Caps & Closures

US Industry Study with Forecasts for 2018 & 2023

Study #3195 | August 2014 | $5300 | 353 pages
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Gains will be driven by advancing container unit growth, the popularity of single serving containers, and greater use of costlier products such as dispensing and child-resistant closures.

**US demand to rise 4% annually through 2018**

US demand for caps and closures is projected to advance 4.0 percent per year to $11.1 billion in 2018, with unit demand exceeding 300 billion. Gains will be driven by an acceleration in container unit growth relative to that of the 2008-2013 period, the continued popularity of single serving containers (especially in the beverage market), and greater use of costlier product types, such as dispensing and child-resistant closures (CRCs). Growth for dispensing types will benefit from consumer trends favoring convenience and ease of use, as well the ability of these closures to differentiate products at retail. CRC demand will be driven by the need to comply with federal requirements mandating child-resistant packaging of pharmaceuticals as well as many household products. Preventing faster growth will be the maturity of several large beverage applications and competition from closureless packaging options such as aluminum cans, most stand-up pouches, blister packs, and peelable lidding.

**Dispensing closures to pace key plastic segment**

Plastic caps and closures, which comprised 81 percent of unit demand in 2013, will post unit and value advances in line with the overall averages through 2018, reflecting the significance of plastic containers in numerous markets and the growing prevalence of plastic closures on other container types. The outlook for plastic closures will be constrained by the already-high penetration of plastic containers in most markets and a lack of new large volume applications. Through 2018, plastic cap and closure demand is forecast to climb 4.1 percent annually to $8.9 billion, with unit demand reaching 245 billion. Dispensing closures will enjoy the fastest growth based on their convenience and functionality benefits.

Metal cap and closure demand is expected to rise 2.4 percent per year to $1.1 billion in 2018. Despite ongoing losses due to inroads by plastic closures and the resurgence of aluminum cans in the beer market, units will increase modestly based on greater use of roll-on closures with wine and opportunities for screw and lug closures with ready to drink beverages such as iced tea and coffee, which are frequently packaged in glass. In addition, demand for metal closures such as paint can lids will benefit from rising paint sales spurred by a rebound in the construction market following low levels during the 2008-2013 period. Among other closure types, elastomer and rubber stoppers will post solid gains, benefiting from the continued commercialization of injectable biotechnology drugs and preferences for stoppers made from higher value synthetic rubber and thermoplastic elastomers. Cork will continue to lose share to alternative wine closures.
Demand for polypropylene in caps and closures is expected to increase from 1.1 billion pounds in 2018, slightly lagging the plastic average due to further transitioning to HDPE in many of the closure types where polypropylene already dominates, such as child-resistant and dispensing closures. Despite competition from HDPE, polypropylene will maintain its position as the leading resin for closures due to healthy growth in many of the closure types where the resin already dominates, such as child-resistant and dispensing closures for food and beverages. Also supporting gains will be properties such as stiffness, suitability for lightweighting, and shorter cycle times.

While polypropylene was historically the dominant closure material in the carbonated soft drink market, the material has largely been replaced with HDPE caps based on cost and sustainability advantages. In recent years, the development of abundant natural gas feedstocks in the US has put polyethylene (which relies on natural gas feedstocks) into a more cost advantaged position than polypropylene. Additionally, polypropylene soft drink closures are two-piece compression molded types with thermoplastic elastomer liners that provide a seal, while HDPE closures are injection molded and have a one-piece construction (without an inner liner due to HDPE’s adequate flexibility), making them easier to recycle and more efficient to produce.

Polypropylene has several key advantages in cap and closure applications. For example, polypropylene injection molded caps and closures have very smooth surfaces, extremely accurate sizing and tolerances, and superior sealing for pressurized and nonpressurized liquids. In addition, the resin is lightweight, possesses good dimensional stability and is resistant to stress-cracking, oils, greases, acids, alkalies, and most solvents. Polypropylene also has a natural translucence, high optical clarity, good chemical compatibility, and high heat tolerance.

### Table V-14

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
</tr>
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<tr>
<td>Food Container Demand (bil units)</td>
<td>116.8</td>
<td>137.0</td>
<td>154.1</td>
<td>174.5</td>
<td>195.4</td>
</tr>
<tr>
<td>% with closures</td>
<td>31.2</td>
<td>29.6</td>
<td>28.6</td>
<td>28.4</td>
<td>28.3</td>
</tr>
<tr>
<td>Food Caps &amp; Closures (mil units)</td>
<td>36426</td>
<td>40502</td>
<td>44090</td>
<td>49520</td>
<td>55350</td>
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<tr>
<td>cents/unit</td>
<td>2.3</td>
<td>2.8</td>
<td>3.1</td>
<td>3.4</td>
<td>3.7</td>
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<td>Food Cap &amp; Closure Demand By Application:</td>
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<td>1140</td>
<td>1370</td>
<td>1675</td>
<td>2050</td>
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<tr>
<td>Dairy Products</td>
<td>240</td>
<td>360</td>
<td>440</td>
<td>545</td>
<td>660</td>
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<tr>
<td>Sauces &amp; Condiments</td>
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<td>Other Foods</td>
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<td>425</td>
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<td>By Material:</td>
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<td>970</td>
<td>1240</td>
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<td>Plastic</td>
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<td>Metal</td>
<td>95</td>
<td>140</td>
<td>175</td>
<td>210</td>
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</tbody>
</table>

### Chart VI-1

**US CAP & CLOSURE MARKET SHARE, 2013**

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## Sample Profile, Table & Forecast

### COMPANY PROFILES

**Blackhawk Molding Company Incorporated**  
120 West Interstate Road  
Addison, IL 60101  
630-458-2100  
http://www.blackhawkmolding.com

- **Annual Sales:** $70 million (estimated)  
- **Employment:** 250 (estimated)  
- **Key Products:** plastic caps

Blackhawk Molding manufactures plastic injection molded products for the dairy, bottled water, juice, and other industries. The Company is privately held.

The Company is involved in the US cap and closure industry through the manufacture of plastic caps for use in bottled water, other beverage, dairy, and other applications. These caps are available in 28-, 33-, 38-, 48-, and 55-millimeter (mm) sizes. Blackhawk Molding’s 28-mm caps feature a plug seal design and are made from polyethylene and polypropylene materials. The Company’s 33-mm caps are press-on types that are available with labels and in a range of colors. Among Blackhawk Molding’s 38-mm caps are REVO-CAP, TOP SEAL, LT, SUPER QUAD, and single-thread products. For example, REVO-CAP caps feature a protrusion on the top of the cap that is designed to remove the foil seal of the packaged product. The Company’s 48-mm caps are intended for use on standard bottle neck finishes. Among Blackhawk Molding’s 55-mm caps is the SAFEGARD cap, which is designed for use on 3- or 5-gallon water jugs. SAFEGARD caps are engineered to eliminate spilling when the jug is placed on the cooler.

Manufacturing operations are conducted by the Company at sites in the US and Poland. In the US, Blackhawk Molding maintains

### TABLE IV-13

**METAL CAP & CLOSURE SUPPLY & DEMAND**  
(million dollars)

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<tr>
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<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Glass Bottle &amp; Jar Demand (bil units)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>closures/units</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metal Cap/Closure Demand (mil units)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>cents/unit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metal Cap &amp; Closure Demand</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Screw &amp; Lug Caps</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crowns</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roll-Ons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>+ net exports</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metal Cap &amp; Closure Shipments</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

This Freedonia study, **Caps & Closures**, provides historical data (2003, 2008, 2013) plus forecasts for 2018 and 2023 for demand type by unit and value in current dollars; demand data by market and material are also presented in current dollars and units. The study also details key market environment factors, evaluates company market share and profiles 33 competitors in the US cap and closure industry.
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World Caps & Closures
World cap and closure demand will rise 5.6 percent yearly to $58 billion in 2019. The Asia/Pacific and Africa/Mideast markets will grow the fastest, while North America will remain a leading outlet. The beverage market will be driven by bottled water. In wine bottles, the shift toward metal screw caps and plastic stoppers will continue. This study analyzes the $4.43 billion world cap and closure industry, with forecasts for 2019 and 2024 by material, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants. #3259 .......... April 2015 .......... $6500

World Pouches
Global demand for pouches will rise 6.2 percent annually to $37.3 billion in 2018. Stand-up pouches will grow the fastest, while flat pouches remain dominant. The adoption of pouches with higher value features in developed markets will support value gains, while faster volume growth is expected in China and other developing nations. This study analyzes the $27.6 billion world pouches industry, with forecasts for 2018 and 2023 by product, market, world region, and for 16 countries. The study also evaluates company market share and profiles industry players. #3220 .......... November 2014 .......... $6200

Pharmaceutical Packaging Products
Demand for pharmaceutical packaging products in the US will increase 4.9 percent annually to $22.1 billion in 2018. Led by prefilled syringes, vials, and preixed IV systems, parenteral containers will post the fastest growth in both revenue and unit demand as new injectable biological and bioengineered therapies are introduced into the marketplace. This study analyzes the $17.4 billion US pharmaceutical packaging industry, with forecasts for 2018 and 2023 by material and market. The study also evaluates company market share and profiles industry players. #3193 .......... July 2014 .......... $5300

Cups & Lids
US demand for cups and lids will expand 4.4 percent per year to $10.0 billion in 2018. Packaging cups will experience the fastest gains based on convenience and single-serving advantages, as well as favorable consumption trends in several key applications. Lids will outpace cups due to more drinking cups using lids and heightened demand for costlier specialty lids. This study analyzes the $8.1 billion US cup and lid industry, with forecasts for 2018 and 2023 by product and market. The study also evaluates company market share and profiles industry players. #3174 .......... July 2014 .......... $5300

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

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Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company’s specific needs, companies harness Freedonia’s research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia’s team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.