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World Caps & Closures

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

Study #2479 | March 2009 | \$5800 | 350 pages

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The US, which accounted for one-fourth of 2007 global cap and closure value demand, will see strong value gains, fueled by a continued shift in the product mix toward value-added configurations.

Global demand to expand 4.2% yearly through 2012

Global demand for caps and closures is forecast to expand 4.2 percent per year through 2012 to \$36.5 billion, representing 1.6 trillion units. Continuing urbanization and rising personal incomes in the developing world will support expansion of consumer nondurable goods markets, with closures and other packaging materials among the primary beneficiaries. However, over the 2008-2010 period, growth in all regions will be negatively impacted by the ongoing global economic malaise.

Emerging markets to post above-average gains

Above-average gains are expected in the world's emerging markets, especially those in Asia. China will lead the way, accounting for almost 30 percent of projected unit gains in global cap and closure demand through 2012. The US, which accounted for one-fourth of 2007 global cap and closure value demand, will see strong value gains, 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.

Gains will also be supported by the continuing growth of closure-intensive plastic packaging at the expense of closureless containers such as metal cans. Advances will be limited to some extent by competition from packaging formats that do not use closures and by



environmental concerns regarding plastic waste in general. Sales revenue growth will decelerate from the strong pace seen over the 2002-2007 period during a global commodity price boom, but will be aided by a continuing shift in the product mix in favor of value-added closure types which provide increased product safety, user convenience and/or shelf appeal.

Plastic caps, closures to remain dominant

Plastic caps and closures, the largest industry segment, will also register the strongest gains, benefitting from the continuing 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 further expansion of synthetic corks in the wine market at the expense of natural corks. Metal cap and closure demand will register weaker gains, posting outright declines in most developed markets. The smaller rubber and cork sector will also register subpar gains, largely due to further declines in cork demand in major wine producing nations. The rubber stopper sector will benefit from rapid expansion in the global pharmaceutical market as a result of growth in the older population segments and improving medical care in developing countries.

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Sample Text, Table & Chart

ASIA/PACIFIC

Plastics in particular will benefit from greater use of packaging at the expense of glass in the food and drink markets, as a result of greater domestic availability of high quality resin supplies. A further trend is the conversion to plastic packaging, plastic containers will continue to make inroads in markets formerly dominated by glass and metal containers, which will benefit demand for related plastic closures. This will also reflect rising demand for such value-added features as tamper-evidence, child-resistance, senior-friendliness, and high-speed printing.

Plastic packaging is increasingly favored in China due to its light weight, ease of use, durability during transportation relative to glass packaging and Western consumer image. Aluminum ROPP caps are widely used in China to package bottles of distilled spirits, wine and other drinks. Aggregate metal closure demand will register strong, albeit decelerating, gains through 2012.

China: Markets -- The beverage industry will remain by far the largest closure market in China in 2012. Beer accounted for 16.4 percent of total unit demand in 2012. Beer and closure market in 2007 (China's cap and closure market in 2007 (China's cap and closure market in 2007) as a whole). China surpassed the US as the world's largest beer market in 2002, and in 2007 produced more beer than the US. Through 2012, beer caps will continue to register average gains. Metal crowns will be used to package glass containers. Glass continues to dominate the beer packaging mix, although faster growth is expected for draft, canned and plastic bottle formats. Robust gains are also expected in noncarbonated drink markets, including wine, distilled and mineral waters, juices and various "New Age" and natural (e.g., vegetable protein and nut milk) beverages. CSD and bottled water demand growth will lag the overall market, but remain strong by world standards.

TABLE VI-5

CHINA -- CAP & CLOSURE SHIPMENTS & SALES

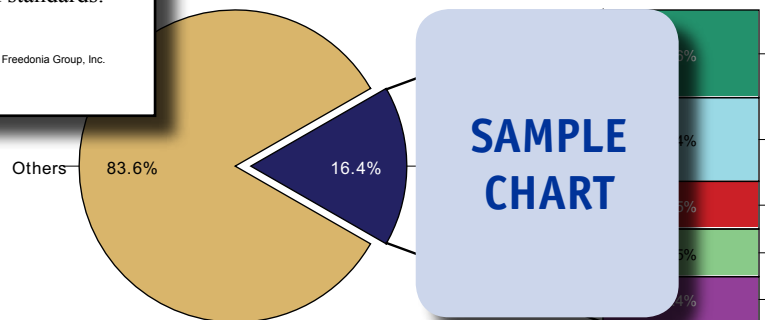
Item	1997	2002	2007	2012	2017
Population (million persons)	1,200	1,250	1,300	1,350	1,400
\$ GDP per capita	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product (bil 2006\$)	100	150	200	250	300
% food & bev	10	10	10	10	10
Food & Bev Value-Added (bil 2006\$)	10	15	20	25	30
\$ C&C/capita	0.1	0.1	0.1	0.1	0.1
\$ C&C/000\$ GDP	0.01	0.01	0.01	0.01	0.01
\$ C&C/000\$ food & bev	0.01	0.01	0.01	0.01	0.01
Cap & Closure Sales (mil \$)	100	150	200	250	300
net exports	0	0	0	0	0
Cap & Closure Shipments (mil \$)	100	150	200	250	300

SAMPLE TABLE

SAMPLE TEXT

CHART VIII-1

WORLD CAP & CLOSURE MARKET SHARE, 2007 (\$29.7 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-6
CHINA -- CAP & CLOSURE SALES BY MATERIAL & MARKET
 (million units)

Item	1997	2002	2007	2012	2017
Cap & Closure Sales (mil \$) cents/unit					
Cap & Closure Sales By Material:					
Plastic					
Metal					
Rubber & Cork					
By Market:					
Beverages:					
Beer					
Carbonated Soft Drinks					
Bottled Water					
Other Beverages					
Food					
Pharmaceuticals					
Other					



COMPANY PROFILES

Grup Vemsa 1857 SL
 Viladomat 321, 2
 08029 Barcelona
 Spain
 34-93-363-2500
<http://www.vemsa.com>

Annual Sales:
 Employment:

Key Products: metal and plastic caps and closures

Grup Vemsa manufactures metal caps, bulb sockets for plastic bottle tops. The Company does business through joint ventures: Plastivit SA, Covit SA, Sofiplast SA, Vitri Electro Metalurgica SA and VV International SA.

The Company participates in the world cap and closure industry through the Plastivit, Covit and Sofiplast subsidiaries. Via these companies, Grup Vemsa manufactures security closures, aerosol overcaps, metal and plastic caps and closures, and dispensing systems.

Grup Vemsa's Plastivit subsidiary (Spain) does business through three divisions: Security Closures, Aerosol Caps and Aluminum Caps. The Security Closures division makes tamper-evident closures that are sold under the VITAL and ALFA brand names. VITAL closures feature protected pouring features, security valves and aluminum covers. The division's ALFA closure line comprises the 1 and 2 series, which includes 31.5-millimeter (mm) products that can incorporate security

SAMPLE PROFILE

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"China's food industry will also offer strong gains for the cap and closure market. In addition to rapid development of the packaged food sector in general, closure demand will benefit from the fact that some of the fastest growing processed food segments in China are intensive users of caps and closures. Examples include fats and oils, and, to a somewhat lesser extent, baby foods, sauces and condiments."

--Section VI, pg. 182

OTHER STUDIES

World Pharmaceutical Packaging

This study analyzes the global drug packaging industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by raw material, product (e.g., bottles and jars, blister packaging, pouches and strip packs, prefillable syringes, medication tubes, prefillable inhalers, parenteral vials and ampuls, IV containers, caps and closures), world region and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles major players

#2504 05/2009..... \$6100

Beverage Containers in China

This study analyzes the beverage container industry in China. It presents historical demand data for the years 1997, 2002 and 2007 and forecasts for 2012 and 2017 by beverage container market (e.g., milk, carbonated soft drinks, water, fruit beverages, teas, beer, distilled spirits, rice wine, wine) and material (e.g., plastic, glass, paperboard, metal, ceramic). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2484 04/2009..... \$5200

Cups & Lids

US demand for cups and lids will advance 4.3% annually through 2012. Drinking cups will remain the dominant cup type while packaging cups will grow the fastest. Growth in lids will outpace cups as more drinking cups use lids, especially higher-value specialty lids. Foodservice will remain the dominant market while food packaging grows more rapidly. This study analyzes the \$6.3 billion US cup and lid industry, with forecasts for 2012 and 2017 by product and market. It also details market share and profiles major players.

#2429 11/2008..... \$4600

Beverage Containers

US demand for beverage containers will grow 2.4% annually through 2012. Gains will be driven a healthy outlook for single serving containers and enhanced or functional beverages. Plastic containers will remain the largest and fastest growing segment. Bottled water will continue to post above-average market gains. This study analyzes the \$22.5 billion US beverage container industry, with forecasts for 2012 and 2017 by type and market. It also evaluates company market share and profiles major players.

#2423 11/2008..... \$4700

Caps & Closures

US demand for caps and closures will rise 4.9% annually through 2012. Gains will be bolstered by the popularity of value-added designs such as child-resistant and dispensing closures. Gains will be supported by the continuing growth of closure-intensive plastic packaging at the expense of closureless containers like metal cans. This study analyzes the \$7.6 billion US cap and closure industry, with forecasts for 2012 and 2017 by material, product and market. It also evaluates market share and profiles industry competitors.

#2354 06/2008..... \$4700

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