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Caps & Closures

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

Study #2688 | October 2010 | \$4900 | 310 pages

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INDUSTRY STRUCTURE

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Advances will be aided by greater use of more expensive dispensing closures and child-resistant closures (CRCs), as well as by the continued popularity of single-serving containers.

US demand to grow 4% annually through 2014

US demand for caps and closures is forecast to increase 4.0 percent per year to \$9.5 billion in 2014, reaching 275 billion units. Advances will be aided by greater use of more expensive dispensing closures and child-resistant closures (CRCs). Unit gains will be supported by the continued popularity of single-serving containers, especially in the beverage market, and further inroads by plastic containers in applications formerly dominated by glass and metal containers. However, unit advances will decelerate from the pace of the 1999-2009 period based on the maturity of several large beverage applications and environmental concerns regarding bottled water. Competition from closureless packaging formats, such as aluminum beverage cans, most stand-up pouches, and blister packs, will moderate gains, as will the use of flexible foil, paper and film lidding rather than rigid lids in many applications.

Plastic caps, closures to remain dominant, lead gains

Plastic caps and closures, which comprised 79 percent of unit demand in 2009, will post above-average unit and value advances, reflecting continued inroads by plastic containers into numerous markets. Plastic cap and closure demand is forecast to climb 4.5 percent annually to \$7.7 billion in 2014, supported by the long-term shift in the

US Cap & Closure Demand, 2009 (\$7.8 billion)



Plastic
79%

Metal
11%

Other
10%

photo: O-I

consumer packaging mix away from glass and metal containers to plastic alternatives, as plastic containers tend to employ plastic closures. Moreover, the compatibility of plastic caps with glass containers and the use of such caps on gabletop cartons will boost growth. However, gains will decelerate from the 1999-2009 performance, reflecting the already significant penetration of plastic containers in most markets as most large-scale conversions have already taken place.

Metal cap and closure demand is expected to decline moderately through 2014 as a result of further inroads by plastic containers and closures and a sluggish outlook for production of beer,

the dominant application for metal crowns. Among major cap and closure materials, elastomer and rubber stoppers will experience the fastest growth through 2014 based on increasing preferences for stoppers made from higher value-added elastomeric and synthetic rubber materials. Gains will also be driven by the continuing commercialization of injectable biotechnology-based drugs and the increasing availability of parenteral medication in prefilled syringes. Demand for natural cork closures will be adversely affected by inroads from synthetic corks and aluminum roll-on closures in the wine industry.

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Sample Text, Table & Chart

PRODUCTS

Metal Caps & Closures

US demand for metal caps and closures is expected to remain modest through 2014, losing further ground to plastic. A sluggish outlook will be based on the ongoing supplanting of metal containers -- which generally employ metal caps and closures -- with plastic alternatives and compatible plastic closures. In addition, plastic closures can be used with glass bottles and jars, further eroding demand for metal closure products. Moreover, marginal growth for beverage bottles -- a principal application for metal closures -- will be a faint prospect for metal closures. However, the overall outlook is well-above average growth (albeit from a smaller base) in all roll-on closures for wine packaging. Additionally, increasing aluminum bottles in certain beverage applications will benefit for the metal caps and closures -- typically crowns and roll-ons -- used with these containers. In value terms, metal cap and closure demand will decline as a result of leveling off or slight declines in volume seen in the 2004-2009 period.

**SAMPLE
TEXT**

With its long market share, metal caps and closures have many advantages, including strength, the ability to create a tight seal, superior barrier properties and good appearance (including image in many applications and amenability to high-quality metal lithographic printing). However, improvements in plastic containers and plastic closures have allowed plastic closures to penetrate many hot-fill food and beverage markets once exclusively served by metal closures. In the case of metal vacuum caps, the expensive, energy-intensive steam process is typically needed to seal a plastisol gasket inside the cap. In order to cut costs and eliminate the packaging process, many producers have opted for hot-fill methods that use less costly plastic caps that do not need steam.

Since metal caps and closures are primarily used with glass bottles and jars, growth prospects are heavily influenced by those factors.

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TABLE IV-2

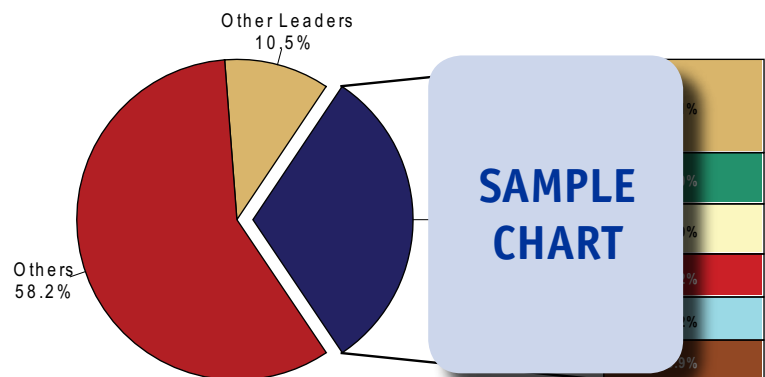
PLASTIC CAP & CLOSURE SUPPLY & DEMAND
(million dollars)

Item	1999	2004	2009	2014	2019
Total Caps & Closures (bil units)	100	100	100	100	100
% plastic	10	10	10	10	10
Plastic Caps & Closures (bil units)	10	10	10	10	10
cents/unit	9	9	9	9	9
Plastic Cap & Closure Demand	5	5	5	5	5
Threaded	0	0	0	0	0
Dispensing	5	5	5	5	5
Unthreaded	0	0	0	0	0
Child-Resistant	0	0	0	0	0
+ net exports	0	0	0	0	0
Plastic Cap & Closure Shipments	5	5	5	5	5

**SAMPLE
TABLE**

CHART VI-1

US CAP & CLOSURE MARKET SHARE, 2009
(\$7.8 billion)

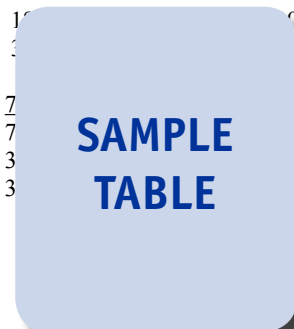


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE V-8
MILK CAP & CLOSURE MARKET
(million units)

Item	1999	2004	2009	2014	2019
Milk Container Demand (bil units)	17	17	17	17	17
% with closures	2	2	2	2	2
Milk Closure Demand	7	7	7	7	7
Plastic:	7	7	7	7	7
Standard (Threaded)	3	3	3	3	3
Lids	3	3	3	3	3
Dispensing					
Metal					
cents/unit					
Milk Closure Demand (mil \$)	95	150	215	250	305



COMPANY PROFILES

Drug Plastics and Glass Company Incorporated

1 Bottle Drive
 Boyertown, PA
 610-367-5000
<http://www.drugplastics.com>

Annual Sales:
 Employment:

Key Products: continuous thread and dispensing closures



Drug Plastics and Glass (DP&G) is a privately held manufacturer of plastic bottles, jars and closures. The Company markets its products to the pharmaceutical, personal care, cosmetic, chemical and food industries.

The Company is involved in the US cap and closure industry through the production of senior-friendly child-resistant, continuous thread and dispensing closures. These items are manufactured through DP&G's makes these products through its Drug Plastics Closures subsidiary (Boyertown, Pennsylvania).

Senior-friendly child-resistant closures produced by Drug Plastics Closures, which are sold under the SECURX brand name, are made from polypropylene in 24- to 63-millimeter (mm) sizes. SECURX closures feature a push-and-turn design and are available with ribbed skirts and debossed text or pictorial tops. These closures are suitable for use in automotive chemical, household chemical, lawn and garden product, personal care, pharmaceutical, pool chemical, and vitamin packaging applications. Continuous thread closures from the company are made with smooth or matte tops and ribbed or smooth skirts. Drug Plastics

"Demand for caps and closures in milk packaging is expected to expand 3.1 percent annually to \$250 million in 2014, with demand in unit terms climbing 2.0 percent per year to 11.2 billion units. Although demand for fluid white milk in conventional gallon and half-gallon containers will post limited growth, demand for flavored milk and single-serving containers of milk will expand significantly faster."

--Section V, pg. 165-6

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OTHER STUDIES

World Caps & Closures

World demand for caps and closures will rise 4.6% annually through 2014. Growth will be based in part by a shift toward higher-value closures such as child-resistant, tamper-evident and dispensing types. Some of the best opportunities will be found in the Asia/Pacific region, where over two-fifths of market gains will occur. This study analyzes the \$32 billion world cap and closure industry, with forecasts for 2014 and 2019 by material, market, world region and for 18 countries. It also evaluates company market share and profiles industry participants.

#2719 *January 2011* \$6100

Pharmaceutical Packaging

Demand for pharmaceutical packaging in the US is forecast to increase 5.3% annually through 2014. Gains will be driven by recently upgraded regulations and standards that will boost demand for high value-added containers and accessories. Parenteral containers and labels will be among the fastest growing types. This study analyzes the \$14.3 billion US pharmaceutical packaging industry, with forecasts for 2014 and 2019 by type and market. It also evaluates company market share and profiles industry players.

#2645 *September 2010* \$4900

Cups & Lids

US demand for cups and lids will increase 4.4% per year to 2014, driven by expanding foodservice revenues and favorable prospects for food packaging cups. Value gains will be bolstered by increasing demand for environmentally friendly cups, such as cups made from higher-value biodegradable resins or recycled content. This study analyzes the \$6.6 billion US cups and lids industry, with forecasts for 2014 and 2019 by product and market. It also evaluates company market share and profiles industry players.

#2679 *August 2010* \$4800

Plastic Containers

US plastic container demand will rise 4.3% yearly to 2014, driven by performance advantages over alternative packaging media. Bottles and jars will remain the dominant type, while pails and other containers grow the fastest. PET and HDPE will remain the most common resins while polypropylene leads gains. This study analyzes the 12.5 billion pound US plastic container industry, with forecasts for 2014 and 2019 by type and resin. It also evaluates company market share and profiles industry players.

#2672 *August 2010* \$4900

Tube & Stick Packaging

US tube and stick packaging demand will rise 5.1% annually through 2014. The fastest gains are expected for stick packs, driven by advantages of product differentiation, portability and material savings compared to conventional single-portion pouches. The dominant squeeze tube segment will slightly lag the overall industry. This study analyzes the \$1.4 billion tube and stick packaging industry, with forecasts for 2014 and 2019 by product type and market. It also evaluates company market share and profiles industry players.

#2631 *May 2010* \$4800

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