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Caps & Closures

US Industry Study with Forecasts for **2016 & 2021**

Study #2975 | December 2012 | $5200 | 331 pages

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Caps & Closures

US Industry Study with Forecasts for ***2016 & 2021***

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Table of Contents

List of Tables

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

RAW MATERIALS

PRODUCTS

MARKETS

INDUSTRY STRUCTURE

List of Charts

MARKET ENVIRONMENT

RAW MATERIALS

PRODUCTS

MARKETS

INDUSTRY STRUCTURE

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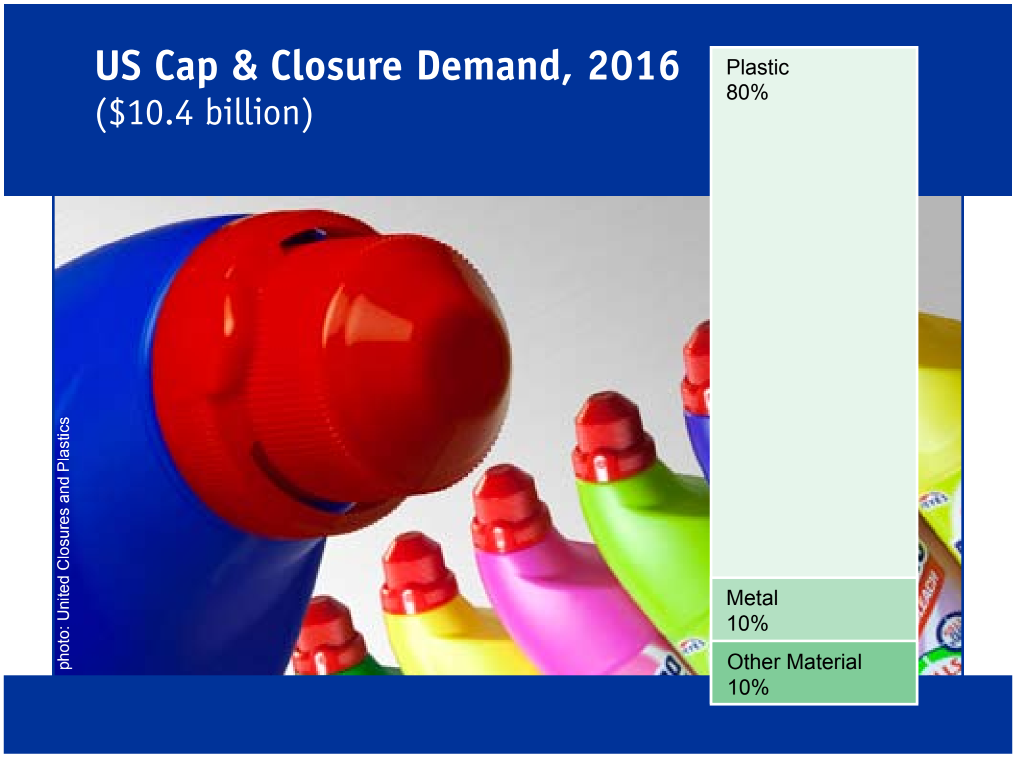
Value gains will benefit from material price increases and greater use of dispensing and child-resistant closures (CRCs), while unit advances will be driven by more single-serving containers.

US demand to rise 4.4% annually through 2016

US demand for caps and closures is projected to increase 4.4 percent annually to $10.4 billion in 2016, reaching 280 billion units. Gains will be supported by material price increases and greater use of value-added dispensing and child-resistant closures (CRCs). Unit advances will be driven by the continued popularity of single-serving containers, especially in the beverage market; further inroads by plastic containers into closureless containers such as metal cans; and the use of closures on other container types such as gable-top cartons, aseptic cartons, and stand-up pouches. Preventing faster growth will be the maturity of several large beverage applications and competition from closureless packaging options, such as aluminum beverage cans, peelable lidding, most stand-up pouches, and blister packs.

Plastic caps & closures to offer best opportunities

Plastic caps and closures, by far the leading closure material type with 79 percent of unit demand in 2011, will post above average unit and value increases through 2016 based on the significance of plastic containers and the expanded use of plastic closures on other container types. Gains will be supported by the long-term shift in the consumer packaging mix away from glass and metal containers to plastic alternatives, as



US Cap & Closure Demand, 2016
($10.4 billion)

plastic containers tend to employ plastic closures. Plastic cap and closure demand is forecast to climb 4.7 percent per year to $8.4 billion in 2016, with unit demand nearly 225 billion. Decelerated value growth will be based on a moderation in resin price increases and further lightweighting of closures for sustainability and to reduce costs. Nonetheless, prospects will be aided by growing demand for dispensing closures, which are generally more expensive than standard types and favored by consumers for their convenience and ease of use.

Metal cap and closure demand is expected to increase 1.5 percent per year to $1 billion in 2016, though units will continue to decline as a result of losses to plastic closures and a resurgent market for aluminum cans in the beer market. Demand for aluminum roll-on closures will be aided by growing use of these caps in wine packaging. Among other closure types, elastomer and rubber stopper demand will register healthy gains, driven by the continuing commercialization of injectable biotechnology-based drugs and the increased preference for stoppers made from higher value synthetic rubber and thermoplastic elastomers. Though cork demand will increase marginally in unit terms, this performance will actually represent an improvement following declines caused by competition from synthetic corks and metal caps in the wine market.

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Sample Text, Table & Chart

SAMPLE TEXT

PRODUCTS

Dispensing

Demand for plastic dispensing closures is projected to i percent annually to g the ov cap and closure seg nsumer for the convenience closur terms, demand will billion than the 2006-2011 ricing a growing maturity o

Dispensing closures are utilized in a broad array of mar ing food, beverages, cosmetics and toiletries, nutritional supp household cleaners, and automotive chemicals. In addition t enhanced convenience and ease of use to consumers, dispens are valued by packaged goods manufacturers as they enable t to add value to their products and differentiate goods on retai As a result, these closures will continue to gain ground at the expense of more conventional closures, such as screw caps. For example, in May 2012 PepsiCo switched the packaging of its 89-ounce TROPICANA orange juice from white HDPE handled bottles to clear handled PET containers with custom flip-top closures rather than standard screw caps. This closure, developed and produced by AptarGroup, also serves to differentiate the product at retail.

Growth in the dispensing closure market has also been helped by the popularity of inverted plastic squeeze bottles for food and personal care products. Such bottles and their related dispensers (usu snap-open types) have become favored in applications such mustard, and other condiments for enabling fast, efficient dis contents that are typically messy or cumbersome when dispe alternative container types such as glass bottles with metal s caps.

97

TABLE IV-7

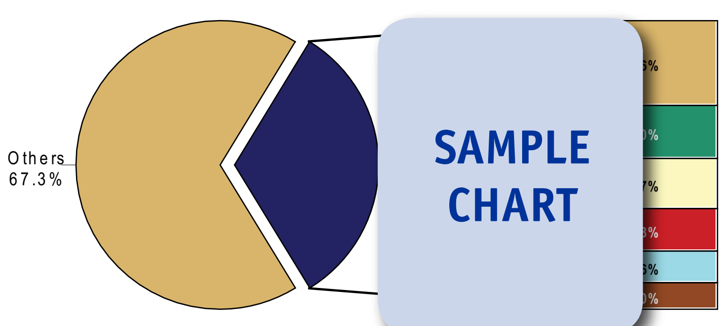
PLASTIC DISPENSING CAP & CLOSURE DEMAND BY TYPE & MARKET (million units)

SAMPLE TABLE

Item	2001	2006	2011	2016	2021
Plastic Caps & Closures (bil units)					
% dispensing					
Plastic Dispensing Caps & Closures					
By Type:					
Pump, Trigger, & Spray					
Other					
By Market:					
Beverages					
Food					
Other					
cents/unit					
Plastic Dispensing Caps/Closures (mil					
Pump, Trigger, & Spray					
Other					

CHART VI-1

US CAP & CLOSURE MARKET SHARE ($8.4 billion, 2011)



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Sample Profile, Table & Forecast

TABLE V-14

FOOD CAP & CLOSURE DEMAND BY APPLICATION & MATERIAL (million dollars)

Item	2001	2006	2011	2016	2021
Food Container Demand (bil units)					
% with closures					
Food Caps & Closures (mil units)					
cents/unit					
Food Cap & Closure Demand					
By Application:					
Dairy Products					
Sauces & Condiments					
Other Foods					
By Material:					
Plastic					
Metal					
Other Materials					

SAMPLE TABLE

COMPANY PROFILES

Nomacare LLC
400 Vintage Park Drive
Zebulon, NC
919-460-2200
http://www.nc

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

Nomacorc is a manufacturer of synthetic corks. The privately held company is owned by Noel Group LLC (Zebulon, North Carolina).

The Company produces synthetic corks using a coextrusion process in which a flexible outer skin is thermally bonded to a foamed cylinder core. Synthetic corks from Nomacorc are polymer based, highly elastic types that are typically used with wine bottles. These corks are designed to provide consistent bottle insertions and smooth extractions, emit no flavors into the wine, and remain intact. Moreover, the corks are engineered to offer protection against cork taint, leakage, and oxidation. Nomacorc's corks can accommodate printing and are available in a range of colors.

Among the Company's specific synthetic corks are NOMACORC CLASSIC+, NOMACORC LIGHT, NOMACORC SMART+, NOMACORC PREMIUM, and NOMACORC SELECT SERIES varieties. NOMACORC CLASSIC+ corks, which are available with a woodgrain appearance and in a range of colors, are designed to provide a 33 percent lower oxygen transfer rate than the Company's previous generation NOMACORC CLASSIC corks. NOMACORC LIGHT

295

"Demand for caps and closures in dairy product packaging is projected to increase 4.0 percent per year to $480 million in 2016, with gains benefiting from increased demand for dispensing closures, the growing popularity of premium ice cream in single-serving cups, and continued favorable growth for drinkable yogurt products. In unit terms, demand will climb 1.8 percent annually to 13.9 billion units in 2016. Below average unit prospects will be the result of competition from flexible lidding and the increasing maturity of some applications."
--Section V, pg. 201

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Other Studies

World Caps & Closures

World demand for caps and closures is projected to rise 5.3 percent per year to $46 billion in 2016, led by developing regions. Beverages will remain the dominant market, while opportunities in the food market will benefit from dispensing and other value-added closures such as non-drip flip top pourer caps. This study analyzes the $35.8 billion world cap and closure industry, with forecasts for 2016 and 2021 by material, market, world region and for 18 countries. The study also evaluates company market share and profiles industry participants.

#2986 .... February 2013 .... $6300

Plastic Containers

US demand for plastic containers is forecast to increase 4.9 percent annually to $32.4 billion in 2016, consuming 14.2 billion pounds of resin. Plastic bottles and jars will remain the dominant segment but will be outpaced by other plastic container types, including tubs, cups, bowls and pails. Among the leading resins, PET will continue outpacing HDPE. This study analyzes the 13 billion pound US plastic container industry, with forecasts for 2016 and 2021 by type and resin. The study also evaluates company market share and profiles industry players.

#2954 .... October 2012 .... $5100

Cups & Lids

US demand for cups and lids is forecast to increase 4.1 percent per year to $8.9 billion in 2016. Although drinking cups will continue to dominate, the fastest gains are anticipated in the packaging cup segment due to solid outlooks for demand in key packaging cup-using markets such as yogurt, coffee and tea, and fresh fruits and vegetables. This study analyzes the $7.2 billion US cups and lids industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry players.

#2935 .... August 2012 .... $5100

Pouches

Demand for pouches in the US is projected to increase 5.1 percent per year to $8.8 billion in 2016. Gains will be driven by faster growth for stand-up pouches stemming from sustainability, functional, and marketing advantages over alternative packaging media. The nonfood market will slightly outpace the dominant food market. This study analyzes the $6.9 billion US market for pouches, with forecasts for 2016 and 2021 by type, market, feature and production method. The study also evaluates company market share and profiles industry players.

#2899 .... July 2012 .... $4900

World Aseptic Packaging

World demand for aseptic packaging is projected to grow 9.1 percent annually to $35.8 billion in 2015. India and China will experience the fastest increases in demand. Gains in the US will reflect the broadening aseptic filling requirements for liquid pharmaceuticals. Beverages will remain the dominant market worldwide. This study analyzes the $23.2 billion world aseptic packaging industry, with forecasts for 2015 and 2020 by product, market, world region and for 17 countries. The study also evaluates company market share and profiles industry competitors.

#2859 .... March 2012 .... $5900

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