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World Caps & Closures

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

Study #2719 | January 2011 | \$6100 | 408 pages



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Advances will be stimulated in part by an ongoing shift in the product mix toward higher-value closures, such as child-resistant, tamper-evident and dispensing types.

Global demand to rise 4.6% yearly through 2014

World demand for caps and closures is projected to rise 4.6 percent per year to \$40 billion in 2014. Advances will be stimulated by growth in global manufacturing output (which will boost packaging requirements), trends toward urbanization and an ongoing shift in the product mix toward higher-value closures, such as child-resistant, tamper-evident and dispensing types. Some of the best opportunities for caps and closures will be found in the Asia/Pacific region, which will account for more than two-fifths of aggregate market value gains between 2009 and 2014.

Beverages to remain largest cap and closure market

Beverages -- beer and carbonated soft drinks in particular -- will remain the main consumers of caps and closures, but more rapid gains are expected in smaller markets such as food and pharmaceuticals. While cap and closure demand in the bottled water segment saw double-digit annual growth over the 1999-2009 period, advances will decelerate considerably, in large part due to environmental concerns in developed countries. Cap and closure demand in the food market will benefit from trends toward convenience-oriented packaged food. This will especially boost demand for plastic closures, including dispensing types. However, competition from flexible packaging, such as pouches (which are

World Cap & Closure Demand (\$39.5 billion, 2014)



Asia/Pacific
34%

North America
30%

Western Europe
23%

Other Regions
13%

photo: Plasdene Glass Pak

generally closureless), will prevent faster gains for caps and closures.

Most rapid advances to occur in developing regions

While the US is by far the world's biggest consumer of caps and closures in value terms (accounting for close to one-quarter of global demand in 2009), the most rapid advances will occur in developing regions. Growth in Asia, the Africa/Mideast region, Central and South America, and Eastern Europe will outpace the global average. Industrialization trends and improvements in living standards will fuel demand for caps and closures in these regions' generally underdeveloped end-user manufacturing

industries (e.g., food and beverage processing, pharmaceuticals, and cosmetics and toiletries). China, which is the world's largest consumer of caps and closures in volume terms, will continue to see some of the fastest growth as advances in personal income levels and consumer expenditures, combined with trends toward urbanization, boost demand for packaged consumer goods. These factors will fuel cap and closure requirements in China, as will increased exports of Chinese goods to more advanced consumer economies (creating the need for higher-quality packaging that meets international standards). India will also see rapid increases in cap and closure demand through 2014, but gains will stem from a much smaller base.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Cap & Closure Materials

In volume terms, demand for caps and closures in China is projected to grow through 2014 to 2019. This growth is driven by the country's rapid economic growth rates in the past few years. China has the greatest number of closures, having surpassed the US (though the US remains the world's largest market in value terms). Strong gains in key sectors -- such as food and beverages, pharmaceuticals, toiletries, household cleaners and automotive chemicals -- will fuel advances in cap and closure demand in China.

SAMPLE TEXT

Plastic caps and closures, which accounted for close to one-half of volume demand in 2009, will continue to see above-average growth. Demand will benefit from greater use of plastic packaging at the expense of glass bottles and jars, especially in food and beverage applications (as plastic containers typically use plastic caps and closures, while glass jars often use metal closures). In addition, rising packaging standards in China (due to higher consumer requirements in both local and export markets) will boost demand for value-added plastic caps and closures, such as those offering tamper-evidence, child-resistance, convenience and ease-of-dispensing features.

Despite losing market share to plastics, metal caps and closures will continue to represent a large share (about 46 percent through 2014) of total demand in China. This is a reflection of the country's long history in the metal cap and closure industry, which will continue to use vast quantities of metal caps on glass beer bottles. While closureless metal cans will continue to inroads in beer packaging, glass bottles will remain the most popular beer packaging format (thus supporting demand for metal closures).

192

Copyright 2010

TABLE VI-9

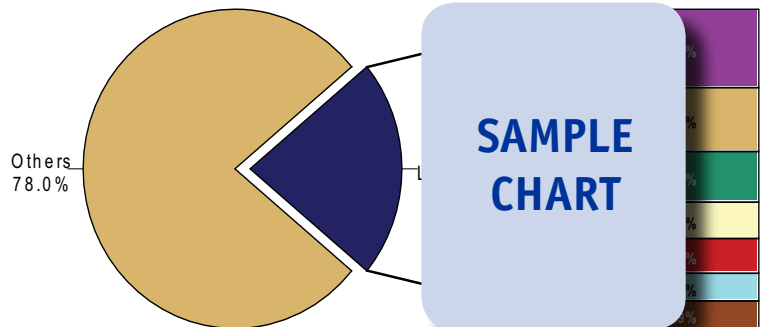
CHINA -- CAP & CLOSURE DEMAND BY MARKET
 (million units)

Item	1999	2004	2009	2014	2019
Cap & Closure Demand					
Beverages:					
Beer					
Carbonated Soft Drinks					
Bottled Water					
Other Beverages					
Food					
Pharmaceuticals					
Other Markets					

SAMPLE TABLE

CHART VIII-1

WORLD CAP & CLOSURE MARKET SHARE
 (\$31.6 billion, 2009)

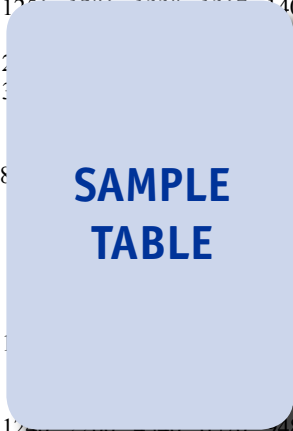


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-7
CHINA -- CAP & CLOSURE SUPPLY & DEMAND

Item	1999	2004	2009	2014	2019
Population (million persons)	1256	1326	1398	1475	1401
\$ GDP/capita	2	2	2	2	50
Gross Domestic Product (bil 2008\$)	3	3	3	3	90
% food & beverages					0
Food & Bev Mfg Value Added (bil 2008\$)					5
\$ C&C/capita					4
\$ C&C/000\$ GDP					8
\$ C&C/000\$ food & beverages					3
Cap & Closure Demand (mil \$)					30
+ net exports					50
Cap & Closure Shipments (mil \$)	1240	2200	4310	6370	7480



COMPANY PROFILES

Oricon Enterprises Limited

1076 Dr. E. Moses Road
 Worli, Mumbai 400018
 India
 91-22-24
 http://ww

Sales: \$
 Employe

Key Pro... closures and twist-off
 closures;



Oricon Enterprises is a manufacturer of petrochemicals and packaging. In addition, the Company maintains real estate, automobile dealership and shipping operations. The Company does business through five segments: Petrochemical, Trading, Packaging, Automobiles, and Shipping and Related Logistics.

The Company is active in the world cap and closure industry through the Packaging segment, which had FY 2010 revenues of \$13 million. The segment encompasses the operations of Oriental Containers Limited (India), a joint venture that is 30-percent held by Oricon Enterprises and 70-percent owned by Navigate Mauritius Limited (Malaysia), a private equity firm. In FY 2010, Oriental Containers had sales of \$46 million. The company manufactures metal and plastic closures, and tubes for food, beverage and other applications.

Metal closures from Oriental Containers encompass crowns, roll-on pilfer-proof (ROPP) closures and twist-off closures. Crowns are available under the HYCROWN brand name and feature transparent

“Demand for caps and closures in China is forecast to increase 8.4 percent per annum to \$6.3 billion in 2014, well above both the regional and global averages. All major product types are expected to experience robust gains, although growth will decelerate from the double-digit annual rates seen over the 1999-2009 period. This will follow similar deceleration in overall economic growth and manufacturing activity. Still, ...”
 --Section VI, pg. 190

OTHER STUDIES

Caps & Closures

US demand for caps and closures will rise 4% yearly through 2014. Advances will be aided by greater use of more costly dispensing and child-resistant closures, and by the ongoing popularity of single-serving containers. Plastic will remain the dominant material, while elastomer and rubber stoppers grow the fastest. This study analyzes the \$7.8 billion US cap and closure industry, with forecasts for 2014 and 2019 by raw material, product and market. It also evaluates company market share and profiles industry players.

#2688 October 2010 \$4900

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

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

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 Foodservice Disposables

Global demand for foodservice disposables is forecast to increase 4.8% annually through 2013. The US will remain the largest market by a wide margin, while more rapid growth is expected in China and other developing regions. Disposable foodservice packaging will be the fastest growing product segment. This study analyzes the \$38.5 billion world foodservice disposables industry, with forecasts for 2013 and 2018 by product, market, world region and for 18 countries. It also evaluates market share and profiles industry players.

#2573 November 2009 \$5600

About The Freedonia Group

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