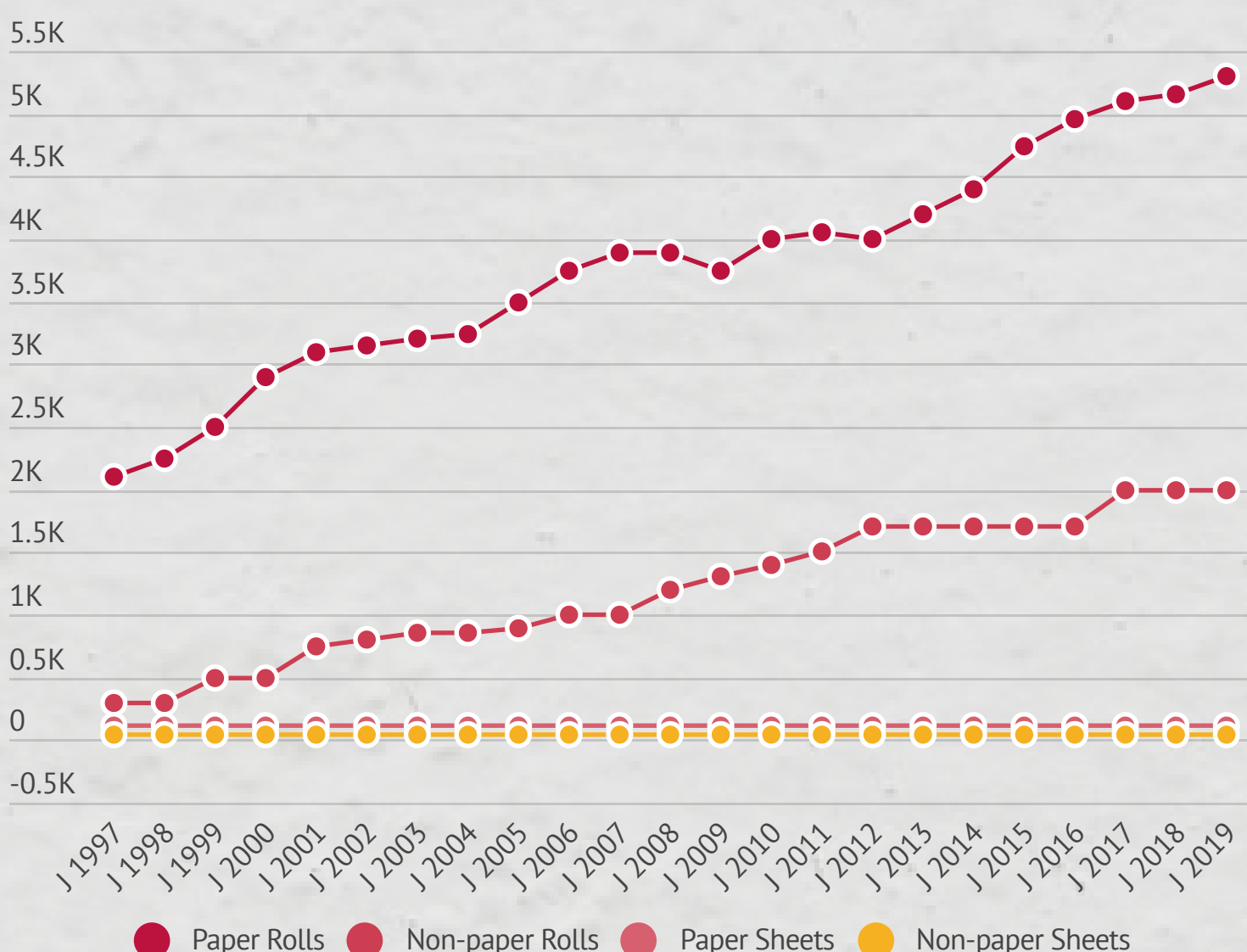


Pressure Sensitive Label Stock Demand 2019

Label Stock Demand Development 1996 – 2019 in Million m² Pressure Sensitive Labels



7.61

Billion m² in 2019



+1.6%

Increase on 2018



>2.5

Times Increase since 1996

Labelstock demand per grade | Paper-Based Materials



+1.3%

White Coated in 2019 Sales of packaged goods (esp. food), brand and product differentiation



+3.4%

Direct Thermal in 2019
Product identification, short-term variable data (e.g. on-line shopping, logistics, process automation, stock and inventory management)

Labelstock demand per grade | Filmic Materials



+3.2%

PP |
General need for high quality decoration films (esp. GBC, Spirits, Food), PP esp. because of better transparency (no-label-look), convertibly, cost



+3.4%

Direct Thermal in 2019
Product identification, short-term variable data (e.g. on-line shopping, logistics, process automation, stock and inventory management)



71%

WC, DT & PP from 66% in 2010 to 71% in 2019
Confirms on-going shift to higher-end applications, but all slowed down 2019



-2.6%

Sheet Materials | Better production facilities and need of rolls for automatic dispensing machines

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TOP 10 EU28 and TOP 3 Non-EU in 2019



75%

Top 10 EU = 75% of total European market (5.6 Billion m²)



85%

Top 10 Eu + Top 3 Non-EU = 85%



6

6 countries with above average growth



4

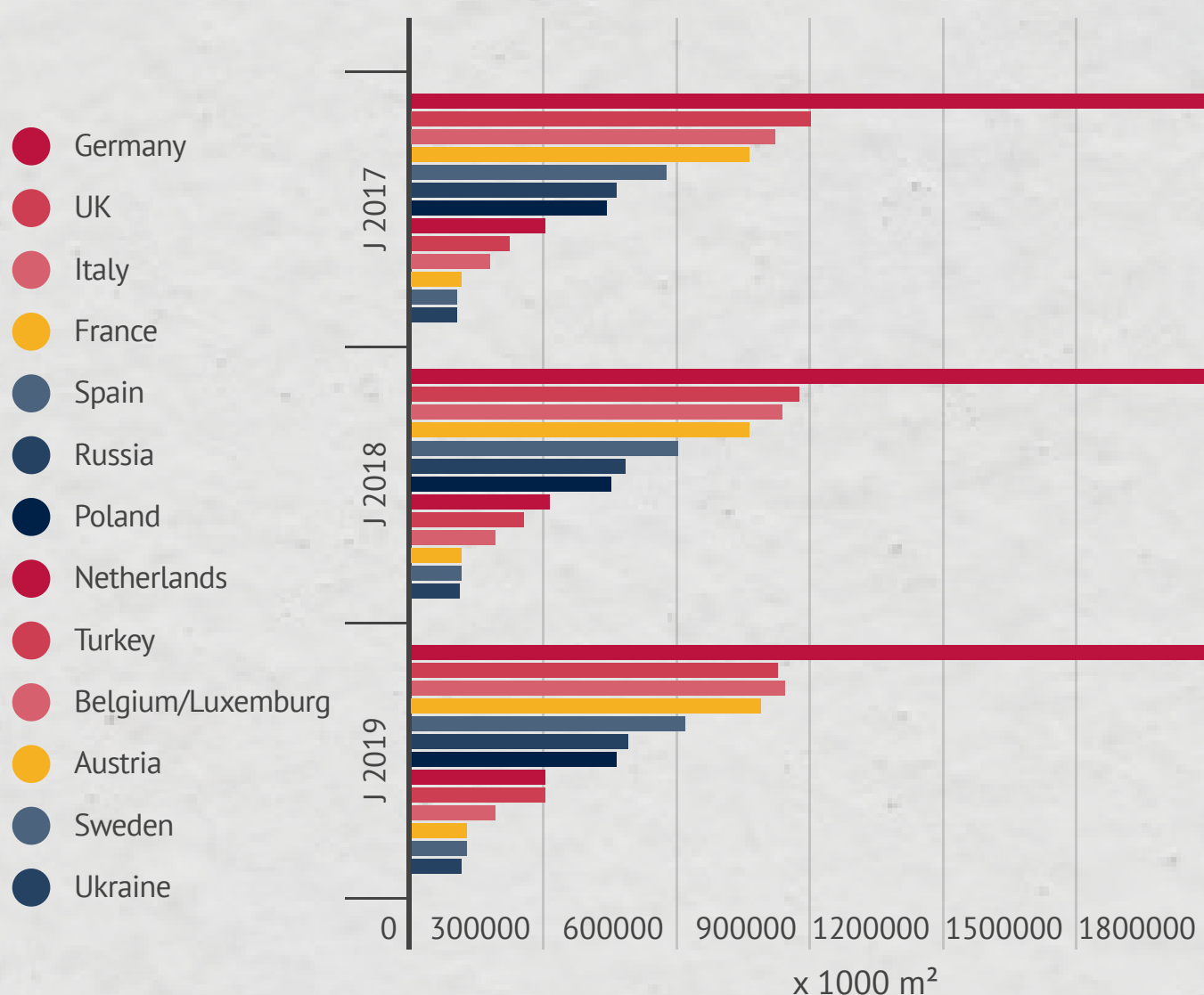
4 countries with static or slow growth



3

3 countries with declining market

By Region



By region 2019 | (2018) MARKET DEMAND DEVELOPMENT



+1.6%

EUROPE OVERALL 1.4% in 2018



2.3%

NORTHERN EUROPE -2% in 2018



-1.5%

UK & IRELAND -1.2% in 2018



-1.3%

CENTRAL EUROPE 0.9% in 2018



+3.1%

SOUTHERN EUROPE 1.8% in 2018



+4.0%

EASTERN EUROPE +3.5% in 2018