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Cosmetic & Toiletry Containers

US Industry Study with Forecasts for **2012 & 2017**

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US Industry Study with Forecasts for ***2012 & 2017***

Table of Contents

(continued on next page)

Table of Contents

COMPANY PROFILES

(continued from previous page)

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

CONTAINER OVERVIEW

PLASTIC CONTAINERS

PAPERBOARD CONTAINERS

GLASS CONTAINERS

METAL CONTAINERS

MARKETS

INDUSTRY STRUCTURE

Cosmetic & Toiletry Containers

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Container advances will reflect accelerating growth in cosmetic and toiletry product shipments, driven by favorable domestic demand and opportunities for cosmetic and toiletry exports.

US demand to rise 2.8% annually through 2012

US demand for cosmetic and toiletry containers is projected to increase 2.8 percent per year to 25.5 billion units in 2012. In dollar terms, sales will rise 4.0 percent yearly to $4.4 billion, decelerating from the 2002-2007 pace based on more stable material pricing. Container advances will reflect accelerating growth in cosmetic and toiletry product shipments, driven by favorable domestic demand and opportunities for US-produced cosmetics and toiletries in offshore markets.

US Cosmetic & Toiletry Container Demand, 2007
(22.3 billion units)

Dominant plastic types to be fastest growing

Among material types, plastic will register the fastest growth through 2012 in both units and value. Growth will be aided by a relatively favorable cost structure and healthy shipment expansion in a number of key applications, such as hair and skin care products and cosmetics. Continued material and processing improvements will provide enhanced container aesthetics and performance, and enable plastics to further penetrate prestige applications.

Though more moderate prospects are anticipated for paperboard, glass and metal containers as a result of market maturity and competitive drawbacks, growth opportunities will exist. For example, advances in full-body can shaping will continue to broaden the range of applications for aluminum aerosols, thereby giving metal a growth niche. While demand for folding cartons will be constrained by source reduction efforts, continued usage with prestige goods and the upscaling of mass brands will stimulate demand for higher value folding cartons that increase the quality perception of products or serve to differentiate products. Glass container demand will register a modest increase as glass holds its niche against the encroachment of plastics in key applications where glass remains prevalent -- cosmetics (i.e., nail enamels and, to a lesser extent, facial cosmetics) and fragrances.

Skin care, liquid soap to be fastest growing markets

Through 2012, the fastest growth is anticipated in the skin care and liquid soap markets. The cosmetics and oral care markets will advance approximately in line with the overall cosmetic and toiletry container average, with both benefitting from heightened demand for innovative performance-driven formulations (e.g., tooth whiteners, mineral makeup). The hair care, fragrance, deodorant and antiperspirant, and shaving markets will expand more moderately, though the positioning of mass brands closer to prestige types will support value gains for packaging through greater use costlier containers.

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Sample Text, Table & Chart

TABLE VII-2

METAL COSMETIC & TOILETRY CAN & BOTTLE DEMAND BY TYPE & MATERIAL (million units)

Item	1997	2002	2007	2012	2017
Metal C&T Container Demand					
% cans & bottles					
Metal C&T Can & Bottle Demand					
By Type:					
Aerosols					
Other					
By Material:					
Steel					
Aluminum					

SAMPLE TABLE

PLASTIC CONTAINERS

Plastic Bottles

Demand for plastic bottles for cosmetic and toiletry pac projected to climb 3 billion units i Gains will result f ends in market bottles are used as cosmetic and to dustry. For instan efit from favor in demand for ski esult of rising i more sophisticate asingly mature Bottle opportunities ntinued favorabl for tooth whiteners and liquid soaps. Expanded retail options for the purchase of hair, skin, cosmetic and fragrance products, such as salons, spas, home shopping networks and Internet sites, will provide additional momentum for bottles. The growing use of exclusive brands by various retailers will also boost demand for bottles.

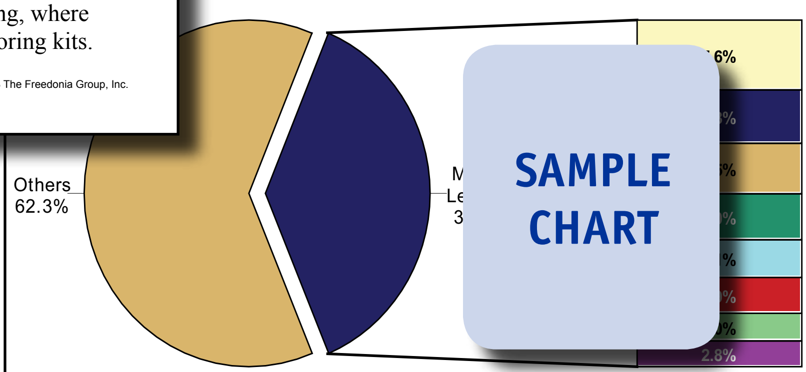
SAMPLE TEXT

In addition, plastic bottle unit demand will further benefit from heightened requirements for trial-sized containers as a result of the need to comply with airline security regulations restricting carry-on liquid and gel toiletries to sizes of three ounces or less per container. Growth for trial-sized bottles is also anticipated in well-established markets for these containers, including hotels and other lodging establishments, spas and institutional establishments, such as hospitals. Moderating gains for plastic bottles will be below-average advances in hair care products, which are by far the largest cosmetic and toiletry application for plastic bottles. Hair care product container demand will be constrained by market saturation, especially in shampoos and conditioners. Additionally, relatively slow growth for bottles for hair coloring products will be the result of marginal increases in the 45-54- year-old age segment and the tendency among some consumers over 60 to stop coloring their hair. The preference for custom colors and effects such as highlighting will lead a growing number of consumers to opt for salon coloring, where bottle use per treatment is not as high as with home hair coloring kits.

55

CHART IX-1

IC & TOILETRY CONTAINER MARKET SHARE, 2007 ($3.6 billion)



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Sample Profile, Table & Forecast

TABLE VIII-9

SKIN CARE PRODUCT CONTAINER DEMAND BY APPLICATION (million units)

Item	1997	2002	2007	2012	2017
Skin Care Product Shpts (mil 2000$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
units/000$ skin care shpts	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Skin Care Container Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Creams & Lotions	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Skin Cleansers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Sun Care Products	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
cents/unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Skin Care Containers (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% skin care	18.3	21.2	21.7	23.3	24.8
Total C&T Container Demand (mil $)	2270	2735	3625	4420	5500

SAMPLE TABLE

COMPANY PROFILES

Colt's Plastics Company Incorporated
969 North Main Street
Dayville, CT
860-774-227
http://www.c

Annual Sales
Employment:

Key Products

SAMPLE PROFILE

Colt's Plastics is a privately held manufacturer of stock, modified stock and custom injection and compression molded containers, closures, trays and other plastic components, mainly for the cosmetic, toiletry and pharmaceutical industries. In addition, Colt's Plastics provides design and decorating services, including silkscreening, hot stamping and vacuum metallizing.

The Company is active in the US cosmetic and toiletry container industry through the production of plastic jars and stack kits for the cosmetic and personal care industries. Colt's Plastics operates a 140,000-square-foot production facility at its headquarters site in Dayville, Connecticut. This plant houses nearly 30 injection presses and approximately 25 rotary compression molding presses.

Stock containers are manufactured with capacities ranging from 1/32 ounce to 20 ounces. The Company's plastic jars are marketed primarily through the COLT-AINER product line and are used to package various creams, gels, powders, pressed powders, glosses, glitters, pads and spa-line products. Specific models include the following: standard; pan; low profile; radiused, pedestal and special two-piece; standard

276

"Demand for containers for packaging skin creams and lotions is forecast to expand 4.4 percent per year to 3.4 billion units in 2012. Growth will be driven by robust prospects for more sophisticated products aimed at the increasingly mature population as well as solid demand for hand and body creams and lotions incorporating value-added ingredients which are designed to provide benefits more typically found in facial skin creams. Container advances will be supported by ..."
--Section VIII, pg. 165

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Other Studies

Caps & Closures

This study analyzes the US cap and closure industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by raw material (e.g., plastic resins, metal); product (e.g., threaded, dispensing, unthreaded, child-resistant, screw and lug, crowns, roll-ons, rubber, cork); and market (e.g., beverages, food, cosmetics and toiletries, pharmaceuticals, household cleaning products). The study also considers market environment factors, evaluates company market share and profiles major players.

#2354 .... 05/2008..................... $4700

Protective Packaging

The US protective packaging industry is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by type (e.g., molded foam, foamed-in-place polyurethane, polyolefin rolls, protective mailers, bubble packaging, insulated shipping containers, paperboard protectors, paper fill, inflatable bags, loose fill); function and market. The study also considers market environment factors, details industry structure, evaluates market share and profiles leading competitors.

#2316 .... 05/2008..................... $4500

Labels

US label shipments will grow 5.1% annually through 2011. Best opportunities are anticipated for the dominant pressure sensitive segment. However, stretch sleeve and heat shrink labels will grow the fastest. Paper will remain the largest stock material but will continue losing market share to plastic. This study analyzes the $14.3 billion US label industry, with forecasts for 2011 and 2016 by material, application method, printing technology and function. It also details market share and profiles leading producers.

#2268 .... 12/2007..................... $4500

World Pharmaceutical Packaging

World pharmaceutical packaging demand will grow 5.9% annually through 2011. Western Europe, the US and Japan will continue to account for most demand while China, India and Brazil lead gains. Prefillable inhalers and syringes will grow the fastest while plastic bottles will remain dominant. This study analyzes the $25.8 billion world drug packaging industry, with forecasts for 2011 and 2016 by material, product, world region and for 30 countries. It also details market share and profiles major players.

#2213 .... 07/2007..................... $5800

World Caps & Closures

Global demand for caps and closures will grow 4.7% annually through 2011. Unit gains will be driven by the penetration of closures into gabletop and aseptic drink cartons and plastic pouches. Emerging markets will perform strongly, led by China and India. Plastic closures will continue to supplant metal and cork. This study analyzes the $25.2 billion cap and closure industry, with forecasts given for 2011 and 2016 by material, market, world region and for 17 countries. It also details market share and profiles major firms.

#2211 .... 07/2007..................... $5500

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