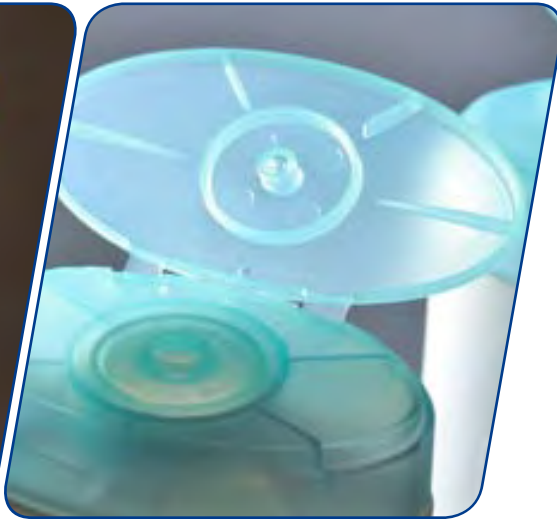
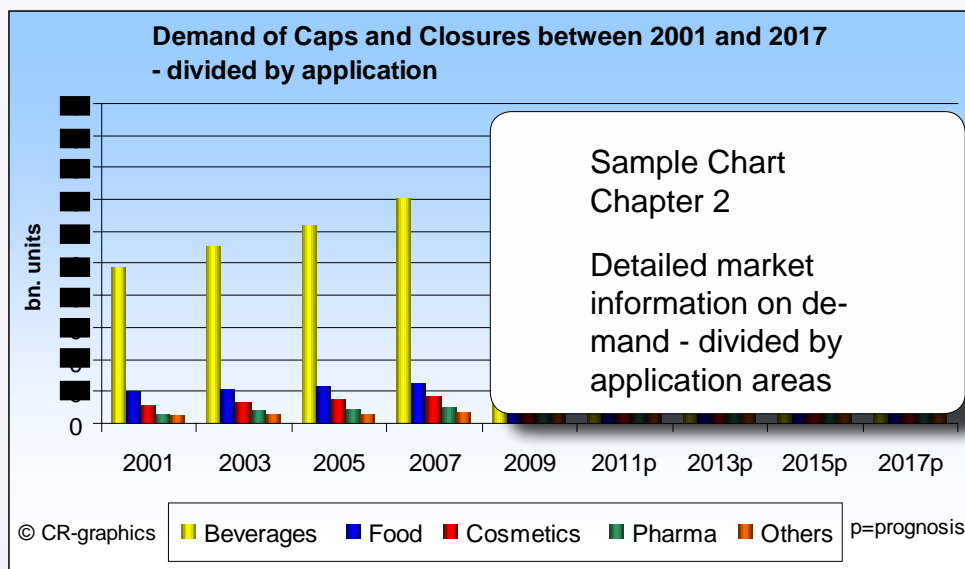


# Market Study: Plastic Caps and Closures



**Ceresana  
Research**

# Market Study: Plastic Caps and Closures



## Small Closures, Large Market Opportunities

Ceresana has taken the European plastic closure market under the magnifying glass. Push-Pull, Twist-Top, Snip-Tip, or rather Toggle-Swing? The selection of caps and closures is not usually straightforward, and new varieties are constantly being developed. Although inexpensive and standard products are being applied in many sectors, the trend towards more complex closure systems remains unbroken. Above all, more functionality, better technical characteristics, and convenience are in demand, in addition to weight reduction and energy saving during production and recycling.

## Market Worth Billions

Synthetic wine corks, spray pumps, caps for deodorant rollers, caps for tubes, and other closures are typically only small parts, but are altogether a noticeable growth market: More than 200 billion plastic closures were sold throughout Europe in the past year, 60 billion more than at the start of the decade. Ceresana Research expects to see continuous growth at an average rate of 2.3 percent per year until 2017. Revenue from

plastic closures in Europe will consequently increase from 1.7 billion Euro to more than 2 billion Euro per year.

Manufacturers of caps and closures, as well as producers of the corresponding machines and suppliers of plastics and additives will primarily profit from an increased use of plastic packaging for foods and drinks. Polypropylene and polyethylene are being used increasingly for closures. Significant growth can especially be seen in certain sub-segments of the beverage sector, such as beer, yogurt, milk products, and sports drinks.

## Regional Differences

Production and consumption of plastic caps and closures is seeing the strongest growth in Russia, Poland, and Turkey. Manufacturers in Eastern Europe are investing above all in mass production of standardized products, such as screw-caps for PET bottles. In contrast, producers in Western Europe are concentrating, for example, on complex closure systems with seals and built-in dosing devices for medications. Optical characteristics, such as transparency and gloss, especially play an important role in packaging for cosmetics.

## The Study in Brief:

### Chapter 1

Volume I presents concise information on the most important varieties of closure types: advantages, application possibilities, legal situations, disposal, and recycling.

### Chapter 2

Presentation and analysis of the closure market – including prognoses until 2017. Consumption, production, imports, exports, and revenue are analyzed. In addition, the report offers a comprehensive insight into market dynamics, innovations, and trends.

### Chapter 3

31 European countries are analyzed in detail: valuable data and influential factors on demand development. Demand according to application, is also explained and described in detail.

### Chapter 4

Volume II serves as a useful index of manufacturers with profiles for 379 companies from 35 countries: Comprehensive information on product portfolios and locations. The company profiles are clearly arranged according to contact information, key figures, production facilities, company structure, and current news.

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**1 Basics**

**1.1 Introduction**

Caps and closures are an important part of bottles, canisters, cans, as well as stand... purpose is to allow for the opening and clo... many cases. The importance of plastic is in... it is replacing traditional materials, such... Plastics offer cost and environmental advan... improve quality and safety, and create new...

**Vol. I / Chapter 1**

All important, fundamental information regarding plastic caps – compiled overview

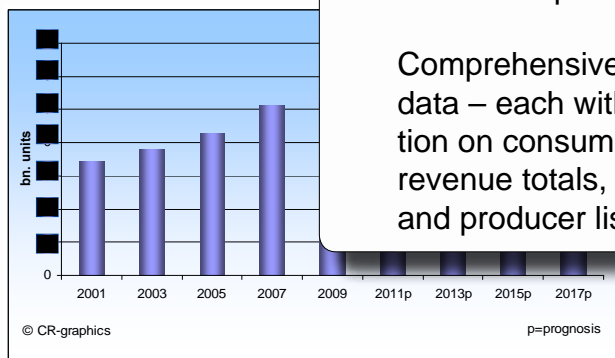
The study at hand examines the European market for caps and closures. It covers only products which have a relatively short service life and are often combined with single-use or disposable products. This primarily includes:

- Screw-caps for canisters and bottles
- Plastic caps for tumblers, containers, supply cans, and barrels
- Closures for cosmetics (Jars and deodorant rollers)
- Closures for packaging of hygiene products (for example, toothpaste tubes, shampoo bottles)
- Spray pumps for perfumes, pharmaceutical products or household cleaners
- Plastic caps for aerosol cans (for example, hair spray)
- Plugs and synthetic corks for wine bottles

The most important types of plastic closures are explained in closer detail in the subsequent section 1.2. Their application areas, which are analyzed in chapter 3, include beverages, foodstuffs, cosmetics, and pharmaceuticals, among others. Section 1.2 also covers additional functions, such as preservation of freshness and oxygen barriers. Requirements pertaining to child safety and food contact are covered in section 1.3.

**2.12.2 Production, Imports, and Exports - Germany**

Production of caps and closures increased at an average rate of X% annually during the past eight years, reaching a volume of X billion units in 2009 (Graph). As a result, Germany accounted for roughly X% of European production. An annual increase of X% and a volume of X billion units...



**Vol. I / Chapter 2**

Comprehensive market data – each with information on consumption and revenue totals, production, and producer lists.

Graph: Production of caps and closures in Germany between 2001 and 2017

Company	Food & Beverage				Personal Care				Pharma / Healthcare	Chemicals	Household products	Others
	Carton (dairy / juice)	Nutrition packaging	Bottle	Alcoholic beverage	Aerosol	Fragrance	Cosmetic	Others				
Aero Pump GmbH							x		x			
Aerosol-Technik Lindal GmbH		x			x						x	Building Materials
...												
Weener Plastik AG		x	x				x		x		x	

Table: German producer of caps and closures and their applications

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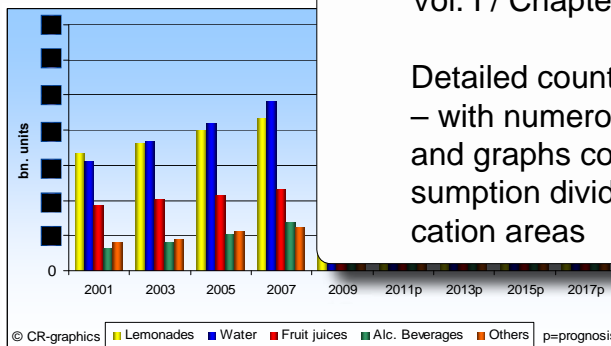
3 Market Data Applications\*

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- \*lemonades, water, fruit juice, beer, dairy, wine, mixed drinks, energy and sport drinks, carbonated beverages, beverages with caffeine
- sauces, packaging for food services, edible oils, baby food
- deodorant rollers, shampoo bottles, aerosol cans
- chemicals, household detergents, pet food, containers, barrels

3.1.1 Beverages - Europe

Market volume of caps and closures for beverages amounted to X billion units during 2009 – an annual growth of X% since 2001. The most important market within the beverage industry was that of bottled water (Graph). Market share totaled roughly X% in 2009, followed by lemonades (X%), fruit juices (X%), alcoholic beverages (X%), and other beverages (X%).



Graph: Demand of caps and closures for beverages between 2001 and 2017, divided by subsector

Since the manufacturers of closures profit from the beverage industry's comparatively minimal dependence on economic fluctuations, we anticipate seeing stable market growth in this sector throughout nearly all European countries. Demand is expected to grow at an average annual rate of X%, resulting in a market volume of just less than X billion units in 2017. With a share of X%, Germany was the largest market for beverage caps in 2009 (Table). Russia achieved a market share of X%, followed by Italy (X%), the United Kingdom (X%), France (X%), and Spain (X%).

Vol. I / Chapter 3

Detailed country analyses – with numerous tables and graphs covering consumption divided by application areas

3.2.2 Russia - Applications

Of the just less than X billion units consumed in Russia during 2009, caps and closures used for beverages accounted for approximately X% (Table). Food reached a share of X%, followed by cosmetics (X%), pharmaceuticals (X%), and other applications (X%).

Demand in bn. units	2001	2003	2005	2007	2009	2011p	2013p	2015p	2017p
Lemonades	X	X	X	X	X	X	X	X	X
Water	X	X	X	X	X	X	X	X	X
Fruit juice	X	X	X	X	X	X	X	X	X
Alc. beverage	X	X	X	X	X	X	X	X	X
other beverages	X	X	X	X	X	X	X	X	X
<b>Beverage</b>	X	X	X	X	X	X	X	X	X
<b>Food</b>	X	X	X	X	X	X	X	X	X
<b>Cosmetics</b>	X	X	X	X	X	X	X	X	X
<b>Pharma</b>	X	X	X	X	X	X	X	X	X
<b>Others</b>	X	X	X	X	X	X	X	X	X
<b>Total</b>	X	X	X	X	X	X	X	X	X

Table: Demand of caps and closures in Russia between 2001 and 2017, divided by applications

Beverages

Caps and closures for alcoholic beverages were the largest market within the beverage sector. Of the X billion units consumed in 2009, this branch accounted for roughly X%. Fruit juices came in second place with X%, followed by lemonades (X%), water (X%), and other beverages (X%). While consumption of caps and closures for all beverages grew at an average rate of X% per year between 2001 and

Vol. I / Chapter 3

Concise market data for C&C applications – structured according 31 European countries

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This buyers guide lists all large manufacturers and niche suppliers. These include among others: Alpa-Werke Alwin Lehner, Amcor, Closure Systems International, ColepCCL, Global Closure Systems, Greiner Packaging, Guala Closures Group, Huhtamäki, LINPAC Group, Mead-Westvaco, Procap Holding, Promens, Qualipac, Rexam, RPC Group, Seaquist Closures, SIG Combibloc Group, Silgan White Cap, Tetra Pak International.

<b>4.10 France</b>	
<b>Global Closure Systems Group</b>	
220, Bureaux de la Colline; 1, Rue Royale	
Saint-Cloud, 92213	
France	
Tel.	33 1 78 76 44 00
Fax	33 1 78 76 44 25
Web	www.gcs.com
E-mail	gcsmarketing.network@gcs.cc
Divisions, Product range	The company is divided into three business units: <ul style="list-style-type: none"> <li>• Beverage closures: Plastic closures and metal crowns for carbonated and non-carbonated beverage applications.</li> <li>• Specialty closures: Closure systems for the non-carbonated beverage, food, household, pharmaceutical, cosmetic, wine, and spirit industries.</li> <li>• Asia-Pacific: Products from the beverage closure business unit as well as from the specialty closures business unit.</li> </ul>
Production sites	The company operates production sites throughout Europe (19 plants), the USA (3 plants), Russia, Mexico, Thailand, the Philippines, Malaysia, China, and Singapore (1 plant each).
Profile Summary	Global Closure Systems Group was established in 2005 through the incorporation of Astra Plastique S.A.S., Bender GmbH, Massmould Ltd., Obrist Closures Switzerland GmbH, United Closures & Plastics Zeller Ltd., and Zeller Plastik Deutschland GmbH as six separate branded divisions. Global Closure Systems Group is owned by funds managed by PAI partners (France) while being a former subsidiary of

Vol. II / Chapter 4  
 Extensive company profiles for 379 manufacturers – with key figures, product ranges, production facilities, cooperations, and news

<b>Plastic Processes / Polymers</b>	
Plastics Processes	<input type="checkbox"/> Injection Blow Molding <input checked="" type="checkbox"/> Injection <input type="checkbox"/> Extrusion Blow Molding <input type="checkbox"/> Thermo-forming
Polymers	<input checked="" type="checkbox"/> PP <input checked="" type="checkbox"/> PE <input type="checkbox"/> LDPE <input type="checkbox"/> PA <input type="checkbox"/> PS <input type="checkbox"/> EPS <input type="checkbox"/> EVA <input type="checkbox"/> TPE / TPU <input type="checkbox"/> GFK / CFK/NFK
<b>Caps and Closures</b>	
Application	<input checked="" type="checkbox"/> Food & Beverage <input type="checkbox"/> Carton (diary / juice) <input checked="" type="checkbox"/> Nutrition packing <input type="checkbox"/> Bottle <input checked="" type="checkbox"/> Alcoholic beverage <input type="checkbox"/> Aerosol <input type="checkbox"/> Fragrance <input type="checkbox"/> Cosmetic <input checked="" type="checkbox"/> others <input type="checkbox"/> Chemicals <input checked="" type="checkbox"/> Household <input type="checkbox"/> others <input type="checkbox"/> others
Grades, Applications, Machinery, Innovation	Through its subsidiaries the Global Closure Systems Group offers a multitude of features for its caps and closures. Recent product innovations from the company include an all plastic trigger pump, integrated valve systems for closures, snap-hinge closures, a child-proof closure, sequentially moulded tamper evident closures, as well as an snap-on closure made of PP.

Vol. II / Chapter 4  
 Plastic Processes, Grades and application for closures, as well as types of caps, machinery, and innovations

## The study is particularly suitable for

- Manufacturers, retailers and distributors of standard-, disk-top-, push-pull-, screw caps, trigger pumps, tamper evident and customized closures, lids and caps, synthetic corks, dispensers as well as hinged lids
- Suppliers of feedstocks: plastic resins and additives
- Users of caps and closures: Producers of beverages, food, cosmetics, pharma, and industrial packaging
- Engineering and machine builder
- Investors and analysts
- Organizations and authorities
- Associations and institutes

## 12 reasons to order now

- Get the most extensive overview of the markets
- Find current prognoses for single application areas until 2017
- Gain an objective and detailed analysis of factors which influence your business
- Recognize opportunities on time
- Be informed about research, innovations and technology trends
- Use data for Europe and single countries
- Be timely informed of M&A
- Use reliable information (e.g. turnover, volumes) for a successful business plan
- Gain a detailed description of closures: performance, usage and requirements

- Learn about the most important product lines and applications
- Analyze technical product characteristics
- Be up to date with the most important manufacturers through a multitude of company profiles

## Decision maker benefit

- Business Management
- Engineering / Production
- Strategic Planning
- Research and Development
- Marketing / Market Research
- Sales
- Purchasing
- Import / Export

## Up-to-date Market Studies from Ceresana Research

(More Infos: Click covers)



### Plasticisers

69 Products; 145 Producers; 273 Pages, 19 Graphs, 18 Tables; 08/05



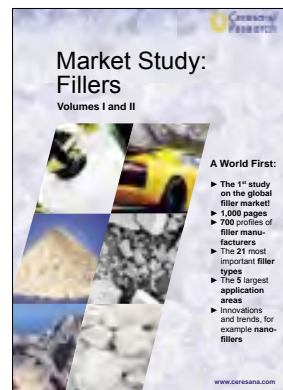
### Solvents

77 Products; 270 Producers; 452 Pages, 80 Graphs, 8 Tables; 01/06



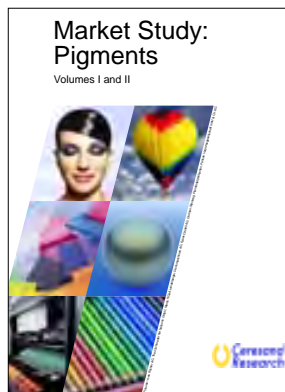
### Flame Retardants

44 Products; 241 Producers; 627 Pages, 82 Graphs, 33 Tables; 07/06



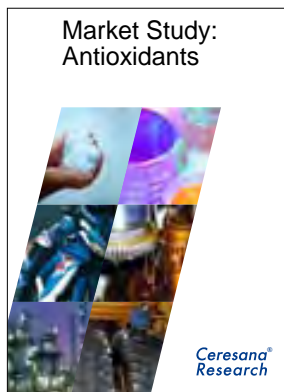
### Fillers

21 Products; 702 Producers; 2 Vol., 1,074 P., 88 Graphs, 28 Tables; 07/07



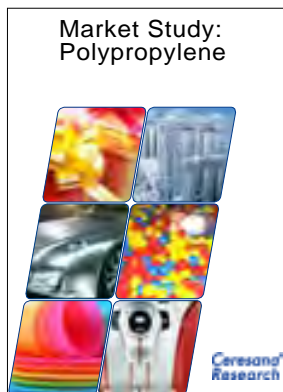
### Pigments

300 Products; 250 Producers; 2 Vol., 1,154 P., 53 Graphs, 56 Tables; 12/07



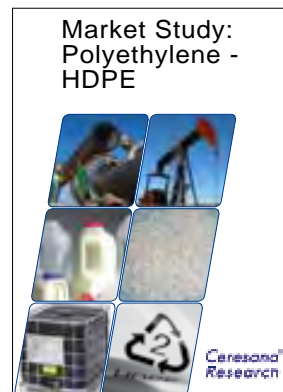
### Antioxidants

90 Products; 68 Producers; 505 Pages, 53 Graphs, 3 Tables; 04/08



### Polypropylene

64 Countries; 101 Producers; 2 Vol., 1,030 P., 313 Graphs, 118 Tables; 06/08



### Polyethylene - HDPE

65 Countries, 100 Producers; 2 Vol., 994 P., 285 Graphs, 99 Tables; 09/08

## About Ceresana Research

We are one of the world's leading market research institutions.

In addition to multi-client studies, we also offer commissioned studies according to an individual client's specifications. Our core competencies include:

- chemicals
- plastics
- additives
- commodities
- industrial components
- packaging
- construction materials

Companies, institutions, and associations from more than 45 countries have already profited from our global market data and prognoses.

## Profit from our Studies

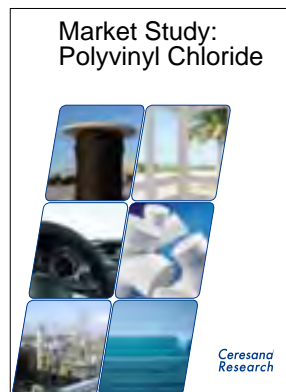
- Comprehensive information and objective analyses for an enduring competitive edge
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- Strategic, recommended courses of action
- Reduce company risks
- Learn about changes: Take action now instead of having to react
- Optimize purchasing, production, technology, and communication
- Improve competitiveness and company success
- Assess future and already completed R&D Projects
- Powerful arguments for the application of capital
- Objective data for publications and press releases

## Testimonials

- „Your study is very useful for us, because this is the first one which gives comprehensive data and facts about the „bioplastic industry“ . So let's say it is the starting point and the „reference“ today “ (Sales Director, Biosphere)
- „Very detailed study about each country, that I like most. Overall a very good and comprehensive report.“ (Corporate, ISIN International)
- „Charts and Graphs were clear and pertinent.“ (Chemical Engineer, Roquette Frères)
- „The market study covers all application segments of antioxidants: Plastics, Rubber, Lubricants and Fuels.“ (Sales SBU Organics, Duslo)
- „A comprehensive work covering Pigments with easy to find manufacturers and suppliers“ (President, Harold-Scholz)
- „clear and easy to understand. Findings were clearly laid out.“ (F-TT, IGP Pulvertchnik)
- „Ceresana has created a very useful study“ (Head of Department, Chemical-Physical Laboratories)
- „Informative, all-encompassing, I am satisfied.“ (TM, Thor GmbH)
- „very well arranged“ (Dr JS, Quarzwerke GmbH)
- „Everything at a glance.“ (Dr SS, Pelikan)
- „Contents were/ are useful.“ (Liaison & Logistics Officer, National Chemicals B.V.)

## Up-to-date Market Studies from Ceresana Research

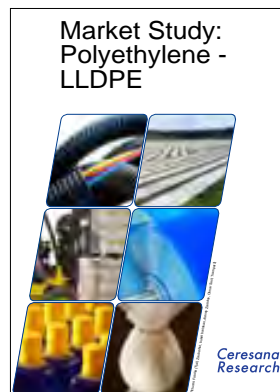
(Soon to come: Ethylene and Adhesives...)



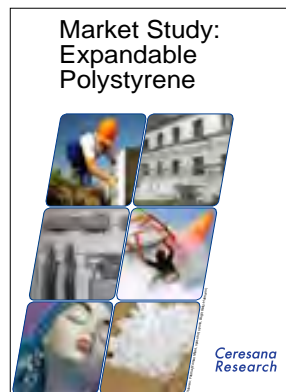
**Polyvinyl Chloride**  
61 Countries, 122 Producers; 2 Vol., 977 P., 364 Graphs, 108 Tables; 11/08



**Bioplastics**  
7 Countries; 12 Products, 77 Producers; 400 P., 80 Graphs, 32 Tables; 06/09



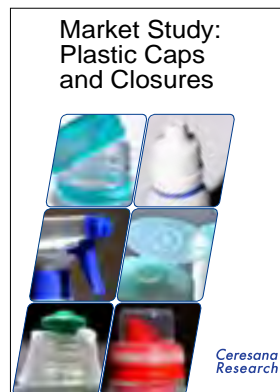
**Polyethylene - LLDPE**  
67 Countries, 80 Producers; 2 Vol., 830 P., 305 Graphs, 100 Tables; 03/10



**Expandable Polystyrene**  
64 Countries, 63 Producers; 2 Vol., 690 P., 287 Graphs, 87 Tables; 03/10



**Polyethylene - LDPE**  
67 Countries, 87 Producers; 2 Vol., 850 P., 300 Graphs, 100 Tables; 04/10



**Plastic Caps**  
31 Countries, 379 Producers; 2 Vol., 1,100 P., 139 Graphs, 72 Tables; 09/10

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| <input type="checkbox"/> Ethylene                               | <input type="checkbox"/> Polyethylene - HDPE (2 <sup>nd</sup> ed.) |   |

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**3) Edition** (Content is identical)

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