

Cosmetic & Toiletry Containers in the US

US Industry Study with Forecasts for 2020 & 2025

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The cosmetics market will post the fastest gains through 2020, based in large part on the growth in the number of women who are over 15 years old and the higher percentage of minorities population, as minority women tend to use more cosmetic products. Gains for hair care and skin care products will be more moderate, due primarily to market maturity.

Plastic containers take market share from glass

Plastic containers have been gaining ground in a number of packaging markets over the past few decades as a result of the material's performance and price advantages over metal and glass. Advances in barrier capability and clarity have helped plastic containers gain share from glass in many cosmetic and toiletry markets as producers reduce packaging costs while keeping product formulations and brand identification intact.

Tubes, pouches & jars will register fastest plastic container growth

Of the major plastic container types, the fastest gains will be observed in tubes, pouches, and jars. Twist tubes and other rigid tubes will demonstrate good growth due to their extensive usage in the cosmetics market. Squeeze tubes will exhibit more applications in high-end lotions and cosmetics as consumers look for products that are easier to use and can be dispensed completely. Pouches are favored for product samples and claim some use in

commodity-type offerings, such as soap, and jars will see increased adoptions due to their versatility and good prospects for hair pomades, clays, and masques.

Glass will exhibit slight material advances

The outlook for metal containers will remain nearly flat as aerosol cans continue to face pressure from plastic spray bottles. Slow gains for paperboard packaging will be due to competition from plastic clamshells and reductions in secondary container use as many producers look for ways to reduce the environmental costs of packaging. Sustainability efforts have led to the elimination or reduction of secondary packaging in a number of markets, though it is still essential for brand identification or product protection in some applications. However, glass containers will see some gains through 2020 as a result of a good outlook for fragrances and nail cosmetics, plus the ability of glass to be associated with vintage product identities.

Study coverage

This study analyzes the US cosmetic and toiletry container market. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by container material (plastic, paperboard, metal, glass) and market (skin care, hair care, oral care, cosmetics, fragrances, deodorants and antiperspirants, shaving products, other). The study also considers key market environment factors, assesses the industry structure, and evaluates company market share.

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Industry Study with historical data for 2005, 2010 & 2015 plus forecasts for 2020 & 2025

PRODUCTS

Twist Tubes -- Demand for twist tubes in cosmetic and toiletry packaging applications is expected to increase by 1.5 million units per year from 2015 to 2025. Lip cosmetics tubes are seeing moderate growth due to their premium appearance and ease of application. Twist tubes are also common for brush applicators.

The preference for easy-to-apply and mess-free products has spurred demand for stick concealers and blushes. These products eliminate the mess of liquid foundation, but cover more smoothly than powders and require less blending. The rise of concealer and highlighting using makeup in 2014 also contributed to the popularity of stick foundations as they allow for very precise application and there is little danger of accidentally applying too much product. As concealer has become less popular, twist tubes have gotten a lift from their favoring a natural appearance by the introduction of lip balms and lipsticks in plastic twist tubes with colorful designs. Other applications for twist tubes are limited, but include solid fragrances and eye cosmetics.

Innovations in twist tubes are primarily related to aesthetics, with manufacturers working to make plastic tubes more appealing through interesting shapes and a high gloss finish. However, some innovations have occurred, such as Weckerle Cosmetics' introduction of its **One Handed Lipstick** in December 2014. Instead of a removable cap, the top of the tube opens when the tube is twisted to allow the stick to come through. This removes the need to uncap the tube and also eliminates the trouble of losing lipstick tubes in cosmetic bags or clutches. Other innovations include the offering of airtight tubes that extend the life of the product.

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TABLE IV-1

COSMETIC & TOILETRY CONTAINER DEMAND BY MATERIAL

Item	2005	2010	2015	2020	2025
Cosmetic & Toiletry Shpts (mil 2009\$) units/\$ C&T shpts					
Cosmetic/Toiletry Containers (mil units)					
Plastic					
Paperboard					
Metal					
Glass					
cents/unit					
Cosmetic & Toiletry Containers (mil \$)					
Plastic					
Paperboard					
Metal					
Glass					

Source: The Freedonia Group

TABLE V-11

HAIR SPRAY & RELATED CONTAINER DEMAND (million units)

Item	2005	2010	2015	2020	2025
Spray, Mousse, & Gel Containers					
By Material:					
Metal					
Plastic					
Bottles					
Tubes					
Other					
Paperboard & Glass					
By Type:					
Primary					
Secondary					
% hair spray & related Hair Care Container Demand					

Source: The Freedonia Group

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



Related Studies

Retail Ready Packaging

Retail ready packaging (RRP) is forecast to grow 5.2 percent annually to \$6.2 billion in 2020. Further growth for mass retailers and club stores will support gains, since such stores primarily sell merchandise directly from secondary packaging, which requires their vendors to ship RRP products. Corrugated boxes will provide the best opportunities for growth. The study presents historical demand data plus forecasts for 2020 and 2025 by product and market. This study also analyzes industry structure, evaluates company market share and profiles US industry competitors.

#3433..... July 2016 \$4900

World Flavors & Fragrances

Global demand for flavors and fragrances is forecast to grow 3.9 percent annually, reaching \$26.3 billion in 2020. Flavor blends will remain the largest segment, while essential oils and natural extracts will grow the fastest. The Asia/Pacific and Africa/Mideast regions will be the fastest growing markets. This study analyzes the \$21.7 billion market for world flavors and fragrances, with forecasts for 2020 and 2025 by product and market for six world regions and 20 major countries. The study also evaluates company market share and profiles industry participants.

#3397..... March 2016..... \$6300

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

World Corrugated Boxes

World demand for corrugated boxes is expected to increase 3.7 percent annually through 2019, to 260 billion square meters. Gains will be driven by strong growth in e-commerce and a sustainability advantage over plastic containers. The Asia/Pacific region will account for the largest share of net growth. This study analyzes the 217 billion square meter world corrugated box industry, with forecasts for 2019 and 2024 by raw material and market for six world regions and 27 major countries. The study also evaluates company market share and profiles industry players.

#3339..... November 2015 \$6400

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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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