

[CLICK TO VIEW](#)

[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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Tube & Stick Packaging

US Industry Study with Forecasts for **2014 & 2019**

Study #2631 | May 2010 | \$4800 | 202 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Outlook	5
Demographic & Household Trends ...	8
Consumer Income & Spending	11
Manufacturing Outlook.....	13
Building Construction	
Expenditures	16
Retail Sales Outlook	19
Packaging Industry Outlook	21
Pricing Trends	25
Environmental & Regulatory	
Considerations.....	28
International Activity	
& Foreign Trade	31

PRODUCTS

Types	34
Squeeze Tubes	37
Laminate Tubes	40
Extruded Plastic Tubes	43
Extruded Aluminum Tubes	47
Other Squeeze Tubes	49
Twist Tubes	51
Cartridges.....	54
Stick Packs	58
Food Applications	61
Nonfood Applications	63
Other Tubes & Sticks	64
Materials	67
Plastic	69
Squeeze Tubes	71
Twist Tubes	72
Cartridges	73
Other	73
Aluminum	74
Paper.....	76

MARKETS

General	79
Cosmetics & Toiletries.....	82
Cosmetic & Toiletry	
Industry Outlook	82
Tube & Stick Packaging Demand.	84
Toothpaste.....	87
Lip Products.....	89
Hair Care	92
Deodorant.....	94
Skin Care	95
Eye & Face Cosmetics	98
Other	100
Pharmaceuticals.....	102
Pharmaceutical	
Industry Outlook	103
Tube & Stick Packaging	
Demand	104
Adhesives & Sealants.....	108
Adhesive & Sealant	
Industry Outlook	109
Tube & Stick Packaging	
Demand	111
Food	114
Food Industry Outlook.....	114
Tube & Stick Packaging	
Demand	117
Other Markets.....	121

INDUSTRY STRUCTURE

General	124
Market Share	127
Alcan Packaging Beauty.....	128
Sonoco Products.....	129
Rexam	129
Essel Propack.....	129
Berry Plastics.....	130
Jim Pattison Group	130
Plastek Group	131
CCL Industries.....	131
Betts Group	132
Acquisitions & Divestitures	132
Marketing & Distribution	135

Competitive Strategies.....	137
Cooperative Agreements.....	138

COMPANY PROFILES

Amcor Limited	141
Armbrust Paper Tubes	144
Bemis Company	145
Berry Plastics	147
Betts Group.....	149
Catalent Pharma Solutions.....	150
CCL Industries	151
CPP Global	153
Crystal-Vision Packaging Systems	154
Deutsche Post	155
Essel Propack	157
Fischbach KG.....	159
Flex Products.....	160
Graham Packaging	161
HandsFree Marketing	163
HCT Europe Limited	164
Hsing Chung Plastics Shanghai...	166
IntraPac Group	168
Iridium Industries	170
JSN Cosmetic Packaging	171
Pattison (Jim) Group	172
Plastek Group	174
Plastube North America.....	176
Printpack Incorporated	177
Rexam plc.....	178
Rio Tinto Group	181
Silgan Holdings	183
Sinclair & Rush.....	185
Sonnen & Company	187
Sonoco Products	188
Tectubes Sweden.....	190
T.H.E.M.	192
Tstix Pty Limited.....	193
Tulox Plastics	194
Unette Corporation.....	195
Unicep Packaging.....	197
World Wide Packaging	199
Additional Companies in	
Tube & Stick Packaging	201

List of Tables

EXECUTIVE SUMMARY

- 1 Summary Table3

MARKET ENVIRONMENT

- 1 Macroeconomic Indicators8
- 2 Population & Households 11
- 3 Personal Consumption Expenditures..... 13
- 4 Manufacturers' Shipments..... 16
- 5 Building Construction Expenditures..... 19
- 6 Retail Sales..... 21
- 7 Packaging Supply & Demand.. 25
- 8 Selected Tube & Stick Packaging Prices..... 28

PRODUCTS

- 1 Tube & Stick Packaging Demand by Type 36
- 2 Squeeze Tube Demand by Type & Market..... 39
- 3 Laminate Tube Demand by Market 43
- 4 Extruded Plastic Tube Demand by Market 46
- 5 Extruded Aluminum Tube Demand by Market 49
- 6 Other Squeeze Tube Demand by Market 51
- 7 Twist Tube Demand by Market 54
- 8 Cartridge Demand by Material & Market 58
- 9 Stick Pack Demand by Market. 60
- 10 Other Tube & Stick Packaging Demand by Market 66
- 11 Tube & Stick Packaging Demand by Material 68
- 12 Plastic Tube & Stick Packaging Demand by Type 70

- 13 Aluminum Tube & Stick Packaging Demand by Type .76
- 14 Paper Tube & Stick Packaging Demand by Type 78

MARKETS

- 1 Tube & Stick Packaging Demand by Market 81
- 2 Cosmetic & Toiletry Shipments 84
- 3 Cosmetic & Toiletry Market for Tube & Stick Packaging by Application.... 86
- 4 Toothpaste Market for Tube Packaging 89
- 5 Lip Product Market for Tube & Stick Packaging 92
- 6 Hair Care Market for Tube & Stick Packaging 94
- 7 Deodorant Market for Tube & Stick Packaging 95
- 8 Skin Care Market for Tube & Stick Packaging 98
- 9 Eye & Face Cosmetics Market for Tube & Stick Packaging 100
- 10 Other Cosmetic & Toiletry Markets for Tube & Stick Packaging 102
- 11 Pharmaceutical Shipments... 104
- 12 Pharmaceutical Market for Tube & Stick Packaging..... 108
- 13 Adhesive & Sealant Shipments 111
- 14 Adhesive & Sealant Market for Tube & Stick Packaging 114
- 15 Food Shipments..... 117
- 16 Food Market for Tube & Stick Packaging 121
- 17 Other Markets for Tube & Stick Packaging 123

INDUSTRY STRUCTURE

- 1 US Tube & Stick Packaging Sales by Company, 2009 ... 126
- 2 Selected Acquisitions & Divestitures 134
- 3 Selected Cooperative Agreements 139

List of Charts

PRODUCTS

- 1 Tube & Stick Packaging Demand by Type, 2009 37
- 2 Squeeze Tube Demand by Type, 2009 40
- 3 Tube & Stick Packaging Demand by Material, 2009 .. 68
- 4 Plastic Tube & Stick Packaging Demand by Type, 2009 71

MARKETS

- 1 Tube & Stick Packaging Demand by Market, 2009 81
- 2 Cosmetic & Toiletry Market for Tube & Stick Packaging by Application, 2009..... 87

INDUSTRY STRUCTURE

- 1 US Tube & Stick Packaging Market Share, 2009 128

Advances in demand will be driven by increased production of cosmetics, toiletries and pharmaceuticals, along with aesthetic and barrier performance improvement in squeeze tubes.

US demand to rise 5.1% annually through 2014

Demand for tube and stick packaging in the US is forecast to expand 5.1 percent per year to \$1.8 billion in 2014. Advances will be driven by increased production of cosmetics, toiletries and pharmaceuticals, along with aesthetic and barrier performance improvement in squeeze tubes. Additionally, gains will be boosted by a recovery in the US economy, which will result in improved outlooks for construction and manufacturing activity as well as retail sales. A recovery in the construction sector, especially residential construction, will bode well for cartridges used to package caulks and sealants, which are widely used in new construction and in maintenance and repair applications.

Stick packs to be fastest growing from small base

The fastest gains are expected for stick packs, with demand projected to climb 11.8 percent annually from a small base through 2014. Gains will be propelled by advantages of product differentiation, portability and material savings compared to conventional single-portion pouch configurations. Moreover, the differentiation attributes of stick packs will be advantageous in introductions of product line extensions and in refreshing or repositioning mature products.

Squeeze tubes are by far the largest tube and stick packaging product type,



accounting for 61 percent of value demand in 2009. Through 2014, squeeze tube demand is expected to climb 4.8 percent annually, slightly lagging the overall industry based on the maturity of aluminum tubes. Nonetheless, gains will be supported by production growth in the large cosmetic, toiletry and pharmaceutical markets. Additionally, prospects will be helped by improved barrier properties in extruded plastic tubes, and greater use of laminate tubes in applications beyond toothpaste. Good opportunities are also anticipated for unit-of-use tubes, which offer accurate dosing of pharmaceuticals and serve as sample or promotional packaging for cosmetics and toiletries.

Smaller markets to outpace dominant segment

Cosmetics and toiletries are the largest market for tube and stick packaging, accounting for 56 percent of demand in 2009. Advances in the cosmetic and toiletry market will be slightly below average, reflecting saturation in some applications and competition from alternative packaging media. Smaller markets such as adhesives and sealants, and food are expected to post faster gains, aided by an upswing in construction activity and the emergence of new uses, respectively. Growth in the pharmaceutical market will be in line with the overall tube and stick packaging average.

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Sample Text, Table & Chart

PRODUCTS

Extruded Aluminum Tubes -- Demand for extruded tubes is expected to grow at a rate of 1.5 percent per year to over \$1.4 billion in 2014. Extruded aluminum tubes will post a marginal gain to units of 1.5 million units, but will trail the squeeze tube on future growth. Extruded plastic tubes and extruded plastic tubes with thin walls are the most cost imported tubes.

SAMPLE TEXT

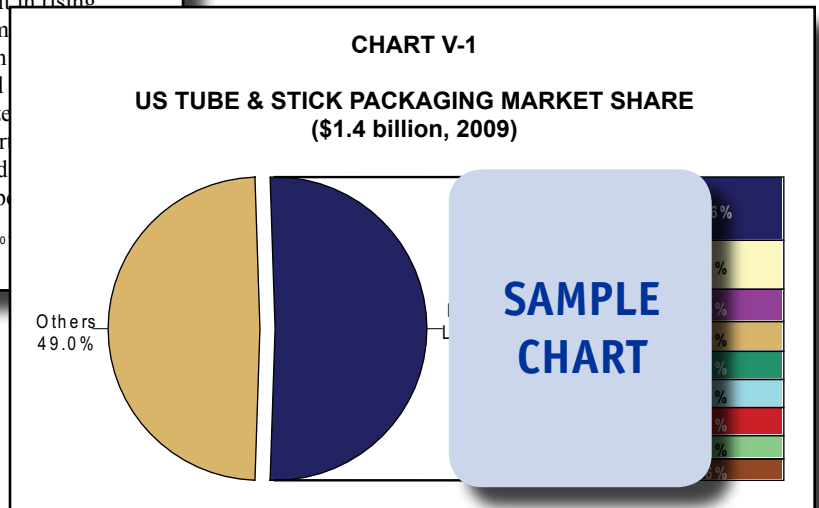
Extruded aluminum tubes are the original squeeze tube and have been largely supplanted by laminate or extruded plastic tubes in the majority of applications. Drawbacks of aluminum tubes include their higher price and that they do not retain their shape after repeated use. In contrast, aluminum tubes are often preferred in markets like adhesives and paints because of their ability to be folded down as the contents are used. Despite inroads from plastic tubes, aluminum tubes are still widely used with pharmaceuticals, adhesives and sealants, artists' paints and certain oxygen-sensitive hair and skin products as they offer slightly better moisture, light and chemical resistance properties than laminate tubes. In addition, aluminum tubes have a reduced tendency to such back air than do plastic tubes, which prevents contents such as adhesives and paints from drying out.

Adhesives and sealants, and pharmaceuticals are the leading markets for extruded aluminum tubes. Growth in adhesive and sealant applications is expected to outpace the aluminum tube average, aided by a recovery in construction expenditures, which will result in rising demand for adhesives and sealants. Continued demand is anticipated for small craft and hobby projects. A rebound in the manufacturing sector will also benefit demand for adhesives used in assembly. Extruded aluminum tubes are the leading squeeze tube for adhesives and sealants based on their high barrier properties and chemical resistance. However, aluminum tubes are expected to lose share to laminate tubes, which offer nearly the barrier properties of aluminum tubes.

TABLE III-5
EXTRUDED ALUMINUM TUBE DEMAND BY MARKET
 (million dollars)

Item	1999	2004	2009	2014	2019
Squeeze Tube Demand					70
% aluminum					1.7
Extruded Aluminum Tube Demand					46
Adhesives & Sealants					57
Pharmaceuticals					39
Cosmetics & Toiletries					35
Other					15
cents/unit					1.5
Extruded Aluminum Tubes (mil units)					95

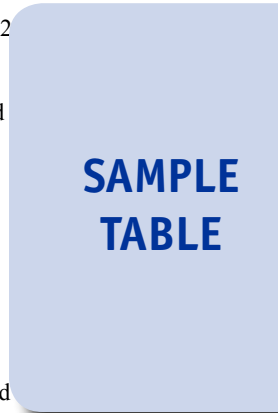
SAMPLE TABLE



Sample Profile, Table & Forecast

TABLE IV-3
**COSMETIC & TOILETRY MARKET FOR
 TUBE & STICK PACKAGING BY APPLICATION**
 (million dollars)

Item	1999	2004	2009	2014	2019
Cosmetic & Toiletry Shipments \$ tubes & sticks/000\$ C&T	2				0
Cosmetic/Toiletry Tube/Stick Demand					5
Toothpaste					6
Lip Products					9
Hair Care					1
Deodorant					7
Skin Care					1
Eye & Face Cosmetics					0
Other					1
% cosmetic & toiletry					2
Total Tube & Stick Packaging Demand					0



COMPANY PROFILES

Unicep Packaging Incorporated
 1702 Industrial Drive
 Sandpoint, ID 83864
 208-265-9696
 http://www.unicep.com

Annual Sales: (b) (3)
 Employment: (b) (3)

Key Products/ services: (b) (3) tube filling

Unicep is a leading manufacturer in the contract packaging of cosmetic and personal care products. The company's contract packaging business serves a wide range of markets, including pharmaceutical, veterinary, household and industrial markets.

The Company competes in the US tube and stick packaging industry via the production of nonsterile, single-use contract packaging for gels, liquids, lotions and emulsions used in the medical device, over-the-counter drug, personal care and cosmetics, and veterinary industries. Among Unicep's production capabilities are blow-fill-seal and thermoforming manufacturing methods.

Blow-fill-seal products from Unicep include MICRODOSE, TWIST-TIP and high-speed tubes. MICRODOSE tubes are unit-dose types that combine tube packaging with syringe-like dispensing nozzles. These tubes are available in .1- to .3-ounce sizes and can be used to package in-vitro diagnostic products, tooth whitening gels and conditioners, topical anesthetic, pharmaceuticals, shampoo and conditioner, topical medications, water testing and pool maintenance chemicals, lubricants and other products. Furthermore, MICRODOSE

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"Demand for laminate tubes for toothpaste is projected to rise 4.7 percent annually to nearly \$245 million in 2014. Gains will be driven by consumer interest in products that provide improved whitening and breath freshening. Though laminate tubes for toothpaste generally feature a three-layer structure of aluminum foil sandwiched between layers of polyethylene film, recent developments include all-plastic tubes, which can be opaque or clear. In 2008, Colgate-Palmolive introduced a ..."
 --Section IV, pg. 88

OTHER STUDIES

Foodservice Packaging: Bulk & Portion Control

US foodservice packaging demand will climb 2.5% annually through 2014. Flexible packaging will outpace rigid based on cost, convenience and performance advantages. Restaurants other than quick service types will post the fastest growth within the dominant eating and drinking places market. This study analyzes the \$7 billion US foodservice packaging industry, with forecasts for 2014 and 2019 by product, application and end user. It also evaluates company market share and profiles industry players.

#2642 May 2010 \$4800

World Food Containers

Global demand for food containers is forecast to increase 3.9% annually through 2013. Bags and pouches will remain the largest product type while plastic containers will grow the fastest. Some of the best gains are expected in the BRIC countries of Brazil, Russia, India and China. This study analyzes the \$103 billion world food container industry, with forecasts for 2013 and 2018 by product, market, world region and for 22 countries. It also evaluates company market share and profiles industry players.

#2601 February 2010 \$5800

Frozen Food Packaging

US demand for frozen food packaging will climb 3.7% yearly through 2013. Gains will be driven by the popularity of convenience-type foods, the prevalence of microwave ovens, and technological advances in packaging. Frozen food specialties and meat, poultry and seafood will be the fastest growing applications. This study analyzes the \$5.7 billion US frozen food packaging industry, with forecasts for 2013 and 2018 by application and product. It also evaluates company market share and profiles industry players.

#2594 January 2010 \$4700

Microwave Packaging

US microwave packaging demand will climb 7% annually through 2013, driven in part by demand for more convenient meals coupled with the prevalence of microwave ovens. Frozen foods will remain the top use while fresh prepared foods will lead gains. Foodservice containers and tubs, cups and bowls will be the fastest growing types. This study analyzes the \$1.7 billion US microwave packaging industry, with forecasts for 2013 and 2018 by application and product. It also evaluates company market share and profiles industry players.

#2572 December 2009 \$4700

Converted Flexible Packaging

US converted flexible packaging demand will grow 3.4% yearly through 2013, supported by cost, performance and source-reduction advantages over most rigid packaging. Pouches will lead gains, including stand-up types as well as relatively newer products such as flat-bottomed, side-gusseted and stick types. This study analyzes the \$15.2 billion US converted flexible packaging industry, with forecasts for 2013 and 2018 by material, product and market. It also evaluates market share and profiles industry players.

#2558 October 2009 \$4900

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