

Caps & Closures

US Industry Study with Forecasts for 2020 & 2025

Study #3419 | June 2016 | \$5300



Dispensing, child-resistant and anti-tampering capabilities are driving positive growth in the cap and closure industry through 2020. Although efforts to streamline and lightweight packaging for many markets have significantly affected the cap and closure industry, these shifts toward less packaging waste have not offset the trends toward greater use of single-serve packaging and dispensing features, both of which have positive effects on demand.

Bottled water continues to generate growth

Bottled water will continue to be the largest part of the beverage market. Since nearly all packaged beverages require a closure, this will propel unit demand for both standard threaded caps and those with value-added dispensing capability. Sales in dollars, as opposed to units, continue to be held back by lightweighting and source reduction efforts. Pharmaceutical caps and closures will also post significant growth, due to continued gains in pharmaceutical shipments. Less promising markets include household and automotive chemicals, though the adoption of more sophisticated closures in these markets will help to bolster gains somewhat.

Plastic continues to dominate

Plastic caps and closures will continue to maintain the

largest share of demand, mostly because of the popularity of plastic containers in most markets. Formats such as stand-up pouches and gabletop cartons continue to make greater use of plastic threaded and dispensing caps to make contents easier to pour. Federal requirements stipulating the use of child-resistant closures (CRCs) will also bolster gains for plastic products as producers continue to introduce both senior-friendly and CRCs into the market, driving up the value as well as the unit demand. Metal closures will see increased use in wine, carbonated soft drinks and pharmaceuticals. However, weak production growth for beer will mitigate gains, especially as a greater proportion of beer is being packaged in cans.

Study coverage

This study analyzes the US cap and closure market. It presents historical demand data (2005, 2010, 2015) plus forecasts for 2020 and 2025 by product (e.g., threaded, unthreaded, dispensing, child-resistant, screw and lug, crowns, roll-ons, paperboard, elastomer and rubber) and market (e.g., beverages, pharmaceuticals, food, automotive chemicals, household cleaning chemicals, cosmetics and toiletries). The study also considers key market environment factors, evaluates company market share and profiles industry players such as Berry Plastics, AptarGroup, WestRock, Reynolds Group and Silgan Holdings.

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Demand for caps and closures employed in the wine and spirits market is forecast to reach 1.2 billion units by 2025, up from 1 billion units in 2016. This growth is driven by increases in wine consumption by the millennial generation, especially growth in organic wine and spirits. Spirits production is also growing, as well as bottled wine and moonshine.

Metal closures -- primarily roll-ons -- will log accelerated unit gains in the wine and spirits market based on rising usage with wine's growing acceptance among consumers. In the wine market, aluminum roll-ons are being increasingly employed as alternatives to natural synthetic corks, as these metal closures are not only free from TCA, they can also provide a stronger oxygen barrier than either natural or synthetic corks. The decreasing formality of wine drinking has led to strong trends favoring consumption of wine in nontraditional venues such as parks and at sports events and outdoor concerts will sustain growth for roll-on caps. Because single serving bottles use these caps extensively, trends favoring consumption of wine in nontraditional venues such as parks and at sports events and outdoor concerts will sustain growth for roll-on caps. Additionally, roll-on caps allow bottles to be opened and closed without the use of additional tools, a benefit for occasional wine drinkers. Linings for aluminum roll-on caps in the wine market are mainly made from SARANEX (Dow Chemical) barrier film.

For the spirits and other alcohol markets, growth for metal closures will be sustained by the interest in various flavored alcoholic beverages such as hard cider and hard soda that are growth niches within the

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This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

TABLE IV-3

BEVERAGE CAP & CLOSURE DEMAND BY APPLICATION & MATERIAL (million dollars)

Item	2005	2010	2015	2020	2025
Beverage Containers (bil units) % with closures					
Beverage Caps & Closures (bil units) cents/unit					
Beverage Cap & Closure Demand By Application:					
Water					
Carbonated Soft Drinks					
Fruit Beverages					
Wine & Spirits					
Milk					
Beer					
Other Beverages					
By Material:					
Plastic					
Metal					
Cork					

Source: The Freedonia Group

TABLE III-2

PLASTIC CAP & CLOSURE SUPPLY & DEMAND (million dollars)

Item	2005	2010	2015	2020	2025
Total Caps & Closures (bil units) % plastic					
Plastic Caps & Closures (bil units) cents/unit					
Plastic Cap & Closure Demand Threaded Dispensing Unthreaded Child-Resistant + net imports					
Plastic Cap & Closure Shipments					

Source: The Freedonia Group

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Related Studies

Pouches

Demand for pouches in the US will grow 4.4 percent annually through 2020 to \$10.1 billion. Growth will be driven by the introduction of pouch packaging into new markets and the integration of high value features, such as resealable closures and spouts, in more mature markets. Stand-up pouches will remain the fastest growing type. This study analyzes the \$8.2 billion US pouch market, with forecasts for 2020 and 2025 by product type, feature, market, and production method. The study also evaluates company market share and profiles industry players.

#3383..... February 2016 \$5400

Wine Packaging

Demand for wine packaging in the US will increase 4.4 percent annually to \$3.0 billion in 2019. Glass bottles will remain dominant but will face increasing competition from alternative formats and sizes, such as single-serving plastic bottles, aseptic cartons, aluminum cans, and cups and goblets, as well as bag-in-box packaging. This study analyzes the \$2.4 billion US wine packaging industry, with forecasts for 2019 and 2024 by container, closure, accessory and bulk packaging type. The study also evaluates company market share and profiles industry competitors.

#3308..... August 2015 \$5300

World Pharmaceutical Packaging

World demand for pharmaceutical packaging will rise 6.5 percent annually to over \$100 billion in 2019. The Africa/Mideast region will be the fastest growing market, followed by the Asia/Pacific region and Central and South America. Primary containers will remain the dominant segment, led by prefilled syringes and parenteral vials. This study analyzes the \$74 billion world drug packaging industry, with forecasts for 2019 and 2024 by product for six world regions and 16 major countries. The study also evaluates company market share and profiles industry players.

#3269..... July 2015 \$6700

Beverage Containers

US beverage container demand will grow 1.9 percent yearly to 283 billion units in 2019, valued at \$31.5 billion. Plastic will remain the dominant and fastest rising material, supported by greater consumption of bottled water, which will become the leading beverage container market by 2019. However, growth in plastic bottles will slow based on environmental concerns. This study analyzes the 258 billion unit US beverage container industry, with forecasts for 2019 and 2024 by material and market. The study also evaluates company market share and profiles industry players.

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

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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