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# World Caps & Closures

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

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Study #2986 | February 2013 | \$6300 | 437 pages

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*Unit advances will be driven by the continued popularity of single-serving beverage bottles and further inroads by plastic containers into closureless packaging segments such as metal cans.*

## World demand to rise 5.3% annually through 2016

World demand for caps and closures is projected to rise 5.3 percent per year to \$46.4 billion in 2016. In volume terms, demand will grow 4.1 percent annually to 1.9 trillion units. Value gains will be supported by raw material price increases and greater use of value-added closures such as dispensing, child-resistant, and tamper-evident types. Unit advances will be driven by the continued popularity of single-serving bottles in the beverage market and further inroads by plastic containers into closureless packaging segments such as metal cans. Other factors contributing to rising demand include growth in global manufacturing output, increased consumer spending on packaged goods worldwide, and the use of closures on popular container types such as gabletop cartons, aseptic cartons, and spouted stand-up pouches.

## Beverage segment to remain dominant market

The beverage segment will remain by far the single largest cap and closure market. Gains will be supported by the continued popularity of single-serving beverages and the widening presence of plastic bottles in markets once dominated by metal cans. However, preventing faster gains will be the maturity of several large beverage applications such as beer and carbonated soft drinks. Also moderating demand growth will be

## World Cap & Closure Demand (\$46.4 billion, 2016)



Asia/Pacific 36%
North America 28%
Western Europe 22%
Other Regions 14%

photo: Master Molded

continued competition from closureless packaging options, such as aluminum beverage cans, peelable lidding, and pouches. Furthermore, a significant deceleration in bottled water growth due to environmental concerns will also moderate cap and closure prospects, as will the commodity nature of most beverage closures. Opportunities in the food market will benefit from demand for dispensing and other value-added closures such as non-drip flip top pourer caps, boosted by convenience advantages. In terms of materials, plastic will continue to account for the largest share of cap and closure demand and will also see the fastest increases. Plastic containers, which typically use plastic closures, will continue to gain market share

## Developing regions to see fastest growth in demand

Overall, the most rapid increases in cap and closure demand will occur in the world's developing regions. The Asia/Pacific region (especially developing Asian countries) will post fast gains and remain the biggest market due to its large food and beverage industries. The highest growth rates are expected in India and China, with Indonesia, Brazil, Russia, and Mexico also expected to see robust advances. In contrast, market maturity in developed countries (as well as market saturation in bedrock applications such as bottled beer, water, and carbonated soft drinks) will moderate overall growth.

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## Sample Text, Table & Chart

### OTHER REGIONS

**Brazil: Cap & Closure Demand by Market** -- Beverages represent the largest cap and closure market in Brazil, accounting for four-fifths of total volume demand in 2011. In particular, beer is one of the world's leading consumers of carbonated soft drinks. Brazil will remain a significant market for plastic closures. In addition, the important beer industry (the country is the third largest beer producer in the world, behind China and the US) will continue to support demand for metal crown caps used on glass beer bottles. However, competition from closureless beer cans will prevent faster increases.

Demand for caps and closures in the food market will be supported by increases in food output, rising incomes, the growing presence of large retail outlets (i.e., supermarkets), and greater interest in food packaging as a marketing tool for consumer products. In addition, a number of demographic factors will continue to influence demand. Increasing urbanization, smaller household sizes, and Brazil's expanding middle class population will increase food spending, boosting demand for related containers and closures. Some shifting toward value-added closures, such as dispensing types often used in vending machines, will further support demand. Brazil will continue to expand its export opportunities for higher-quality caps and closures.

Although increasing at a slower rate, pharmaceutical packaging is a market for caps and closures will remain underdeveloped. Since generic and other commodity medicines make up the majority of Brazil's pharmaceutical shipments, twist-off plastic caps and other basic, low value-added closures will continue to make up the largest share of cap and closure demand among pharmaceutical packaging products. Still, good opportunities will emerge for a number of higher-priced closures. For instance, growth is expected for tamper-evident caps and closures, as manufacturers seek to prevent the penetration of counterfeit medicines.

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TABLE VII-6

**BRAZIL: CAP & CLOSURE DEMAND BY MARKET**  
(million units)

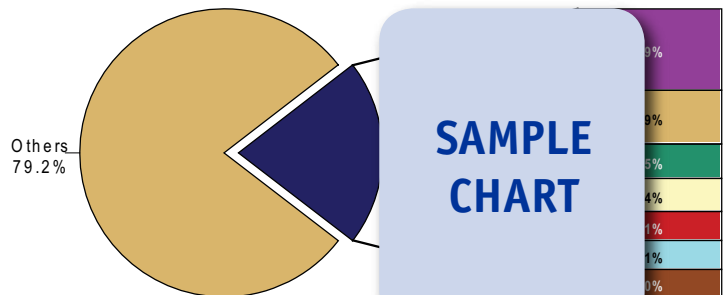
Item	2001	2006	2011	2016	2021
Cap & Closure Demand					
Beverages:					
Beer					
Carbonated Soft Drinks					
Bottled Water					
Other Beverages					
Food					
Pharmaceuticals					
Other Markets					

SAMPLE  
TABLE

SAMPLE  
TEXT

CHART VIII-1

**WORLD CAP & CLOSURE MARKET SHARE**  
(\$35.8 billion, 2011)



SAMPLE  
CHART

## Sample Profile, Table & Forecast

**TABLE VII-5**  
**BRAZIL:**  
**CAP & CLOSURE DEMAND BY MATERIAL**

Item	2001	2006	2011	2016	2021
C & S America Caps & Closures (mil % Brazil)					
Cap & Closure Demand (mil \$) cents/unit					
Cap & Closure Demand (mil units)					
Plastic					
Metal					
Rubber & Cork					



**COMPANY PROFILES**

**Oricon Enterprises Limited**  
 1076 Dr. E. Moses Road  
 Worli, Mumbai 400018  
 India  
 91-22-24600000  
 http://www.oricon.com

Sales: \$1.2 billion (2012)  
 Geographical: 88% India, 8% and Others 2%  
 Employees: 1,200

Key Products: Metal closures, and twist-off closures.

Oricon Enterprises is a producer of petrochemicals and packaging. In addition, the Company maintains real estate, automobile dealership, and shipping operations. The Company does business through seven segments: Shipping, Automobiles, Packaging, Petrochemicals, Liquid Colorants, Trading, and Others.

The Company is involved in the world cap and closure industry through the Packaging segment, which had FY 2012 revenues of \$17 million. The sector 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. The company makes metal and plastic closures, and tubes for food, beverage, and other applications.

Among Oriental Containers' metal closures are crowns, roll-on pilfer-proof (ROPP) closures, and twist-off closures. Crowns are sold under the HYCROWN brand name and feature transparent double ring liners for improved gas retention. ROPP closures are produced under

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"In volume terms, demand for caps and closures in Brazil will increase 5.1 percent annually to 86.2 billion units in 2016. Economic expansion, further investment in the closure-intensive processed food and beverage industries, and rising consumer expenditures will be among the primary growth factors."

--Section VII, pg. 260





**OTHER STUDIES**

**World Food Containers**

World demand for food containers is forecast to rise 4.5 percent annually to \$139 billion in 2017. While the US remains by far the world's largest user of food containers, the most significant growth will occur in India and China. Bags and pouches will remain the largest category based on their light weight, portability and convenience. This study analyzes the \$111.4 billion world food container industry, with forecasts for 2017 and 2022 by product, market, world region, and for 22 countries. The study also evaluates company market share and profiles industry players.

#3124 ..... February 2014 ..... \$6100

**Beverage Containers**

US demand for beverage containers will rise 1.7 percent annually through 2017 to 265 billion units, valued at \$29.1 billion. Unit gains will be driven by ongoing consumer preference for single-serving containers. Plastic containers will remain both the largest and fastest growing segment, driven by PET containers in the noncarbonated RTD beverage market. This study analyzes the 244 billion unit US beverage container industry, with forecasts for 2017 and 2022 by material and market. The study also evaluates company market share and profiles industry participants.

#3076 ..... September 2013 ..... \$5100

**Cups & Lids**

World cup and lid demand will rise 5.0 percent per year to \$25.9 billion in 2017. The fastest gains will occur in developing regions, while demand in developed areas will be supported by the increasing use of costlier biodegradable and compostable products. Food and beverage packaging will be the fastest growing market. This study analyzes the \$20.3 billion world cup and lid industry, with forecasts for 2017 and 2022 by product, material, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry competitors.

#3012 ..... June 2013 ..... \$6100

**Caps & Closures**

US demand for caps and closures will rise 4.4 percent annually to \$10.4 billion in 2016. The dominant plastic cap and closure segment will post above average increases. Beverages will remain the largest market, while pharmaceuticals will be the fastest growing. Among other closure types, elastomer and rubber stopper demand will register healthy gains. This study analyzes the \$8.4 billion US cap and closure industry, with forecasts for 2016 and 2021 by raw material, product and market. The study also evaluates company market share and profiles industry players.

#2975 ..... December 2012 ..... \$5200

**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

**About The Freedonia Group**

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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