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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

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# Caps & Closures

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

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Study #2354 | June 2008 | \$4700 | 308 pages

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## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General .....	4
Macroeconomic Outlook .....	5
Demographic & Household Trends .....	10
Consumer Income & Spending Trends .....	14
Manufacturing Outlook.....	16
Packaging Trends .....	18
Container Overview .....	22
Types.....	24
Markets & Materials.....	27
Plastic .....	28
Metal.....	30
Glass .....	32
Paperboard .....	35
Historical Market Trends.....	37
Pricing Trends.....	40
Environmental Issues.....	42
Regulatory Issues.....	44
Global Trends .....	47
Foreign Trade .....	48

### RAW MATERIALS

General .....	52
Plastic Resins .....	54
Polypropylene .....	56
Polystyrene.....	58
Polyethylene .....	58
Other Resins .....	60
Metal .....	62
Steel & Tin .....	64
Aluminum.....	65
Other .....	66
Elastomers.....	67
Paperboard .....	68

### PRODUCTS

General .....	70
Plastic Caps & Closures .....	74
Threaded .....	78
Standard .....	80
Markets.....	82
Producers.....	85

Pressurized .....	85
Dispensing.....	88
Pump, Trigger & Spray Dispensers.....	91
Other Dispensing Closures .....	94
Producers .....	97
Unthreaded.....	97
Lids.....	99
Aerosol Caps & Closures .....	102
Synthetic Corks .....	105
Child-Resistant.....	109
Products.....	111
Producers .....	114
Metal Caps & Closures .....	114
Screw & Lug.....	118
Vacuum.....	120
Nonvacuum .....	123
Crowns .....	125
Roll-Ons .....	127
Products.....	129
Producers .....	130
Other .....	130
Other Caps & Closures.....	132
Rubber.....	134
Cork.....	136
Paperboard .....	139

### MARKETS

General .....	142
Beverages .....	145
Beverage Outlook.....	146
Cap & Closure Demand.....	148
Water .....	150
Carbonated Soft Drinks .....	153
Wine & Spirits.....	155
Fruit Beverages .....	158
Milk.....	159
Beer .....	162
Other.....	164
Pharmaceuticals.....	166
Pharmaceutical Industry Outlook.....	166
Cap & Closure Demand .....	169
Food .....	172
Food & Food Container Outlook.....	173
Cap & Closure Demand .....	175
Sauces & Condiments .....	178
Dairy Products.....	182

Other.....	184
Cosmetics & Toiletries.....	188
Cosmetic & Toiletry Industry Outlook ....	189
Cap & Closure Demand .....	192
Products.....	194
Producers .....	196
Household Cleaning Products .....	197
Household Cleaning Chemicals Outlook..	197
Cap & Closure Demand .....	199
Automotive Chemicals.....	202
Automotive Chemical Industry Outlook..	203
Cap & Closure Demand .....	205
Other Markets.....	208

### INDUSTRY STRUCTURE

General .....	211
Industry Composition .....	212
Market Share .....	215
Acquisitions & Divestitures.....	222
Marketing .....	227
Distribution .....	228
Manufacturing & Development .....	230
Integration Strategies.....	231
Cooperative Agreements.....	232

### COMPANY PROFILES

Alcoa Incorporated.....	235
Amcor Limited.....	236
AptarGroup Incorporated.....	237
Ball Corporation.....	241
BERICAP Holding .....	242
Berry Plastics .....	245
CLARCOR Incorporated .....	249
Cobra Plastics.....	250
ContinentalAFA Dispensing .....	251
Crown Holdings.....	253
Daetwyler Holding.....	255
Dayton Systems Group .....	256
Drug Plastics and Glass .....	257
Erie Plastics .....	259
Global Closure Systems.....	260
Huhtamaki Oyj.....	262

(continued on next page)

## Table of Contents

(continued from previous page)

IPN Europe BV.....	263
Jarden Corporation.....	264
MeadWestvaco Corporation.....	266
Neocork Technologies.....	269
Nomacor LLC.....	270
Owens-Illinois Group.....	272
Paradigm Packaging.....	272
Phoenix Closures.....	273
Polytop Corporation.....	275
Portola Packaging.....	276
Rank Group.....	278
Rexam plc.....	282
Rio Tinto Group.....	287
Saint-Gobain.....	290
Silgan Holdings.....	292
Solo Cup.....	294
Stull Technologies.....	296
Supreme Corq.....	297
Tecnocap SpA.....	299
Tetra Laval International.....	301
Torres & Towers.....	302
TriMas Corporation.....	304
West Pharmaceutical Services.....	306

## List of Tables/Charts

### EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

### MARKET ENVIRONMENT

1 Macroeconomic Indicators.....	10
2 Population & Households.....	13
3 Personal Consumption Expenditures.....	15
4 Manufacturers' Shipments.....	18
5 Packaging Supply & Demand.....	21
6 Container Demand by Type.....	26
7 Container Demand by Market & Material.....	28
8 Plastic Container Demand by Type & Market.....	30
9 Metal Container Demand by Type & Market.....	32
10 Glass Container Demand	

by Type & Market.....	35
11 Paperboard Container Demand by Type & Market.....	36
12 Cap & Closure Market, 1997-2007.....	39
Cht Cap & Closure Market, 1997-2007.....	39
13 Cap & Closure Pricing by Material.....	41
14 Foreign Trade in Caps & Closures.....	50
Cht Cap & Closure Imports & Exports by Country, 2007.....	51

### RAW MATERIALS

1 Raw Material Use in Caps & Closures....	53
Cht Raw Material Use in Caps & Closures....	54
2 Plastic Use in Caps & Closures.....	56
3 Metal Use in Caps & Closures.....	63
4 Other Material Use in Caps & Closures..	67

### PRODUCTS

1 Cap & Closure Demand by Material.....	73
Cht Cap & Closure Demand by Material.....	73
2 Plastic Cap & Closure Supply & Demand	77
Cht Plastic Cap & Closure Demand by Type, 2007.....	78
3 Threaded Plastic Cap & Closure Demand by Type.....	80
4 Standard Threaded Plastic Cap & Closure Demand by Market.....	82
5 Pressurized Threaded Plastic Cap & Closure Demand.....	88
6 Plastic Dispensing Cap & Closure Demand by Type & Market.....	91
7 Unthreaded Plastic Cap & Closure Demand by Type.....	99
8 Plastic Lid Demand by Market.....	102
9 Aerosol Cap & Closure Demand by Type & Market.....	105
10 Synthetic Cork Demand.....	109
11 Plastic Child-Resistant Cap & Closure Demand by Type.....	111
12 Metal Cap & Closure Supply & Demand.....	117
Cht Metal Cap & Closure Demand by Type, 2007.....	118
13 Metal Screw & Lug Cap & Closure Demand by Type & Market.....	120
14 Vacuum Screw & Lug Cap & Closure Demand.....	123
15 Nonvacuum Screw & Lug Cap & Closure Demand.....	124
16 Metal Crown Demand.....	127

17 Metal Roll-On Closure Demand.....	129
18 Other Metal Cap & Closure Demand....	132
19 Other Cap & Closure Supply & Demand.....	133
20 Rubber Stopper Demand.....	136
21 Cork Closure Demand.....	139
22 Paperboard Cap & Closure Demand.....	141

### MARKETS

1 Cap & Closure Demand by Market.....	144
Cht Cap & Closure Demand by Market, 2007.....	145
2 Beverage Indicators.....	148
3 Beverage Cap & Closure Demand by Market & Material.....	150
4 Bottled Water Cap & Closure Market...	152
5 Carbonated Soft Drink Cap & Closure Market.....	155
6 Wine & Spirits Cap & Closure Market..	157
7 Fruit Beverage Cap & Closure Market..	159
8 Milk Cap & Closure Market.....	162
9 Beer Cap & Closure Market.....	164
10 Other Beverage Cap & Closure Markets	166
11 Pharmaceutical Supply & Demand.....	168
12 Pharmaceutical Cap & Closure Market..	172
13 Food Indicators.....	175
14 Food Cap & Closure Demand by Market & Material.....	178
15 Sauce & Condiment Cap & Closure Market.....	182
16 Dairy Product Cap & Closure Market ...	184
17 Other Food Cap & Closure Market.....	188
18 Cosmetic & Toiletry Supply & Demand	192
19 Cosmetic & Toiletry Cap & Closure Market.....	194
20 Household Cleaning Chemical Shipments.....	199
21 Household Chemical Cap & Closure Market.....	202
22 Automotive Chemical Indicators.....	205
23 Automotive Chemical Cap & Closure Market.....	208
24 Other Cap & Closure Markets.....	210

### INDUSTRY STRUCTURE

1 US Cap & Closure Sales by Company, 2007.....	214
Cht US Cap & Closure Market Share, 2007.	218
2 Selected Acquisitions & Divestitures..	225
3 Selected Cooperative Agreements.....	233

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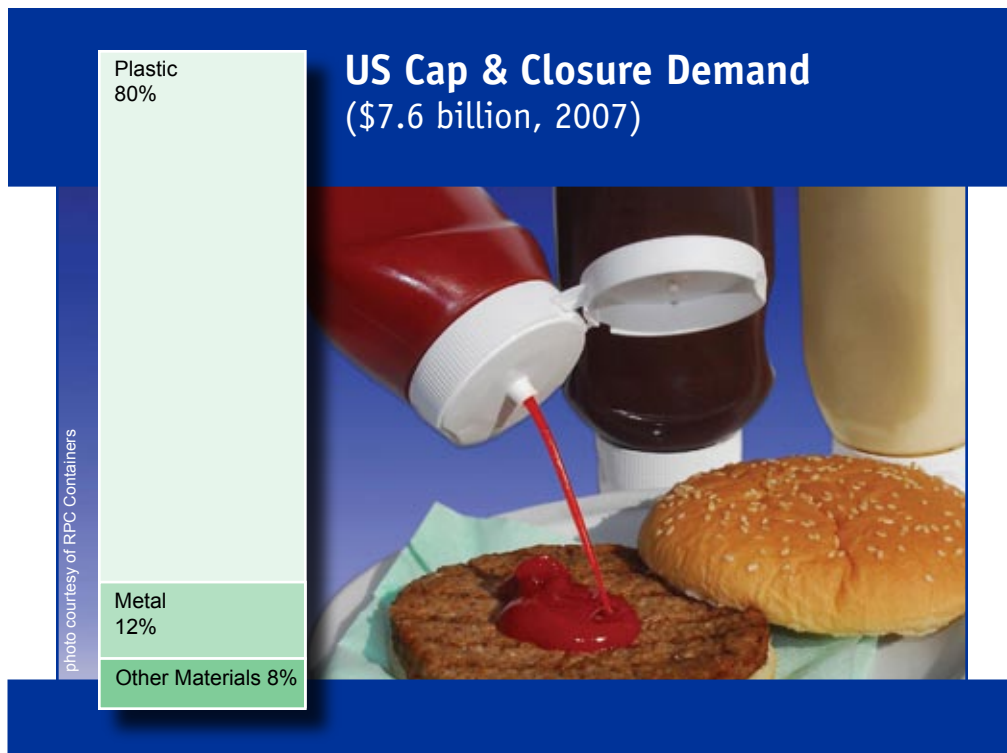
*The popularity of value-added cap and closure designs and the continuing growth of closure-intensive packaging at the expense of closureless containers will bolster gains in US demand.*

## US demand to grow 4.9% annually through 2012

US demand for caps and closures will increase 4.9 percent annually to \$9.6 billion in 2012, representing over 276 billion units. Gains will be bolstered by the popularity of value-added designs such as child-resistant closures (CRCs) and dispensing closures, with the latter offering increased convenience and controlled product release in numerous applications. Gains will be supported by the continuing growth of closure-intensive plastic packaging at the expense of closureless containers like metal cans.

## Plastic, rubber products offer best opportunities

Plastic caps and closures are by far the largest industry segment and will expand at an above-average annual rate of 5.4 percent through 2012 to \$7.9 billion, benefitting from the ongoing supplantation of metal and glass containers by their plastic counterparts in many food and beverage applications. In addition, technological improvements have enabled certain plastic closures to replace metal closures on glass food containers. Moreover, gains will be helped by healthy expansion of synthetic corks in the wine market at the expense of natural corks. Metal cap and closure demand will remain virtually flat through 2012 as a result of inroads by plastics and declining shipments of beer, the dominant application for metal crowns. Rubber stopper demand will register the



fastest gains, driven by rapid expansion in the pharmaceutical market as a result of growth in the older population segments, which tend to be the heaviest consumers of parenteral and other medications.

## Beverage, pharmaceutical markets to remain key

The key beverage market will continue to offer good prospects for caps and closures based on continued growth in the bottled water market, the increasing proliferation of single-serving drinks in plastic bottles and heightened use of higher-value dispensing closures that enhance convenience and on-the-go consumption. In the milk market, for

example, the shift from closureless cartons to plastic bottles for smaller sizes, particularly by schools and major quick-service restaurants, will boost related cap and closure demand. The pharmaceutical market will see the fastest gains, reflecting the shift to an older demographic. The mature cosmetic and toiletry market will be supported by the prevalence of value-added closures such as custom dispensing configurations, many of which employ a second, protective overcap. Other markets with better prospects include paint, based on an acceleration in maintenance and repair spending in the residential construction market, which will aid demand for paint cans and related closures.

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## Sample Text, Table & Chart

### PRODUCTS

#### Plastic Caps & Closures

Demand for plastic caps and closures will increase in 2012, the second fastest rate in the industry. Unit gains will be supported by the shift of plastic containers into numerous markets, including the water market -- as well as by the growth of many of which utilize an additional cap. Demand will advance 5.4 percent in 2012 and will be supported by further growth in plastic containers into markets once dominated by glass containers. In addition, value gains will be bolstered by growth for dispensing closures, which are generally more expensive than conventional types. Dispensing closures are particularly attractive to consumers for their convenience and ease-of-use. Value growth will also reflect healthy demand for child-resistant closures, which will benefit from an aging population that consumes increasing numbers of pharmaceuticals, many of which are available in child-resistant packaging.

Because of the diverse range of applications for plastic caps and closures, numerous product types are available. The major categories consist of pressurized and standard threaded closures (also known as screw caps), dispensing closures, unthreaded lids and overcaps, and child-resistant closures. A significant degree of overlap exists among product categories; for example, some trigger dispensers are outfitted with child-resistant features. While plastic caps and closures are valued for their compatibility with plastic containers, they also offer key advantages over metal caps and closures in competitive applications. These advantages include lower costs, lighter weight and the ability to be molded into a broad range of configurations. Plastic caps and closures can also be combined with shrink bands, breakaway bands and tear skirts to provide tamper evidence. In addition, certain plastic caps and closures

TABLE IV-12

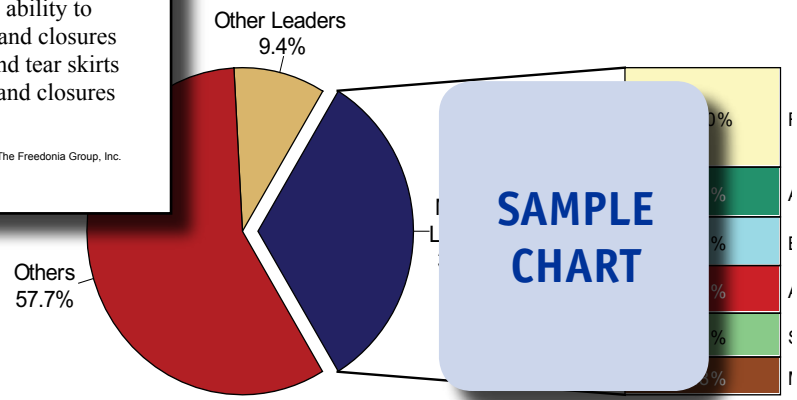
METAL CAP & CLOSURE SUPPLY & DEMAND  
(million dollars)

Item	1997	2002	2007	2012	2017
Glass Bottle & Jar Demand (bil units) closures/units					
Metal Caps & Closures (mil units) cents/unit					
Metal Cap & Closure Demand					
Screw & Lug					
Crowns					
Roll-Ons					
Other					
+ net exports					
Metal Cap & Closure Shipments					

SAMPLE TABLE

CHART VI-1

CAP & CLOSURE MARKET SHARE, 2007  
(\$7.6 billion)



SAMPLE CHART

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### ContinentalAFA Dispensing Company

27 Guenther Boulevard  
 St. Peters, MO 63376  
 636-397-1600  
<http://www.continentalafa.com>

Annual Sales  
 Employees

Key Products

ContinentalAFA is a leading manufacturer of injection molding pumps for a variety of consumer and industrial applications. The company is a private investment firm Chilmark Partners, LLC, and has several company executives and several minority partners.

The Company is active in the US cap and closure business through the production of lotion and spray dispensing pumps for use with such products as cosmetics, fragrances, lotions, pharmaceuticals and soaps. In addition, ContinentalAFA makes consumer and industrial trigger sprayers for fabric care, household cleaning, lawn and garden, pet care and other applications.

**Dispensing Pumps** -- ContinentalAFA manufactures several lotion pumps, including LPD, LLD, PRIMA AND BELLA, MAX-1, LP-700, NOVE, PLP-20, FLEXPUMP, LUXOR and LUXOR WATERSHIELD types. LPD lotion pumps are lock-down dispensers for use with viscous products, while LLD lotion pumps prevent accidental dispensing with a lock-up feature that allows the pump to be closed and locked. The Company's PRIMA AND BELLA lotions pumps are



TABLE V-3

### BEVERAGE CAP & CLOSURE DEMAND BY MARKET & MATERIAL (million dollars)

Item	1997	2002	2007	2012	2017
Beverage Containers (bil units)	19	19	19	20.9	20.9
% with closures					5.9
Beverage Caps & Closures (bil units)				1.7	1.7
cents/unit					2.5
Beverage Cap & Closure Demand					05
By Market:					
Water					80
Carbonated Soft Drinks					75
Wine & Spirits					20
Fruit Beverages					90
Milk					85
Beer					15
Other Beverages					40
By Material:					
Plastic					35
Metal					95
Cork					75



“Demand for caps and closures in the beverage market is expected to increase 5.5 percent per annum to \$3.7 billion in 2012, slowing from the pace of the 2002-2007 period as prices moderate and large-volume markets like carbonated soft drinks (CSDs) and beer experience declines or minimal growth. In unit terms, demand will grow ...”

--Section V, pg. 148

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**OTHER STUDIES**

**Plastic Containers**

This study analyzes the US plastic container industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by resin (e.g., HDPE, PET, polypropylene, polystyrene, PVC, LDPE, other); product (e.g., bottles and jars, tubs/cups/bowls, pails, food trays); and market (e.g., beverages, food products, household cleaning chemicals, cosmetics and toiletries, pharmaceuticals). The study also considers market environment factors, evaluates company market share and profiles leading competitors.

#2378 ..... 07/2008 ..... \$4600

**Pouches**

This study analyzes the US pouch industry. It presents historical demand data for the years 1997, 2002 and 2007 and forecasts for 2012 and 2017 by pouch type (e.g., four-side and three-side seal flat, pillow, stand-up, resealable, aseptic, retort, shaped, spouted); and pouch application (food and beverage packaging, nonfood packaging). The study also considers market environment factors, details industry structure, evaluates market share and profiles leading competitors.

#2367 ..... 07/2008 ..... \$4700

**Cosmetic & Toiletry Containers**

US cosmetic and toiletry container demand will reach 25.5 billion units in 2012 based on accelerating cosmetic and toiletry shipments. Plastic will be the fastest growing material while shaped aerosol cans and upscale paper cartons enjoy niche prospects. Skin care and liquid soap will be the fastest growing markets. This study analyzes the \$3.6 billion US cosmetic and toiletry container industry, with forecasts for 2012 and 2017 by material and market. It also details market share and profiles major players.

#2322 ..... 04/2008 ..... \$4600

**Pharmaceutical Packaging**

US demand for pharmaceutical packaging will grow 5.5% annually through 2012. Strong growth is forecast for value-added types, especially parenteral vials and flip-top closures, plastic dispensing bottles and closures, prefilled inhalers and syringes, parenteral stoppers, track and trace and authentication labels, and unit dose pouches. This study analyzes the \$12.2 billion US drug packaging industry, with forecasts for 2012 and 2017 by material, product and market. It also evaluates market share and profiles industry players.

#2341 ..... 05/2008 ..... \$4700

**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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