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# Caps & Closures: United States

February 2021



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# About This Report

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## Scope

This report forecasts to 2024 US cap and closure demand in units, and demand and shipments in nominal US dollars at the manufacturer level. Total demand in units is segmented by material in terms of:

- plastic
- metal
- rubber
- cork

Total demand in units is also segmented by market as follows:

- bottled water
- carbonated soft drinks
- other beverages such as beer, milk, and wine
- pharmaceuticals
- food
- other markets such as cosmetics and toiletries, household chemicals, and paint and coatings

To illustrate historical trends, total demand in units is provided in annual series from 2009 to 2019; total demand and total shipments in dollars, and the various segments in units are reported at five-year intervals for 2009, 2014, and 2019.

This report analyzes the market for caps and closures. The closures included herein are those used on containers intended for disposal after use. A significant degree of overlap exists among product categories. For example, some trigger dispensers are outfitted with child-resistant features. For purposes of this report, a closure is categorized by the primary function of the closure. In the example here, the closure would be categorized as a child-resistant closure.

Excluded from the scope of this report are:

- caps and closures that are an integral part of the container (e.g., aerosol can valve assemblies, metal and composite can tops, peel-up aluminum lids)
- home canning and bottling closures
- glass and paperboard closures
- closures for industrial bulk containers
- flexible closures such as twist ties or foil lidding

## About This Report

- caps and closures used in nonpackaging applications (e.g., valve covers, distributor caps, pen caps, food storage containers lids, liquor decanter closures)

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Caps & Closures: United States (FF30012)* is based on *Global Caps & Closures*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 6 | NAICS & SIC Codes Related to Caps & Closures

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
321999	All other miscellaneous wood product manufacturing	2499	Wood products, not elsewhere classified
326199	All other plastics product manufacturing	3069	Fabricated rubber products, not elsewhere classified
326299	All other rubber product manufacturing	3089	Plastic products, not elsewhere classified
332119	Metal crown, closure, and other metal stamping (except automotive)	3466	Crowns and closures

Source: US Census Bureau

# Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Caps & Closures*

### Freedonia Industry Studies

*Cannabis Packaging Opportunities*

*Converted Flexible Packaging*

*Food & Beverage Packaging Innovation*

*Food Containers in the US*

*Global Packaging Machinery*

*Global Pharmaceutical Packaging*

*Global Protective Packaging*

*Global Single-Use Plastic Packaging Regulations*

*Global Thermoplastic Elastomers*

*Medical Device Packaging*

*Pharmaceutical Packaging*

*Protective Packaging*

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**Agencies & Associations**

American Chemistry Council

Beer Institute

Can Manufacturers Institute

International Bottled Water Association

International Organization of Vine and Wine

United States Alcohol and Tobacco Tax and Trade Bureau

United States Census Bureau

United States Department of Agriculture

United States International Trade Commission

Wine Institute