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.
Contents Summary

Executive Summary

Market Environment

Key Trends
Demographic Effects on the Cosmetic & Toiletry Industry
Cosmetic & Toiletry Retail Channels
Beauty Sampling
Decorative Techniques
Value-Added Closures
Value-Added Components

Products
Plastic Containers
Plastic Bottles
Plastic Tubes
Other Plastic Containers
Paperboard Containers
Folding Cartons
Other Paperboard Containers
Metal Containers
Metal Cans & Bottles
Tubes & Other Metal Containers
Glass Containers
Glass Bottles
Jars & Other Glass Containers

Markets
Skin Care Products
Skin Care Products Outlook
Packaging Demand
Hair Care Products
Hair Care Products Outlook
Packaging Demand
Oral Care Products
Oral Care Products Outlook
Packaging Demand
Cosmetics
Cosmetics Products Outlook
Packaging Demand
Fragrances
Fragrance Products Outlook
Packaging Demand
Deodorants & Antiperspirants
Deodorant & Antiperspirant Products Outlook
Packaging Demand
Shaving Products
Shaving Products Outlook
Packaging Demand
Other Cosmetics & Toiletries

Industry Structure
Industry Composition
Market Share
Acquisitions & Divestitures
Marketing Strategies
Distribution
Manufacturing
Product Development
Competitive Strategies
Participating Companies

Tables & Charts

Executive Summary
1 Summary Table

Key Trends
1 Applicators Commonly Used with Cosmetic & Toiletry Containers
Ch: Distribution Channels for Beauty Products
Ch: Common Decorative Techniques & Processes
Ch: Value-Added Closure Demand by Product

Products
1 Cosmetic & Toiletry Container Demand by Material
Ch: Additional Factors Impacting the Cosmetic & Toiletry Container Industry
Ch: Cosmetic & Toiletry Container Demand by Material, 2015: Units & Value
2 Outlook for Plastic Cosmetic & Toiletry Containers by Type, 2015-2020
3 Plastic Cosmetic & Toiletry Container Demand by Type
Ch: Plastic Cosmetic & Toiletry Container Demand by Type, 2015
Ch: Advantages & Disadvantages of Plastic Bottles
Ch: Applications for Plastic Cosmetic & Toiletry Bottles
4 Plastic Cosmetic & Toiletry Bottle Demand by Market
Ch: Plastic Cosmetic & Toiletry Bottle Demand by Market, 2015
5 Plastic Cosmetic & Toiletry Bottle Demand by Resin
6 Advantages & Disadvantages of Selected Resins
7 Selected Producers of Plastic Bottles by Resin Offerings
Ch: Applications for Plastic Bottles by Resin Type
8 Plastic Cosmetic & Toiletry Tube Demand by Type
9 Plastic Cosmetic & Toiletry Tube Demand by Market
Ch: Plastic Cosmetic & Toiletry Tube Demand by Market, 2015
10 Plastic Cosmetic & Toiletry Squeeze Tube Demand by Type
Ch: Common Configurations & Features of Plastic Squeeze Tubes
11 Selected Producers & Product Offerings for Plastic Cosmetic & Toiletry Squeeze Tubes
12 Plastic Cosmetic & Toiletry Twist Tube Demand
13 Other Plastic Cosmetic & Toiletry Tube Demand
Ch: Characteristics & Features of Other Plastic Tubes by Cosmetic Type
14 Other Plastic Cosmetic & Toiletry Container Demand by Type & Market
Ch: Other Plastic Cosmetic & Toiletry Container Demand by Market, 2015
Ch: Characteristics & Advantages of Plastic Packaging
15 Selected Producers of Plastic Jars by Resin Product Offerings
16 Paperboard Cosmetic & Toiletry Container Demand by Type & Market
17 Outlook for Paperboard Cosmetic & Toiletry Containers by Market, 2015-2020
Ch: Advantages & Disadvantages of Paperboard Packaging
18 Selected Paperboard Container Producers & Product Offerings
Ch: Configurations & Decorative Options for Folding Cartons
19 Paperboard Cosmetic & Toiletry Folding Carton Demand by Market
Ch: Paperboard Cosmetic & Toiletry Folding Carton Demand by Market, 2005-2025
20 Other Paperboard Cosmetic & Toiletry Container Demand by Type
Ch: Features & Characteristics of Set-up Boxes
21 Outlook for Metal Cosmetic & Toiletry Containers by Market, 2015-2020
Ch: Advantages & Disadvantages of Metal Containers
22 Metal Cosmetic & Toiletry Container Demand by Type & Market
23 Selected Metal Container Producers & Product Offerings
24 Metal Cosmetic & Toiletry Can & Bottle Demand by Material & Market
Ch: Metal Cosmetic & Toiletry Can & Bottle Demand by Market, 2015
25 Outlook for Glass Cosmetic & Toiletry Containers by Market, 2015-2020
Ch: Advantages & Disadvantages of Glass Containers
26 Glass Cosmetic & Toiletry Container Demand by Type & Market
27 Glass Cosmetic & Toiletry Bottle Demand
28 Other Glass Cosmetic & Toiletry Container Demand

Markets
1 Cosmetic & Toiletry Container Demand by Market & Type
Ch: Primary & Secondary Container Use by Market, 2015
Ch: Cosmetic & Toiletry Container Demand by Market, 2015
2 Skin Care Product Shipments
3 Skin Care Container Demand by Application
Ch: Skin Care Packaging Demand by Application, 2015
4 Soap Container Demand
5 Cream & Lotion Container Demand
Ch: Comparative Advantages of Squeeze Tubes & Plastic Bottles
6 Cleanser Container Demand
7 Hair Care Product Shipments
8 Hair Care Product Container Demand by Application
Ch: Hair Care Product Container Demand by Application, 2015
9 Shampoo & Conditioner Container Demand
10 Hair Color Container Demand
11 Hair Spray & Related Container Demand
12 Other Hair Care Applications by Product
13 Other Hair Care Container Demand
14 Oral Care Product Shipments
15 Oral Care Product Container Demand by Application
16 Toothpaste Container Demand
17 Selected Mouthwash & Other Oral Care Containers by Application
18 Mouthwash & Other Oral Care Product Container Demand
19 Cosmetics Shipments
20 Cosmetics Container Demand by Application
Ch: Cosmetics Container Demand by Application, 2005-2025
21 Selected Producers & Cosmetic Container Offerings
22 Lip Preparation Container Demand
23 Eye Cosmetics Container Demand
24 Nail Preparation Container Demand
25 Facial & Other Cosmetic Preparation Container Demand
26 Fragrance Product Shipments
27 Fragrance Product Container Demand
28 Deodorant & Antiperspirant Product Shipments
29 Deodorant & Antiperspirant Container Demand
30 Shaving Product Shipments
31 Shaving Product Container Demand
32 Other Cosmetic & Toiletry Container Demand

Industry Structure
1 US Cosmetic & Toiletry Sales by Company, 2015
Ch: US Cosmetic & Toiletry Container Market Share, 2015
2 Market Leaders by Product
3 Selected Acquisitions & Divestitures
Demand for twist tubes in cosmetic and toiletry packaging applications is forecast to climb 1.9 percent per year to 545 million units in 2020. Gains will be driven by increases in demand for lip cosmetics tubes. Moderating gains will be competition from other tubes. Squeeze tubes are seeing greater use for all cosmetics due to their premium appearance and ability to dispense viscous products evenly through the use of an applicator. Other rigid tubes with wand or brush applicators are also common.

The preference for beauty products that are easy to apply and mess-free 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 contouring 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 contouring has become less popular, twist tubes have gotten a lift from trends favoring a natural appearance by the introduction of lip balms and tints 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 innovation has 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.

### TABLE IV-1

<table>
<thead>
<tr>
<th>Item</th>
<th>2005</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cosmetic &amp; Toiletry Shpts (mil 2009$) units/$ C&amp;T shpts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cosmetic/Toiletry Containers (mil units)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plastic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paperboard</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Glass</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>cents/unit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cosmetic &amp; Toiletry Containers (mil $)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plastic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paperboard</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Glass</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group

### TABLE V-11

<table>
<thead>
<tr>
<th>Item</th>
<th>2005</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spray, Mousse, &amp; Gel Containers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Material:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Metal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plastic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bottles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tubes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paperboard &amp; Glass</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>By Type:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Primary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Secondary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% hair spray &amp; related</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hair Care Container Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

For complete details on any study visit www.freedoniagroup.com
The Freedonia Group 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

The Freedonia Group is a division of MarketResearch.com

About MarketResearch.com

With offices in London, New York City, and Washington D.C., MarketResearch.com is the leading provider of global market intelligence products and services. With research reports from more than 720 top consulting and advisory firms, MarketResearch.com offers instant online access to the world's most extensive database of expert insights on industries, companies, products, and trends.