



CLICK TO VIEW

Table of Contents **2**

List of Tables &
Charts **3**

Study Overview **5**

Sample Text, Table
& Chart **6**

Sample Profile, Table &
Study Coverage **7**

Order Form & Corporate
Use License **8**

About Freedonia,
Custom Research,
Related Studies **9**

World Caps & Closures

Industry Study with Forecasts for **2019 & 2024**

Study #3259 | April 2015 | \$6500 | 464 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive
Cleveland, OH • 44143-2326 • USA
Toll Free US Tel: 800.927.5900 or
+1 440.684.9600
Fax: +1 440.646.0484
Email: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General.....	4
World Economic Overview.....	5
Recent Historical Trends.....	5
World Economic Outlook.....	6
World Demographic Outlook.....	9
Population.....	10
Urbanization Patterns.....	12
World Per Capita Gross Domestic Product..	13
World Personal Consumption	
& Expenditure Trends.....	15
World Consumer Nondurables Trends.....	19
Beverages.....	19
Food.....	21
Pharmaceuticals.....	24
World Packaging Outlook.....	26
Environmental & Regulatory Overview.....	30

OVERVIEW

Regional Overview.....	35
Materials Overview.....	38
Plastic.....	41
Metal.....	45
Rubber & Cork.....	48
Rubber.....	49
Cork.....	51
Market Overview.....	53
Beverages.....	55
Beer.....	57
Carbonated Soft Drinks.....	60
Bottled Water.....	63
Other Beverages.....	67
Fruit Beverages.....	68
Milk.....	69
RTD Tea & Coffee.....	70
Wine.....	71
Spirits.....	73
All Other.....	73
Food.....	75
Pharmaceuticals.....	77
Other Markets.....	81
Production Overview.....	85
International Trade Overview.....	87

NORTH AMERICA

General.....	90
Cap & Closure Supply & Demand.....	91
Cap & Closure Materials.....	95
Cap & Closure Markets.....	96
United States.....	97
Canada.....	107
Mexico.....	114

WESTERN EUROPE

General.....	123
Cap & Closure Supply & Demand.....	124
Cap & Closure Materials.....	128
Cap & Closure Markets.....	129
France.....	131
Germany.....	141
Italy.....	149
Netherlands.....	157
Portugal.....	165
Spain.....	172
United Kingdom.....	179
Other Western Europe.....	187

ASIA/PACIFIC

General.....	196
Cap & Closure Supply & Demand.....	197
Cap & Closure Materials.....	201
Cap & Closure Markets.....	202
Australia.....	203
China.....	211
India.....	221
Indonesia.....	230
Japan.....	239
South Korea.....	247
Other Asia/Pacific.....	254

OTHER REGIONS

Central & South America.....	264
General.....	264
Cap & Closure Supply & Demand.....	265
Cap & Closure Demand by Material.....	267
Cap & Closure Demand by Market.....	268
Brazil.....	270
Other Central & South America.....	278
Eastern Europe.....	286
General.....	286

Cap & Closure Supply & Demand.....	288
Cap & Closure Demand by Material.....	289
Cap & Closure Demand by Market.....	291
Russia.....	292
Other Eastern Europe.....	300
Africa/Mideast.....	309
General.....	309
Cap & Closure Supply & Demand.....	310
Cap & Closure Demand by Material.....	312
Cap & Closure Demand by Market.....	314
Cap & Closure Suppliers.....	316

INDUSTRY STRUCTURE

General.....	318
Market Share.....	321
Industry Restructuring.....	325
Cooperative Agreements.....	330
Marketing.....	332
Distribution.....	334
Manufacturing & Development.....	335
Integration Strategies.....	337

COMPANY PROFILES

Albéa Group.....	339
Alucaps Mexicana.....	341
Amcor Limited.....	343
AptarGroup Incorporated.....	347
BERICAP Holding.....	352
Berry Plastics.....	356
Corticeira Amorim.....	361
Crown Holdings.....	363
Dätwyler Holding.....	367
Georg MENSHEN GmbH.....	370
Global Closure Systems.....	372
Groupe Massilly.....	375
Guala Closures.....	377
Hangzhou Xinye Bottle Cap.....	380
Heineken NV.....	381
Mala Verschluss-Systeme.....	382
Manaksia Limited.....	383
MeadWestvaco Corporation.....	385
Nampak Limited.....	389
Nemera.....	392
Noël Group.....	393
Onex Corporation.....	395
Oricon Enterprises.....	397

(continued on following page)

Table of Contents

(continued from previous page)

Pelliconi & C. SpA	399
Phoenix Closures	401
Procap Luxembourg	402
Rexam plc.....	404
Reynolds Group	406
RPC Group	411
Saint-Gobain.....	413
Samhwa Crown & Closure	415
San Miguel Corporation	416
Scholle Corporation.....	418
Shanghai Zijiang Enterprise Group.....	420
Silgan Holdings.....	421
Tecnocap SpA	427
Tetra Laval International.....	429
TOKK Plant of Packaging Products	431
Toyo Seikan Group	432
Weener Plastik.....	434
West Pharmaceutical Services.....	436
Other Companies Mentioned in Study	440-464

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region	9
2 World Population by Region	11
3 World Urban Population by Region.....	13
4 World Per Capita Gross Domestic Product by Region.....	15
5 World Personal Consumption Expenditures by Region	18
6 World Beverage Manufacturing Value Added by Region	21
7 World Food Manufacturing Value Added by Region	23
8 World Pharmaceutical Shipments by Region.....	26
9 World Packaging Demand by Region	30

OVERVIEW

1 World Cap & Closure Demand by Region	36
Cht World Cap & Closure Demand by Region, 2014: Volume & Value	37
2 World Cap & Closure Demand by Material.....	40
Cht World Cap & Closure Demand by Material, 2014.....	41
3 World Plastic Cap & Closure Demand by Region	44
4 World Metal Cap & Closure Demand by Region	47
5 World Rubber & Cork Cap & Closure Demand by Region & Material	49
6 World Cap & Closure Demand by Market.....	54
Cht World Cap & Closure Demand by Market, 2014.....	55
7 World Beverage Cap & Closure Demand by Region	57
8 World Beer Cap & Closure Demand by Region	60
9 World Carbonated Soft Drink Cap & Closure Demand by Region	63
10 World Bottled Water Cap & Closure Demand by Region	66
11 World Other Beverage Cap & Closure Demand by Region	68
12 World Food Cap & Closure Demand.....	77
13 World Pharmaceuticals Cap & Closure Demand by Region	81
14 Other Markets for Cap & Closure Demand by Region	85
15 World Cap & Closure Production by Region	86
Cht World Cap & Closure Production by Region, 2014.....	87
16 World Cap & Closure Net Exports by Region	89

NORTH AMERICA

1 North America: Cap & Closure Supply & Demand	93
Cht North America Cap & Closure Demand by Country, 2014: Volume & Value ...	94
2 North America: Cap & Closure Demand by Material.....	96

3 North America: Cap & Closure Demand by Market.....	97
4 United States: Cap & Closure Supply & Demand	100
5 United States: Cap & Closure Demand by Material	102
6 United States: Cap & Closure Demand by Market.....	105
7 Canada: Cap & Closure Supply & Demand	109
8 Canada: Cap & Closure Demand by Material.....	111
9 Canada: Cap & Closure Demand by Market.....	113
10 Mexico: Cap & Closure Supply & Demand	117
11 Mexico: Cap & Closure Demand by Material.....	119
12 Mexico: Cap & Closure Demand by Market.....	120

WESTERN EUROPE

1 Western Europe: Cap & Closure Supply & Demand	126
Cht Western Europe Cap & Closure Demand by Country, 2014: Volume & Value.....	127
2 Western Europe: Cap & Closure Demand by Material.....	129
3 Western Europe: Cap & Closure Demand by Market.....	131
4 France: Cap & Closure Supply & Demand	135
5 France: Cap & Closure Demand by Material.....	137
6 France: Cap & Closure Demand by Market.....	139
7 Germany: Cap & Closure Supply & Demand	144
8 Germany: Cap & Closure Demand by Material.....	146
9 Germany: Cap & Closure Demand by Market.....	148
10 Italy: Cap & Closure Supply & Demand	152
11 Italy: Cap & Closure Demand by Material.....	154

(continued on following page)

List of Tables/Charts

(continued from previous page)

12 Italy: Cap & Closure	
Demand by Market.....	156
13 Netherlands: Cap & Closure	
Supply & Demand.....	160
14 Netherlands: Cap & Closure	
Demand by Material.....	162
15 Netherlands: Cap & Closure	
Demand by Market.....	164
16 Portugal: Cap & Closure	
Supply & Demand.....	168
17 Portugal: Cap & Closure	
Demand by Material.....	170
18 Portugal: Cap & Closure	
Demand by Market.....	171
19 Spain: Cap & Closure	
Supply & Demand.....	175
20 Spain: Cap & Closure	
Demand by Material.....	176
21 Spain: Cap & Closure	
Demand by Market.....	178
22 United Kingdom: Cap & Closure	
Supply & Demand.....	182
23 United Kingdom: Cap & Closure	
Demand by Material.....	184
24 United Kingdom: Cap & Closure	
Demand by Market.....	186
25 Other Western Europe: Cap &	
Closure Supply & Demand.....	190
26 Other Western Europe: Cap &	
Closure Demand by Material.....	192
27 Other Western Europe: Cap &	
Closure Demand by Market.....	193

ASIA/PACIFIC

1 Asia/Pacific: Cap & Closure	
Supply & Demand.....	199
Cht Asia/Pacific Cap & Closure Demand by	
Country, 2014: Volume & Value	200
2 Asia/Pacific: Cap & Closure	
Demand by Material.....	202
3 Asia/Pacific: Cap & Closure	
Demand by Market.....	203
4 Australia: Cap & Closure	
Supply & Demand.....	206

5 Australia: Cap & Closure	
Demand by Material.....	208
6 Australia: Cap & Closure	
Demand by Market.....	210
7 China: Cap & Closure	
Supply & Demand.....	214
8 China: Cap & Closure	
Demand by Material.....	216
9 China: Cap & Closure	
Demand by Market.....	219
10 India: Cap & Closure	
Supply & Demand.....	224
11 India: Cap & Closure	
Demand by Material.....	226
12 India: Cap & Closure	
Demand by Market.....	229
13 Indonesia: Cap & Closure	
Supply & Demand.....	234
14 Indonesia: Cap & Closure	
Demand by Material.....	236
15 Indonesia: Cap & Closure	
Demand by Market.....	238
16 Japan: Cap & Closure	
Supply & Demand.....	242
17 Japan: Cap & Closure	
Demand by Material.....	244
18 Japan: Cap & Closure	
Demand by Market.....	246
19 South Korea: Cap & Closure	
Supply & Demand.....	250
20 South Korea: Cap & Closure	
Demand by Material.....	251
21 South Korea: Cap & Closure	
Demand by Market.....	253
22 Other Asia/Pacific: Cap & Closure	
Supply & Demand.....	257
23 Other Asia/Pacific: Cap & Closure	
Demand by Material.....	259
24 Other Asia/Pacific: Cap & Closure	
Demand by Market.....	261

OTHER REGIONS

1 Central & South America: Cap &	
Closure Supply & Demand.....	267
2 Central & South America: Cap &	
Closure Demand by Material.....	268
3 Central & South America: Cap &	
Closure Demand by Market.....	269

4 Brazil: Cap & Closure	
Supply & Demand.....	273
5 Brazil: Cap & Closure	
Demand by Material.....	275
6 Brazil: Cap & Closure	
Demand by Market.....	277
7 Other Central & South America: Cap	
& Closure Supply & Demand.....	281
8 Other Central & South America: Cap	
& Closure Demand by Material.....	283
9 Other Central & South America: Cap	
& Closure Demand by Market.....	285
10 Eastern Europe: Cap & Closure	
Supply & Demand.....	289
11 Eastern Europe: Cap & Closure	
Demand by Material.....	290
12 Eastern Europe: Cap & Closure	
Demand by Market.....	292
13 Russia: Cap & Closure	
Supply & Demand.....	295
14 Russia: Cap & Closure	
Demand by Material.....	296
15 Russia: Cap & Closure	
Demand by Market.....	299
16 Other Eastern Europe: Cap &	
Closure Supply & Demand.....	303
17 Other Eastern Europe: Cap &	
Closure Demand by Material.....	305
18 Other Eastern Europe: Cap &	
Closure Demand by Market.....	307
19 Africa/Mideast: Cap & Closure	
Supply & Demand.....	312
20 Africa/Mideast: Cap & Closure	
Demand by Material.....	314
21 Africa/Mideast: Cap & Closure	
Demand by Market.....	316

INDUSTRY STRUCTURE

1 World Cap & Closure Sales	
by Company, 2014.....	320
Cht World Cap & Closure	
Market Share, 2014.....	322
2 Selected Acquisitions & Divestitures ..	328
3 Selected Cooperative Agreements	331

Despite low-cost commodity products dominating, market value growth will be driven by the growing use of more sophisticated closure products in packaging for pharmaceuticals and beauty care products.

World demand to rise 5.6% annually through 2019

World demand for caps and closures is projected to increase 5.6 percent per year to \$58 billion in 2019. In unit terms, demand is expected to rise 4.0 percent annually to 2.2 trillion. Although the majority of cap and closure demand in unit terms is for low-cost commodity types such as plastic screw caps and metal crowns, market value growth will be driven by the growing use of more sophisticated closure products in packaging for pharmaceuticals and beauty care products. While gains in the developing world will generally be faster than those in developed markets, growth opportunities will also exist in the large US and West European markets.

Bottled water to offer best beverage opportunities

Beverages account for nearly two-thirds of global cap and closure demand -- and a larger share than that in many national markets. Beer, carbonated soft drinks (CSD), and bottled water are the largest segments. While global beer production is advancing slowly and CSD consumption is declining in many areas, bottled water consumption will continue to increase in most parts of the world, primarily benefiting plastic caps used on PET bottles. The most established beverage categories -- such as milk and fruit juice -- will offer subpar growth opportunities, while newer beverage categories including ready-to-drink tea and coffee, sports drinks, and other

World Cap & Closure Demand (\$58 billion, 2019)



healthy beverage alternatives will lift overall demand for beverage closures.

Wine segment to be most dynamic market

While not among the world's largest markets for caps and closures, the wine segment is one of the most dynamic despite sluggish growth in global wine production. Once dominated by cork stoppers, the closure product mix for wine has diversified significantly in the past decade or two. Metal screw caps have become a leading option, particularly for white wines and wines that are intended for immediate consumption. Synthetic corks established a market presence as a lower-cost option to

natural corks, although this advantage was lost due to the subsequent development of lower-priced technical corks. Another key trend within the wine industry that is affecting closure demand is the increased volume of bulk wine trade, which is shifting where bottling activity occurs.

The food and pharmaceutical markets are smaller outlets for caps and closures than the beverage market, but both will offer above average growth opportunities. In the food market, value gains will be driven by growing use of dispensing caps and other higher priced closures. However, metal closures will retain an appreciable market presence due to their continued use with glass food containers.

Copyright 2015 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

WESTERN EUROPE

Italy: Cap & Closure Materials

Through 2019, Italy's cap and closure demand is expected to increase by 1.2 billion units. The increase in demand for food and beverages, such as bottled water and containers, will support demand for plastic types.

**SAMPLE
TEXT**

Plastic caps and closures comprised 75 percent of unit demand in Italy through the forecast period. Trends in the overall packaging industry, which will continue to favor plastic containers over glass and metal types, will benefit demand for plastic caps and closures as a matter of course. Growth in the use of bag-in-box and aseptic carton packaging in the country's important wine industry will provide further opportunities for plastic closures including higher value dispensing types.

Metal caps and closures will continue to lose market share to plastic products although metal will maintain its presence in some applications. Glass packaging, which is typically used in conjunction with metal closures, is still used for some beverages (e.g., beer, juices) and preserved foods (e.g., olives, sauces, preserved vegetables). Italy will continue to be a leading producer of glass packaging, which will benefit from glass' pristine and environmentally favorable image.

Italy is one of the world's largest wine producers, and this provides a substantial market for cork stoppers in the country. The country maintains a higher usage rate for cork than the global average despite cork losing market share continuously during the 2004-2014 period. Nevertheless, cork demand in Italy will continue to decline due to the weak outlook for wine production overall, the increasing export of wines, and the growing popularity of alternative containers and

Copyright 2015 The Freedonia Group, Inc.

TABLE VII-6

BRAZIL: CAP & CLOSURE DEMAND BY MARKET
(billion units)

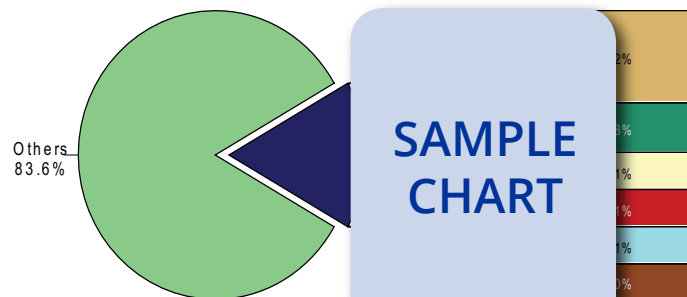
Item	2004	2009	2014	2019	2024
Cap & Closure Demand					
Beverages:					
Beer					
Carbonated Soft Drinks					
Bottled Water					
Other Beverages					
Food					
Pharmaceuticals					
Other Markets					

**SAMPLE
TABLE**

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD CAP & CLOSURE MARKET SHARE
(\$44.3 billion, 2014)



**SAMPLE
CHART**

Sample Profile & Table, & Study Coverage

TABLE VI-8
CHINA:
CAP & CLOSURE DEMAND BY MATERIAL

Item	2004	2009	2014	2019	2024
Asia/Pacific Caps & Closures (mil \$) % China					
Cap & Closure Demand (mil \$) cents/unit					
Cap & Closure Demand (bil units) Plastic					
Metal					
Rubber & Cork					

Source: The Freedonia Group, Inc.

COMPANY PROFILES

Oricon Enterprises Limited

1076 Dr. E. Moses Road
 Worli, Mumbai
 India
 91-22-2496-4000
<http://www.oricon.com>

Revenues: \$1 billion
 Geographic Regions: India 97% and
 Other Countries 3%
 Employment: 1,000
 Key Products: twist-off closures, roll-on pilfer-proof closures, and metal crowns; and plastic 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: Petrochemicals, Trading, Automobiles, Packaging, Shipping and Related Logistics, Liquid Colorants, and Others.

The Company participates in the world cap and closure industry through the Packaging segment, which had FY 2014 revenues of \$15 million. The segment includes the Oriental Containers Limited joint venture (India), which is 30-percent held by Oricon Enterprises and 70-percent owned by Navis Capital Partners Limited (Malaysia), a private equity firm. The joint venture manufactures metal and plastic closures, and tubes for beverage, food, and other applications.

Oriental Containers' metal closures encompass twist-off closures, roll-on pilfer-proof (ROPP) closures, and crowns. Twist-off closures are produced by the company under the SWAGESEAL brand name and consist of 53-, 63-, and 82-millimeter sizes. SWAGESEAL products



Related Studies

Beverage Containers

This study analyzes the US beverage container industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by material (e.g., plastic resins, metal, glass, paperboard) and market (e.g., carbonated soft drinks, bottled water, milk, fruit beverages, sports beverages, ready-to-drink tea, beer, wine, distilled spirits). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3297.....June 2015.....\$5300

World Cups & Lids

This study analyzes the world cup and lid industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (cups, lids), material (e.g., plastic, paperboard, metal, foil), market (e.g., foodservice, food and beverage packaging, retail), world region, and major country. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry competitors.

#3283.....June 2015.....\$6400

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

Caps & Closures

US demand for caps and closures will rise 4.0 percent per year to \$11.1 billion in 2018, with unit demand exceeding 300 billion. Plastic types will remain by far the dominant material, while other products such as elastomer and rubber stoppers will grow the fastest. Dispensing closures will lead gains based on their convenience and functionality benefits. This study analyzes the \$9.1 billion US cap and closure industry, with forecasts for 2018 and 2023 by raw material, product and market. The study also evaluates company market share and profiles industry players.

#3195.....August 2014.....\$5300

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

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 and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

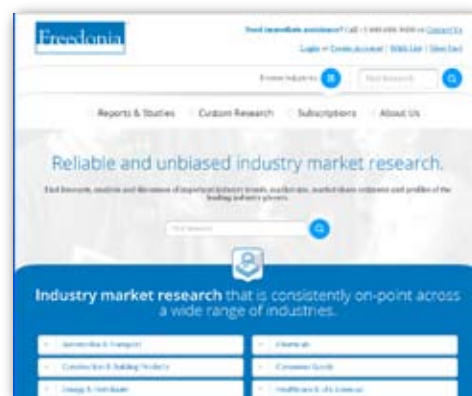
Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. 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.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](#)