World Rigid Packaging

Industry Study with Forecasts for 2016 & 2021

Study #2909 | July 2012 | $6100 | 409 pages
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World demand to increase 6.4% yearly through 2016

World demand for rigid packaging is forecast to increase 6.4 percent per year to $472 billion in 2016. Factors contributing to rising demand include growth in global manufacturing output, increased consumer spending on packaged goods worldwide, and demographic trends such as increasing urban populations, as urban consumers tend to use more packaged foods than their rural counterparts. Rigid packaging consumption will also be supported by the extensive and expanding recycling infrastructure for metal, glass, and plastic.

The largest markets for rigid packaging are food and beverages, which together represented 64 percent of total rigid packaging demand in 2011. Strong gains are expected for plastic bottles and containers due to cost and performance advantages, as well as further development of food-grade materials. Beverage applications for rigid packaging will benefit from expanded processing capacity. Rigid packaging demand in pharmaceutical applications is forecast to see above average growth, boosted by fast growing pharmaceutical manufacturing capabilities, especially in Asia.

Food & beverage market to benefit Asia/Pacific region

The most rapid gains in demand for rigid packaging will be seen in the world’s developing regions. In particular, the Asia/Pacific region will post the fastest growth and remain the largest market due to its large food and beverage industries. In contrast, market maturity in developed countries (as well as market saturation in bedrock applications such as bottled and canned beers and carbonated soft drinks) will serve to limit faster gains in rigid packaging demand. Overall, some of the best growth rates are expected in Indonesia, China, and India, with Brazil, Turkey, Russia, and Mexico also forecast to see strong gains.

Plastic to remain dominant, fastest-growing material

In terms of materials, plastic will continue to account for the largest share of demand and will also see the fastest gains, as plastic containers grab market share at the expense of paperboard, metal, and glass packaging in many applications. Gains for plastic containers will be attributable to their cost advantages over some alternatives, shatter resistance, resealability, graphics capabilities, ease of opening and dispensing, and improved resin and processing technologies.

Still, metal cans will remain an important segment of the rigid packaging mix due to their durability, long shelf life, tamper resistance, ease of storage, recyclability, and the economic advantages of canned items in controlling food expenditures, as metal cans are often used to package low-price food items. Opportunities for paperboard rigid packaging will reflect a competitive price structure, suitability for high quality graphics, and a favorable environmental profile. On the other hand, the heavier weight of glass containers and their risk of breakage will continue to limit applications -- especially in export markets -- due to high shipping costs.
Asia/Pacific

China: Rigid Packaging Markets

Demand for rigid packaging in China totaled $71.3 billion in 2011, representing more than one-half of total demand in the Asia/Pacific region. Over the past decade, China’s market has experienced very strong growth, averaging 17 percent per annum between 2001 and 2011. Strong gains in manufacturing activity, personal income levels, and consumer expenditures, combined with favorable urbanization trends, will continue to boost demand for packaged goods. In the coming years, these factors will continue to support rigid packaging requirements in China, as well as increased exports of Chinese goods to more advanced consumer economies (which will create the need for higher-quality and more environmentally friendly packaging). Still, China’s rigid packaging industry will remain much less developed than that of countries like Japan (with much lower per capita consumption), a reflection of the large share of rural and relatively less affluent Chinese citizens.

Through 2016, demand for rigid packaging in China is forecast to increase close to 13 percent per year to $130 billion, well above both the regional and global averages. Food, beverage, and pharmaceutical products -- are expected to experience the fastest gains. By contrast, consumer goods sectors will decelerate from the pace seen over 2001-2011, and will follow similar decelerations in manufacturing activity. Still, continued expansions in these sectors (i.e., food and beverages) will support rigid packaging demand through the forecast period and beyond.

The pharmaceutical market will continue to see above average growth, providing good opportunities for rigid packaging demand. The impact of regulatory reforms, coupled with the expansion of distribution and development activities, will underlie gains. Most pharmaceutical packaging products will record fast-paced sales increases.

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**TABLE VI-5**

**CHINA: RIGID PACKAGING DEMAND BY MARKET**

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**CHART VIII-1**

**WORLD RIGID PACKAGING MARKET SHARE, 2011**

($345 billion)

[Sample Chart Image]
Albéa Group is a manufacturer of packaging products for the cosmetics, fragrance, skin care, personal care, and oral care markets. The Company is a subsidiary of Sun Capital Partners Incorporated (Boca Raton, Florida), a private equity firm.

The Company is active in the world rigid packaging industry through the manufacture of plastic, laminate, and other tubes, as well as jars and bottles. Plastic tubes are cylindrical types with 13.5- to 60-millimeter diameters made in monolayer or multilayer structures. These plastic tubes, which have capacities of up to 500 milliliters, are suitable for packaging shampoos, lotions, and other items. Albéa Group’s plastic tubes are available with a range of closures, including flip-top and screw-on caps. The Company also makes PRECITUBE pumps for use with its plastic tubes, which allow for airless dispensing. Furthermore, Albéa Group makes ENCORE plastic tubes, which are produced from over 50-percent recycled high density polyethylene.

Laminate tubes from Albéa are constructed using either an aluminum foil or ethylene vinyl alcohol (EVOH) layer inside a multilayer...
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