Tube & Stick Packaging

US Industry Study with Forecasts for 2018 & 2023

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT
General ........................................ 4
Macroeconomic Outlook .............. 5
Demographic & Household Trends .... 9
Consumer Income & Spending .... 13
Manufacturing Outlook ............... 16
Building Construction Expenditures 20
Retail Sales Outlook ................. 22
Packaging Industry Outlook ......... 26
Paper ....................................... 29
Plastic ..................................... 30
Metal ....................................... 31
Glass & Wood ............................ 31
Pricing Trends ............................. 32
Environmental & Regulatory
Considerations ............................. 35
International Activity & Foreign Trade 39

PRODUCTS
Types ........................................ 43
Squeeze Tubes ............................ 46
Laminate Tubes .......................... 50
Plastic Tubes ............................. 54
Extruded Plastic Tubes ............... 54
Other Plastic Squeeze Tubes ....... 59
Collapsible Metal Tubes ............. 60
Twist Tubes ................................ 63
Cartridges .................................. 67
Stick Packs ................................ 71
Food Applications ....................... 74
Nonfood Applications ............... 76
Other Tubes & Sticks ............... 77
Materials ................................... 80
Plastic .................................... 83
Squeeze Tubes ......................... 86
Twist Tubes ............................. 87

MARKETS
General ....................................... 95
Cosmetics & Toiletries ............... 98
Cosmetic & Toiletry
Industry Outlook ........................ 99
Tube & Stick Packaging Demand ..... 101
Toothpaste ............................... 104
Lip Products .............................. 106
Hair Care .................................. 109
Skin Care .................................. 112
Deodorant ................................. 115
Eye & Face Cosmetics ............... 117
Other ....................................... 120
Pharmaceuticals ......................... 122
Pharmaceutical Industry Outlook .. 123
Tube & Stick Packaging Demand ..... 126
Adhesives & Sealants .................. 131
Adhesive & Sealant
Industry Outlook ........................ 132
Tube & Stick Packaging Demand ... 134
Food ......................................... 137
Food Industry Outlook ................ 137
Tube & Stick Packaging Demand ... 140
Other Markets ............................ 144

INDUSTRY STRUCTURE
General ...................................... 148
Market Share .............................. 151
Acquisitions & Divestitures ........ 156
Marketing & Distribution ........... 159
Competitive Strategies ............... 161
Cooperative Agreements ............. 162

COMPANY PROFILES
Albéa Group .................................. 166

Amcor Limited ............................ 171
Armbrust Paper Tubes ............... 173
Bemis Company .......................... 174
Berry Plastics ............................ 175
Calibre International ................... 177
CCL Industries ............................ 178
Clariant International ................ 180
Coveris Holdings ....................... 182
CPP Global ............................... 183
Crystal-Vision Packaging Systems .. 185
Deutsche Post ............................ 186
Essel Propack .............................. 187
Fischbach KG .............................. 189
HCP Packaging Shanghai ........... 191
HCT Group ................................. 193
IntraPac International ................ 195
Iridium Industries ...................... 196
JSN Industries ........................... 197
Packaging Coordinators ............. 198
Pattison (Jim) Group ................. 200
Plastek Industries ....................... 202
Plastube Incorporated ............... 203
Printpack Incorporated ............. 204
RPC Group ................................. 206
Silgan Holdings ........................ 208
Sinclair & Rush ......................... 209
Sonoco Products ....................... 212
T.H.E.M. .................................. 214
Tstix Proprietary ....................... 215
Tuboplast CTL ............................ 217
Tulox Plastics ............................ 218
Unette Corporation ..................... 219
Unicep Packaging ...................... 221
Viva Group ................................. 223
World Wide Packaging ............. 225
Additional Companies in
Tube & Stick Packaging ............ 227
List of Tables

EXECUTIVE SUMMARY
1 Summary Table.................................. 3

MARKET ENVIRONMENT
1 Macroeconomic Indicators................. 9
2 Population & Households ................. 13
3 Personal Consumption
   Expenditures .................................. 16
4 Manufacturers’ Shipments ............... 20
5 Building Construction
   Expenditures ................................... 22
6 Retail Sales ..................................... 26
7 Packaging Supply & Demand .......... 28
8 Selected Tube & Stick
   Packaging Prices ............................... 35

PRODUCTS
1 Tube & Stick Packaging
   Demand by Type ............................... 45
2 Squeeze Tube Demand
   by Type & Market ......................... 49
3 Laminate Tube Demand
   by Market ..................................... 53
4 Extruded Squeeze Tube Demand ....... 54
5 Other Plastic Squeeze Tube
   Demand by Market ......................... 60
6 Collapsible Metal Tube
   Demand by Market .......................... 63
7 Twist Tube Demand by Market ......... 66
8 Cartridge Demand by
   Material & Market ........................... 71
9 Other Tube & Stick Packaging
   Demand by Market ........................... 80
10 Tube & Stick Packaging
    Demand by Material ........................ 82
11 Plastic Tube & Stick Packaging
    Demand by Type ......................... 85
12 Metal Tube & Stick Packaging
    Demand by Type ......................... 92
13 Paper Tube & Stick Packaging
    Demand by Type ......................... 94

MARKETS
1 Tube & Stick Packaging
   Demand by Market ........................... 97
2 Cosmetic & Toiletry Shipments ....... 101
3 Cosmetic & Toiletry Market
   for Tube & Stick
   Packaging by Application ................. 103
4 Toothpaste Market for
   Tube Packaging .............................. 106
5 Lip Product Market for Tube
   & Stick Packaging ............................ 109
6 Hair Care Market for Tube
   & Stick Packaging ............................ 111
7 Skin Care Market for Tube
   & Stick Packaging ............................ 115
8 Deodorant Market for Tube
   & Stick Packaging ............................ 117
9 Eye & Face Cosmetics Market
   for Tube & Stick Packaging ............... 120
10 Other Cosmetic & Toiletry Markets
    for Tube & Stick Packaging ............... 122
11 Pharmaceutical Supply
    & Demand ................................... 126
12 Pharmaceutical Market for
    Tube & Stick Packaging ..................... 131
13 Adhesive & Sealant Shipments ....... 133
14 Adhesive & Sealant Market
   for Tube & Stick Packaging ............... 137
15 Food Shipments ............................. 140
16 Food Market for Tube
   & Stick Packaging ............................ 144
17 Other Markets for Tube
   & Stick Packaging ............................ 147

INDUSTRY STRUCTURE
1 US Tube & Stick Packaging
   Sales by Company, 2013 ............... 150
2 Selected Acquisitions
   & Divestitures ............................... 158
3 Selected Cooperative
   Agreements ................................. 164

List of Charts

PRODUCTS
1 Tube & Stick Packaging
   Demand by Type, 2013 ..................... 46
2 Squeeze Tube Demand
   by Type, 2013 ............................... 50
3 Tube & Stick Packaging Demand
   by Material, 2013 ........................... 82
4 Plastic Tube & Stick Packaging
   Demand by Type, 2013 ..................... 86

MARKETS
1 Tube & Stick Packaging
   Demand by Market, 2013 ............... 98
2 Cosmetic & Toiletry Market
   for Tube & Stick Packaging
   by Application, 2013 ..................... 104

INDUSTRY STRUCTURE
1 US Tube & Stick
   Market Share, 2013 ....................... 152
Growth will be fueled by recoveries in manufacturing and construction from post-recession troughs, and by improved output in the key cosmetics, toiletries, and pharmaceuticals markets.

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

Demand for tube and stick packaging in the US is projected to advance 4.0 percent per year to $2.1 billion in 2018. Growth will be fueled by further recoveries in the manufacturing and construction sectors from post-recession troughs. Improved output of cosmetics, toiletries, and pharmaceuticals will support gains as these uses comprise three-fourths of tube and stick packaging demand. A turnaround in construction activity will benefit cartridges used to package cauks and sealants, which are widely used both in new construction and in maintenance and repair applications.

**Stick packs to grow the fastest**

Among major tube and stick packaging types, the fastest gains are expected for stick packs, with opportunities boosted by the further development of new applications and continued favorable prospects in several existing uses, such as condiments and pharmaceuticals. Growth will also be aided by advantages of product differentiation, portability, and material savings compared to conventional single-portion packaging types.

Squeeze tubes, which represented three-fifths of demand in 2013, are by far the largest tube and stick packaging product type. Demand for squeeze tubes is expected to increase at near the industry average annual rate through 2018. Beyond improved output in key markets, gains will be supported by greater use of value added decorative processes and advanced delivery systems that can protect and/or extend the shelf life of oxygen-sensitive contents. Unit-of-use tubes, which offer accurate dosing of pharmaceuticals and serve as sample or promotional packaging for cosmetics and toiletries, will also experience above average growth.

Laminate tubes will maintain their dominance in toothpaste packaging and will also gain ground in other cosmetic and toiletry applications and in pharmaceuticals at the expense of plastic and collapsible metal tubes. Moderating factors for squeeze tubes will include the maturity and commodity nature of toothpaste tubes, and marginal growth for collapsible metal tubes. Import competition in smaller-sized extruded plastic tubes from China, India, and other nations that offer lower-cost production will restrain value growth.

**Plastic to remain dominant material**

Plastic is the dominant tube and stick material based on its combination of favorable attributes, including light weight, relatively low cost, decorative capabilities, and barrier properties. Metal and paper will see ongoing use but will remain smaller players based on more limited applications.

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PRODUCTS

Cartridges
Cartridges are a type of tube and stick packaging with a narrow cylindrical body. These containers are combined with various dispensing tips and spouts and are used primarily in the packaging of semi-solid lubricants and greases. Products packaged in cartridges are dispensed with hand or powered applicator guns. Cartridges accounted for 12 percent of total tube and stick packaging demand in 2013.

Demand for cartridges is forecast to increase through 2018 by 4.4 percent annually to $260 million. Growth will outpace the overall tube and stick packaging average and will be based on a rebound in construction activity, with the residential, office, and commercial building markets all expected to recover from their post-recession troughs. Nonbuilding construction activity, though expected to rise more slowly than that in the 2008-2013 period, helped by a rebound in manufacturing output. An upswing in manufacturing will drive increased requirements for lubricants for industrial machinery and motor vehicle uses. Preventing faster growth will be competition from flexible packaging and squeeze tubes in caulks and adhesives. Sausage packs are a type of flexible packaging for caulks and sealants and are an alternative to cartridges. Sausage packs are used with refillable applicators and offer advantages of lower packaging and shipping costs, and reduced material use. Squeeze tubes of caulks and sealants are increasingly popular among do-it-yourselfers for small household repairs as they can be applied without the usage of a gun.

Growth for cartridges in adhesive and sealant applications is forecast to outpace gains in lubricant uses, with advances boosted by a rebound in building construction activity following several years of depressed levels. Design trends in new homes will also drive increased demand for cartridges in adhesive and sealant applications.

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<th>Item</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
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<td>289.0</td>
<td>365.0</td>
<td>462.0</td>
<td>625.0</td>
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<td>$ tubes &amp; sticks/000 $ pharma</td>
<td>1.1</td>
<td>1.2</td>
<td>1.1</td>
<td>1.1</td>
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<td>Pharmaceutical Tube &amp; Stick Demand</td>
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<td>Total Tube &amp; Stick Packaging Demand</td>
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Source: The Freedonia Group, Inc.
**COMPANY PROFILES**

**Unicep Packaging LLC**  
1702 Industrial Drive  
Sandpoint, ID 83864  
208-265-9696  
http://www.unicep.com

Annual Sales: $35 million (estimated)  
Employment: 200 (estimated)  
Key Products/Services: nonsterile, single-use tubes and tube filling

Unicep is a privately held company that specializes in the contract packaging of customer-supplied products. The Company's contract packaging business serves the cosmetic, medical, dental, pharmaceutical, veterinary, household, and industrial markets.

The Company is involved in the US tube and stick packaging industry through the manufacture of nonsterile, single-use contract packaging for gels, liquids, lotions, and emulsions used in the medical device, over-the-counter drug, personal care and cosmetics, and veterinary industries. Among Unicep’s production capabilities are blow-fill-seal and form-fill-seal manufacturing methods.

Blow-fill-seal products include unit-dose tubes in standard, TWIST-TIP, MICRODOSE, PRECISEDOSAGE, and SWABDOSE types. These products can be used for packaging medical devices, in-vitro diagnostic products, tooth whitening gels, lotion and skin cream, cosmetics, shampoos and conditioners, liquid soaps and detergents, topical medications, over-the-counter pharmaceuticals, and animal health products. Standard blow-fill-seal tubes are available in a wide range of custom mold sizes and shapes with fill capacities ranging from 0.02 to 0.68 ounces. These tubes are produced using low density polyethylene

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**TABLE III-2**

SQUEEZE TUBE DEMAND BY TYPE & MARKET  
(million dollars)

<table>
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<th>Item</th>
<th>2003</th>
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<td>Collapsible Metal</td>
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<td>By Market:</td>
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<td>Cosmetics &amp; Toiletries</td>
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<td>Pharmaceuticals</td>
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<td>Other</td>
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Source: The Freedonia Group, Inc.

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**STUDY COVERAGE**

*Tube & Stick Packaging* is a 230-page Freedonia industry study that presents historical demand data (2003, 2008, 2013) as well as projections (2018, 2023) by product and market. The study also considers market environment factors, details the industry structure, evaluates company market share and profiles 36 US industry competitors.
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Profiles industry players. This study analyzes the $7.5 billion US consumer product and medical and pharmaceutical segments, driven by expanded therapies are introduced into the marketplace. This study analyzes the 14.3 billion pound US plastic film industry, with forecasts for 2018 and 2023 by resin and market. The study also evaluates company market share and profiles industry participants.

### 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 emerging 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.

### 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 premixed 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.

### Pouches
Demand for pouches in the US is projected to increase 4.6 percent per year to $9.4 billion in 2018. Stand-up pouches will remain a major growth segment while flat pouches will remain dominant. Nonfood markets will outpace the dominant food and beverages segment, driven by expanded consumer product and medical and pharmaceutical applications. This study analyzes the $7.5 billion US pouches industry, with forecasts for 2018 and 2023 by type, feature, market, and production method. The study also evaluates company market share and profiles industry players.

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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 and other world markets. Industries analyzed by Freedonia include:

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- Construction & Building Products
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- Industrial Components
- Healthcare & Life Sciences
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