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Tube & Stick Packaging

US Industry Study with Forecasts for **2018 & 2023**

Study #3252 | January 2015 | $5200 | 230 pages

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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 caulks 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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Sample Text, Table & Chart

TABLE IV-12

PHARMACEUTICAL MARKET FOR TUBE & STICK PACKAGING (million dollars)

Item	2003	2008	2013	2018	2023
Pharmaceutical Shipments (bil $)					
$ tubes & sticks/000$ pharma					
Pharmaceutical Tube & Stick Demand					
Squeeze Tubes:					
Laminate Tubes					
Plastic Tubes					
Extruded Plastic Tubes					
Other Plastic Squeeze Tubes					
Collapsible Metal Tubes					
Stick Packs					
Other					
% pharmaceutical					
Total Tube & Stick Packaging Demand					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

PRODUCTS

Cartridges

Cartridges are a type of tube and stick packaging with a
cylindrical body. These containers are combined with variou
ing tips and spouts and are used primarily in the packaging o
semi-solid lubricants and greases. Products packaged in cart
dispensed with hand or powered applicator guns. Cartridges
for 12 percent of total tube and stick packaging demand in 20

Demand for cartridges is forecast to increase through 20
million. Growth will outpace the o
ge and will be based on a rebound
dential, office, and commercial buil
er from their post-recession troughs
hough expected to rise more slowly than that
will also recover from declines of the 2008-
r grease cartridges will grow slightly faster than
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 th
gun.

Growth for cartridges in adhesive and sealant applicatio
outpace gains in lubricant uses, with advances boosted by a r
building construction activity following several years of dec
levels. Design trends in new homes will also drive increased

SAMPLE TEXT

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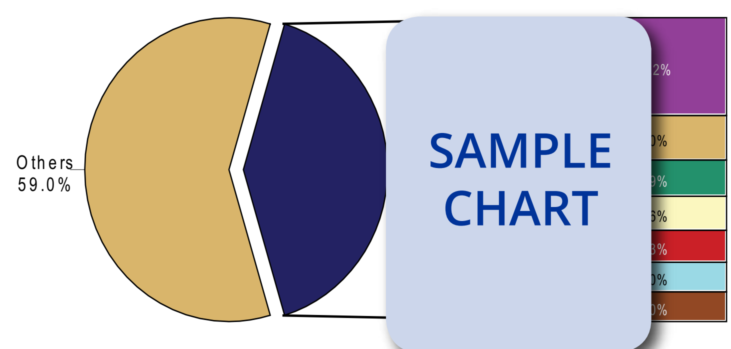
CHART V-1

US TUBE & STICK MARKET SHARE, 2013 ($1.7 billion)



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Sample Profile & Table, & Study Coverage

TABLE III-2

SQUEEZE TUBE DEMAND BY TYPE & MARKET
(million dollars)

Item	2003	2008	2013	2018	2023
Total Tube & Stick Packaging Demand					
% squeeze tubes					
Squeeze Tube Demand					
By Type:					
Laminate					
Plastic					
Collapsible Metal					
By Market:					
Cosmetics & Toiletries					
Pharmaceuticals					
Other					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

COMPANY PROFILES

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

Annual Sales:
Employment:

Key Products/S ube filling

Unicep is n the contract packaging of cus y's contract packaging business serves the cosmetic, medical, dental, pharmaceutical, veterinary, household, and industrial markets.

SAMPLE PROFILE

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, PRECISEDOSE, 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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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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Related Studies

World Caps & Closures

This study analyzes the world cap and closure industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by material (plastic, metal, rubber and cork), end-use market (e.g., beverages, food, pharmaceuticals), world regional market, and major national market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#3259 .... March 2015.................. $6500

Plastic Film

US demand for plastic film will grow 1.5 percent per year through 2018 to 15.4 billion pounds, valued at $24.9 billion. Linear low density polyethylene will remain the most common film resin and maintain solid growth, while polypropylene and other resins such as degradable types will outpace it from smaller bases. The food packaging market will exhibit the fastest gains. 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 players.

#3243 ....January 2015 .... $5300

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 prefillable 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.

#3193 .... July 2014.................... $5300

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.

#3157 ....April 2014 .... $5200

About The Freedonia Group

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