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# World Caps & Closures

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Industry Study with Forecasts for **2011 & 2016**

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Study #2211 | July 2007 | \$5500 | 329 pages

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**The Freedonia Group**

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: [info@freedoniagroup.com](mailto:info@freedoniagroup.com)

[www.freedoniagroup.com](http://www.freedoniagroup.com)

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*Unit gains will continue to be driven by the penetration of closure-intensive plastic packaging into traditionally closureless types such as gabletop and aseptic drink cartons and plastic pouches.*

## World demand to rise 4.7% annually through 2011

Global demand for caps and closures is forecast to expand 4.7 percent per year through 2011 to \$32 billion, representing 1.4 trillion units. Accelerating economic growth and rising personal incomes will support development of consumer nondurable goods markets, especially in the world's emerging economies, with closures and other packaging materials among the primary beneficiaries.

Unit gains will continue to be driven by the penetration of closure-intensive plastic packaging at the expense of traditionally closureless packaging media such as gabletop and aseptic drink cartons and plastic pouches. Limiting growth will be heightened competition from packaging formats that do not use closures, such as blister packs and stand-up pouches.

Sales revenues will be fueled by a shift in the product mix in favor of value-added closure types that provide increased product safety, user convenience and/or shelf appeal. Examples include tamper-evident, child-resistant and dispensing types.

## China, India to perform strongly in unit gains

Above-average gains are expected in the world's emerging markets, especially those in Asia. China will lead the way, accounting for over one-fourth of projected unit gains in global cap and

## World Cap & Closure Demand (\$25.3 billion, 2006)



closure demand through 2011. However, due to relatively low prices, it will account for only 16 percent of value gains. India will also perform strongly. The US, which accounts for almost one-fourth of global cap and closure value demand, also enjoys generally favorable prospects (fueled by a continued shift in the product mix toward value-added configurations). Western Europe and Japan will see slower growth, hindered by mature markets and stagnant population growth.

## Plastic to continue supplanting metal, cork

Plastic closures will continue to supplant traditional metal and (increasingly) cork types, supported by technological

advances and the ongoing shift from glass to plastic and paperboard in consumer packaging applications such as soft drinks and pharmaceuticals. Beverages will remain the dominant market for caps and closures, accounting for almost 65 percent of unit demand in 2011. In the beverage sector, strongest gains are expected in the bottled water segment, with nontraditional products such as sports drinks and flavored milk also performing favorably. Healthy growth is also anticipated in consumer chemical markets such as cosmetics, toiletries and household cleaners, which are enjoying rapid growth and becoming more intensive users of packaging in the developing world.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

**India: Markets --** Demand for caps and closures in India register strong gains in virtually all markets, with soft drinks being the most important category and accounting for 35 percent in 2011 demand. The market prospects among all sectors in 2003 through 2005. Soft drink sales in India declined as a result of the ban on plastic bottles, leading allegedly improper use by Coca-Cola. Excessive groundwater usage in some areas of the country has also been a concern. However, from 2000-2002, cap and closure sales in India grew at an annual pace of close to 25 percent -- portending a bright future growth if these concerns are resolved.

**SAMPLE TEXT**

Relative to the world average, gains in cap and closure sales in India will be particularly pronounced in the pharmaceutical sector. The country bolsters its position as a leading exporter of drugs. A number of local companies, such as Cipla, Dr. Reddy's Laboratories and Ranbaxy Laboratories, have become globally renowned. Indian generic drug manufacturers now produce low-cost AIDS drugs for over 50 percent of the 1,000,000 or so HIV patients taking antiretroviral medicines in developing countries, bolstering the domestic market for pharmaceutical packaging products (albeit of the low-cost variety).

A new bill passed by India's parliament in early 2005 will make it illegal for local firms to make generic copies of patented drugs. However, this will be countered by increasing foreign investment in production and research and development activities) in the pharmaceutical sector on the part of the world's leading drug companies. In addition, the new bill does not ban certain generic products, including AIDS-related drugs.

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TABLE VI-8

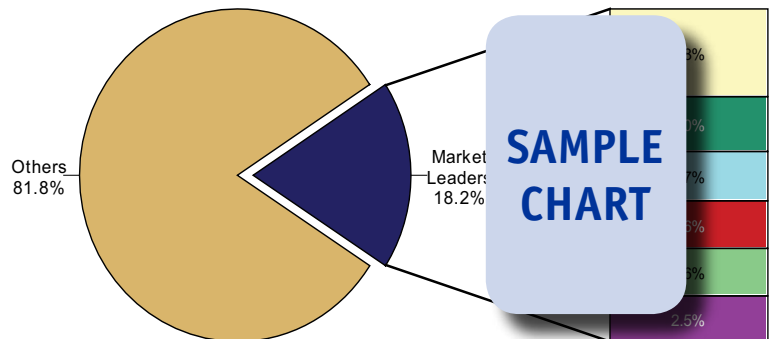
### INDIA -- CAP & CLOSURE SALES BY MATERIAL & MARKET (million units)

Item	1996	2001	2006	2011	2016
Cap & Closure Sales (mil \$)	170	380	550	850	1290
cents/unit	0.9	1.3	1.4	1.5	1.6
Cap & Closure Sales	100	200	300	450	650
By Material:					
Plastic*	60	120	180	270	380
Metal	40	80	120	180	270
By Market:					
Beverages:					
Beer	10	20	30	45	65
Carbonated Soft Drinks	50	100	150	225	325
Bottled Water	10	20	30	45	65
Other	10	20	30	45	65
Food	10	20	30	45	65
Pharmaceuticals	10	20	30	45	65
Other	10	20	30	45	65

**SAMPLE TABLE**

CHART VIII-1

### WORLD CAP & CLOSURE MARKET SHARE, 2006 (\$25.3 billion)

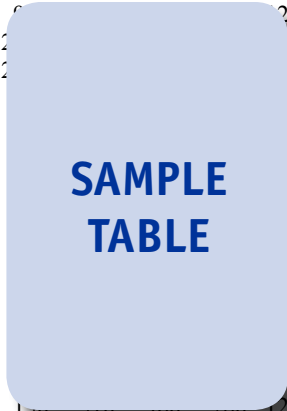


**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE VI-7**  
**INDIA -- CAP & CLOSURE SHIPMENTS & SALES**

Item	1996	2001	2006	2011	2016
Population (million persons)					273
\$ GDP per capita					30
Gross Domestic Product (bil 2005\$)					100
% food & bev					1.4
Food & Bev Value-Added (bil 2005\$)					3.4
\$ C&C/capita					1.0
\$ C&C/000\$ GDP					18
\$ C&C/000\$ food & bev					2.5
Cap & Closure Sales (mil \$)					90
net exports					70
Cap & Closure Shipments (mil \$)					1220



### COMPANY PROFILES

**Pelliconi & C. SpA**  
 Via Emilia 314  
 40064 Ozzano Emilia ITALY  
 39-51-651-2611  
<http://www.pelliconi.com>

Sales: \$  
 Employ:

Key Pro  
 pilfer-pr

Pel  
 crowns ;  
 ery used



aluminum roll-on  
 uction of bottle  
 also makes machin-

The Company's closures include bottle crowns, plastic closures and aluminum roll-on pilfer-proof (ROPP) closures. Pelliconi has the capacity to manufacture over 30 billion metal and plastic bottle caps annually. Among the Company's standard range of bottle crowns are 26 millimeter (mm) and 29 mm designs. Pelliconi produces 26-mm crowns in twist dry blend, pry-off dry blend and pry-off PLASTISOL varieties. In addition to its standard line of 26-mm bottle crowns, the Company manufactures promotional 26-mm crowns with removable polyvinyl chloride (PVC) and PVC-free liners; promotional crowns with ink jet printing; and TWIST SOFT TOUCH 26-mm crowns, which are designed to enhance user comfort when the crown is gripped and turned. Pelliconi's 29-mm crowns include pry-off models for champagne and water bottles.

Among Pelliconi's plastic closures are two-piece high density polyethylene caps, including STRETCH LOK products. Other plastic

"Demand for caps and closures in India totaled \$550 million in 2006. Despite its vast population, the market for packaged goods in India is relatively small. In addition, a majority of caps and closures are of the low-cost metal type used in carbonated beverages. Nevertheless, a continuing strong and sustained economic expansion through 2011 will result in the market for caps and closures in India growing a strong 9.1 percent per year to \$850 million. The country's trade deficit will contract moderately to ..."  
 --Section VI, pg. 169

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**OTHER STUDIES**

**Active & Intelligent Packaging**

US demand for active and intelligent packaging will grow 13% yearly through 2011. Intelligent packaging will grow the fastest, driven by the emergence of lower cost time-temperature indicator (TTI) labels. Active packaging will be paced by gas scavengers. Pharmaceuticals, beverages and food will offer the best market prospects. This study analyzes the US active and intelligent packaging industry, with forecasts for 2011 and 2016 by product and market. It also details market share and profiles major players.  
 #2236 ..... 08/2007..... \$4400

**Food Containers: Rigid & Flexible**

US food container demand will reach \$23.5 billion in 2011. Growth trends include heightened demand for more convenient foods and a shift toward value-added packaging. Plastic containers, and bags and pouches will log the fastest growth. Meat and dairy products and frozen specialties will lead gains by market. This study analyzes the 263 billion unit US food container industry, with forecasts given for 2011 and 2016 by product and market. It also evaluates company market share and profiles major players.  
 #2208 ..... 07/2007..... \$4500

**Beverage Containers in China**

Demand for beverage containers in China will grow 8.9% per annum through 2010. Plastic will remain the dominant material in unit terms while paperboard will grow the fastest. Milk will stay the largest market and be one of the fastest growing, with fruit beverages posting the fastest gains. This study analyzes the ¥60.5 billion beverage container industry in China, with forecasts for 2010 and 2015 by market and material. The study also evaluates company market share and profiles leading industry participants.  
 #2183 ..... 05/2007..... \$4900

**Cups & Lids**

US cup and lid demand will grow 4.3% annually through 2010, driven by a favorable outlook for key foodservice markets (e.g., quick service restaurants, coffee shops). Lids will outpace cups based on an increasing percentage of drinking cups using lids, growing demand for higher-value specialty lids and continued gains for single-serving packaging cups. This study analyzes the \$5.5 billion US cup and lid industry to 2010 and 2015 by product and market. It also details market share and profiles major players  
 #2154 ..... 01/2007..... \$4300

**Dairy Packaging**

US demand for dairy packaging will grow 4.1% annually through 2010. Gains will be driven by trends toward smaller containers and more food eaten or prepared away from home. Best growth is expected in cultured dairy products such as drinkable yogurt and in cream. Pouches and bottles will present the best opportunities by product. This study analyzes the \$3.5 billion US dairy packaging industry to 2010 and 2015 by application, product and material. It also details market share and profiles major players.  
 #2105 ..... 10/2006..... \$4400

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