IN-MOLD DECORATING ASSOCIATION

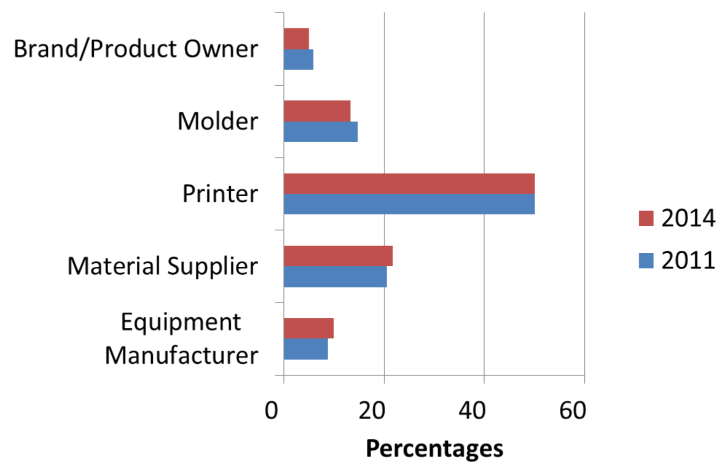
Real Experts, Real Answers, Real Value

Fall 2014 Short Shot Business Survey Results

Analysis of data from the Fall, 2014 Short Shot Business Survey produced some interesting findings. The results from this most recent survey of the in-mold labeling (IML) and in-mold decorating (IMD) industry were compared against answers to the same six questions posed in our Spring, 2011 survey. The number of respondents to the 2014 survey was almost double those who answered in 2011.

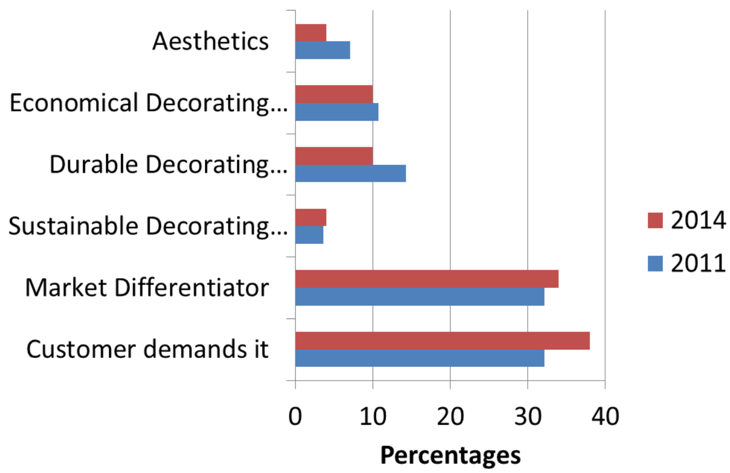
The results of the 2014 survey are strikingly similar to those from 2011. Here are some highlights of the analysis: *(These charts compare the new 2014 survey results with those from 2011)*

WHO RESPONDED TO THE SURVEY?



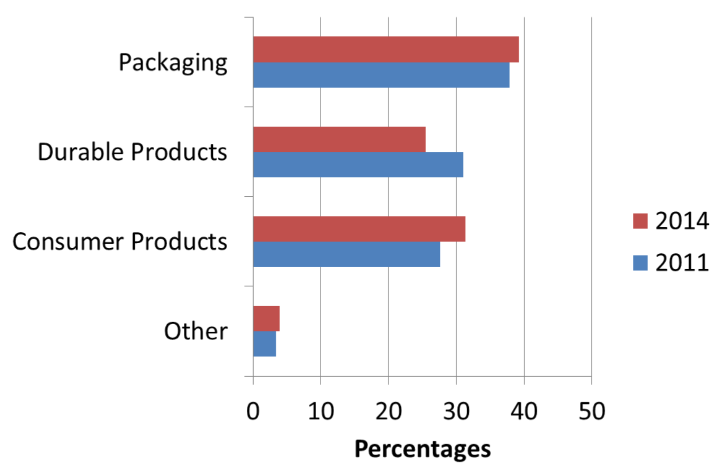
The profile of the survey participants largely reflects the makeup of the industry: Fifty percent in-mold label printers, 21% material suppliers (label substrates, inks, etc), 13% molders, 10% equipment suppliers and 5% brand owners.

WHY DO YOU DO IML/IMD?



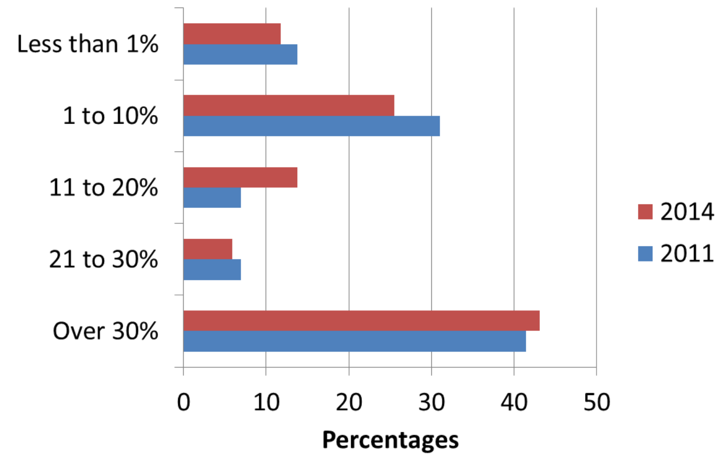
Thirty-eight percent said their customers demand it, up from 32% in 2011. Thirty-four percent said IML/IMD is a market differentiator, up from 32% in 2011. Ten percent said IML/IMD is a durable decorating method, down from 14% in 2011.

WHAT ARE THE TARGET MARKETS FOR YOUR PRODUCTS?



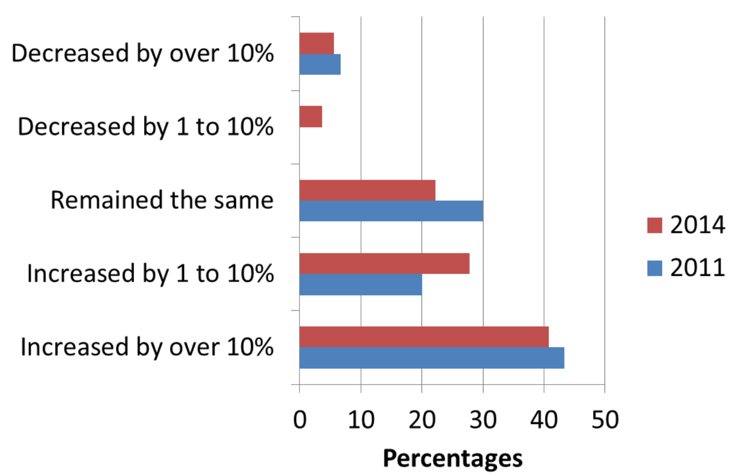
Target markets have shifted slightly from 2011 to 2014. Packaging increased from 38% to 39% from 2011 to 2014 while durable products dropped from 31% to 26% over the same period.

HOW MUCH OF YOUR BUSINESS IS IML OR IMD RELATED?



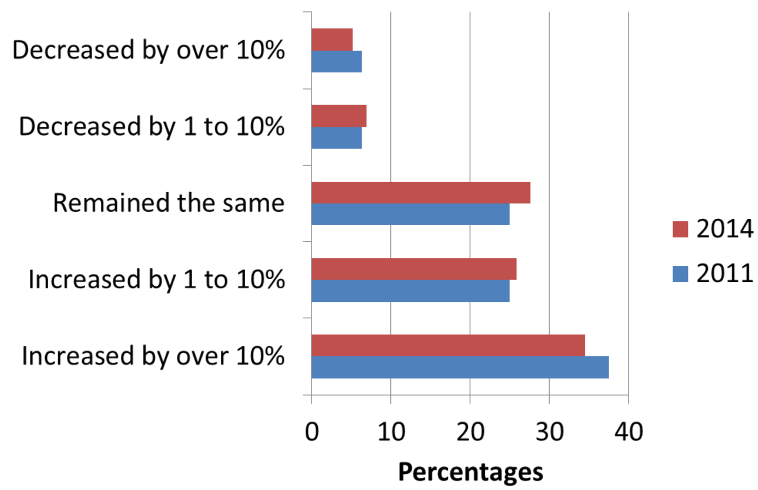
The most significant change in IML/IMD as a percent of respondents' total business was in the 11 to 20% range, increasing from 6.9% in 2011 to 13.7% in 2014.

HOW DID IML/IMD SALES COMPARE TO THE PREVIOUS QUARTER?



An important measure of IML/IMD growth for 2014 are the companies reporting 1 to 10% growth (27.8%) and those reporting more than 10% growth (40.7%).

HOW WERE REQUESTS FOR QUOTES OR PROPOSALS FOR FUTURE IML/IMD BUSINESS?



This measure of future business "in the pipeline" continues strong, with 28% reporting requests for quotes the same as the previous quarter, 26% an increase of one to 10% and 35% said these requests increased by more than 10%. The level of new requests for quotes at 61% is a strong indicator of the continued growth in IML and IMD business into 2015.

Conclusion:

With the exception of a slight shift in target markets from durable to consumer products, the results of the 2014 IMDA Short Shot Business Survey closely mirrors those obtained in 2011. Increases in IML/IMD sales for the previous quarter plus the high volume of new requests for quotes and proposals indicates continued strong growth for in-mold labeled and in-mold decorated products into 2015.