'qualification conditions for printing companies', including the demand for the plant area, registered capital, and the number of printing equipment enterprises. Further, the reduced cost of printing equipment has lowered the threshold for entrants.

'For brand owners, as consumption habits are more rational, their budgets in packaging are shrinking, and the corresponding share of labels is also decreasing, which inevitably makes the competition between printers intensified and profits reduced,' says Shard Liu Jincheng, general manager of Megavision Design & Printing, a label converter in Chengdu, Sichuan Province.

This intense competition can also be linked to international companies leaving the Chinese market. In recent years, the outward migration of international foreign-funded enterprises in this area has become increasingly apparent, such as companies in food, clothing, footwear and wood industries, mainly moving to Southeast Asia, India and Mexico. Companies in pharmaceutical and chemical industries, machinery manufacturing and computer electronics are returning to the United States, Japan and other countries. In addition to the standard transfer caused by rising domestic labor costs, a large part of the reason is geopolitical factors.

So, how do we respond to the involution? Chai Zhengrong, operating director of Guangdong Doitpack, shares that 'The core is to establish differentiated market competitiveness. Since its establishment in 2019, Doitpack has adhered to technology research to lead the market and win the recognition of customers. We have experienced rapid growth in the past five years. In October 2024, we invested in the first HP Indigo 200K in China, our third HP digital flexible packaging press.'

Another example is a label converter in Guangdong Province. Since its establishment, it has focused on anti-counterfeiting labels. It has grown from 30 employees in 2018 to more than 120, with a 20,000sqm workshop and 40 percent annual growth in the past five years.

Digital technology

What's exciting is that driven by fierce competition, the reforming pace in China's label printing industry is accelerating. The converters use automated and digital technologies to increase the added value of labels, reduce production costs and improve efficiency through equipment upgrading.

Shanda Print invested in three Durst Tau 510 RSCi label digital presses, planning to replace the existing offset printing machines; Zhengzhou Yanfeng installed HP Indigo 6K, which is its second digital press, combined with the existing Omet flexo presses, to forge a new flexo and digital production mode; Henan Aili installed HanLabel hybrid printing equipment.

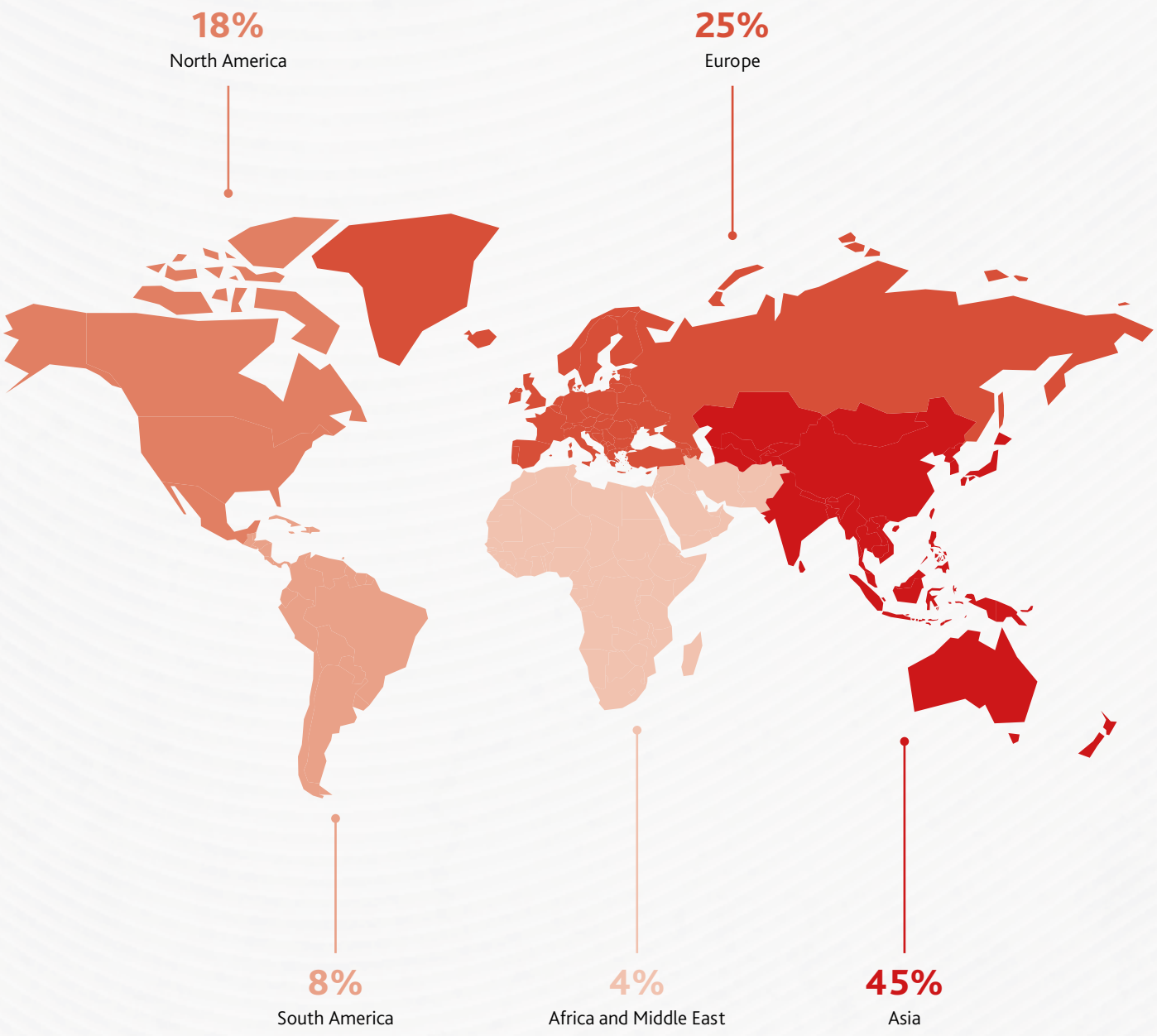
Digital printing and post-press technology have become one of the mainstream trends in China's label printing industry.

What's more, restructuring the global industrial chain has also driven the tide of Chinese enterprises going global. At Labelexpo Americas 2024, there were 92 Chinese exhibitors. Printing companies are also gradually laying out their overseas markets, such as ZRP, which established its first overseas production base in Vietnam in September 2024; label converter Heyuan Boyue has more than 90 percent overseas business. There are also converters establishing global trade platforms this year.

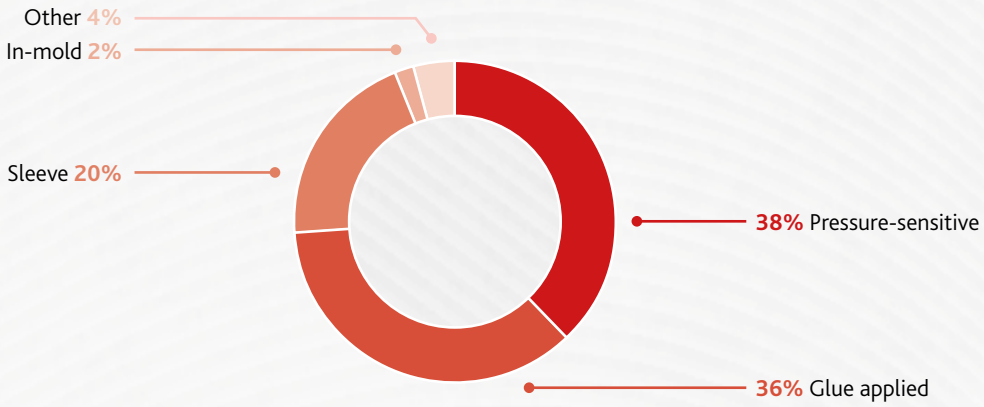
Scan the QR code to read more about the Chinese label market in Labels & Labeling

Label trends

Global label market by region



Global label market by technology (volume)



Global label market by end use

Beverage: **43%**

Food: **22%**

Transportation and logistics: **7%**

Household chemical: **6%**

Health and personal care: **5%**

Retail: **4%**

Pharmaceutical: **3%**

Industrial chemicals: **3%**

Automotive: **2%**

Consumer durables: **2%**

Office products: **1%**

2%

Other: **2%**

Source: AWA Alexander Watson Associates



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