

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom
Research, Related Studies,
Corporate Use License 8](#)



photo courtesy of Bericap

World Caps & Closures

Industry Study with Forecasts for **2011 & 2016**

Study #2211 | July 2007 | \$5500 | 329 pages



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

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
Recent Economic Performance	5
World Economic Outlook.....	7
World Demographic Outlook.....	10
World Population Outlook	11
World Urban Population Outlook	12
World Consumer Nondurables	
Trends	13
Beverages	14
Food	16
Pharmaceuticals.....	19
World Packaging Outlook.....	21
Environmental & Regulatory	
Overview.....	23

MARKET OVERVIEW

Geographic Overview	27
Per Capita Consumption Trends.....	29
Materials	33
Plastics.....	35
Metal	39
Cork	43
Markets	46
Beer.....	48
Carbonated Soft Drinks.....	49
Bottled Water	52
Other Beverages.....	53
Food	55
Pharmaceuticals.....	56
Other	57
International Trade	60

NORTH AMERICA

General	63
United States	68
Canada	78
Mexico	84

WESTERN EUROPE

General	92
France.....	100
Germany.....	108
Italy	115
Netherlands	122
Portugal	126
Spain	130
United Kingdom.....	135
Other Western Europe	142

ASIA/PACIFIC

General	148
Australia.....	154
China	160
India	168
Japan.....	174
South Korea	181
Other Asia/Pacific	185

OTHER REGIONS

Latin America.....	192
Brazil.....	196
Other Latin America.....	202
Eastern Europe	208
Russia	212
Other Eastern Europe	219
Africa/Mideast.....	225

INDUSTRY STRUCTURE

General	231
Market Share	233
Market Leaders	234
AptarGroup	234
Global Closure Systems.....	235
Alcoa	235
Owens-Illionis	236
Silgan Holdings	236
Rexam	236
Mergers & Acquisitions.....	237
Marketing	241
Cooperative Agreements.....	242

COMPANY PROFILES

Alcan Incorporated	248
Alcoa Incorporated.....	252
Alucaps Mexicana.....	255
Amcor Limited.....	257
AptarGroup Incorporated.....	259
BERICAP Holding	264
Berry Plastics	266
ContinentalAFA Dispensing	269
Corticeira Amorim	270
Crown Holdings	272
Daetwyler Holding.....	275
Fomento Economico Mexicano	277
Global Closure Systems	278
Groupe Massilly.....	281
Grup Vemsa 1857	282
Grupo Modelo	284
Guala Closures	285
Hangzhou Xinye Bottle Cap.....	286
InBev NV/SA	287
Industrias Innopack	288
Manaksia Group	289
MeadWestvaco Corporation	290
Nampak Limited.....	293
Owens-Illinois Group	295
Pelliconi & C.	297
Phoenix Closures	298
Plasticum Group.....	300
Portola Packaging	301
Rexam plc.....	304
Royal Ten Cate.....	307
Saint-Gobain	308
Samhwa Crown & Closure.....	310
San Miguel.....	311
Silgan Holdings	312
Tecnocap SpA	314
Tetra Laval International	316
TOKK Plant of Packaging Products....	318
Toyo Seikan Kaisha.....	319
West Pharmaceutical Services.....	321
Other Companies Mentioned	
in Study.....	324

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table..... 3

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region .. 10
 2 World Population by Region 12
 3 World Urban Population by Region 13
 4 World Food & Beverage Manufacturing Value Added by Region 19

MARKET OVERVIEW

1 World Cap & Closure Demand by Region ... 29
 Cht Per Capita Cap & Closure Demand/Per Capita Food & Beverage Manufacturing Value Added Relationship 32
 2 World Cap & Closure Demand by Material.. 35
 3 World Plastic Cap & Closure Demand by Region 39
 4 World Metal Cap & Closure Demand by Region 42
 5 World Cork Cap & Closure Demand by Region 45
 6 World Cap & Closure Demand by Market.... 47
 Cht World Cap & Closure Demand by Market, 2006 47
 7 Trade Flows in Caps & Closures 62

NORTH AMERICA

1 North America -- Cap & Closure Shipments & Sales 65
 2 North America -- Cap & Closure Sales by Material & Market 66
 Cht North America -- Cap & Closure Demand by Country, 2006: Value vs. Volume..... 67
 3 United States -- Cap & Closure Shipments & Sales 71
 4 United States -- Cap & Closure Sales by Material & Market 72
 5 Canada -- Cap & Closure Shipments & Sales 80
 6 Canada -- Cap & Closure Sales by Material & Market 81
 7 Mexico -- Cap & Closure Shipments & Sales 86
 8 Mexico -- Cap & Closure Sales by Material & Market 88

WESTERN EUROPE

1 Western Europe -- Cap & Closure Shipments & Sales 94

2 Western Europe -- Cap & Closure Sales by Material & Market 96
 Cht Western Europe -- Cap & Closure Demand by Country, 2006: Value Versus Volume 97
 3 France -- Cap & Closure Shipments & Sales 102
 4 France -- Cap & Closure Sales by Material & Market 104
 5 Germany -- Cap & Closure Shipments & Sales 110
 6 Germany -- Cap & Closure Sales by Material & Market 112
 7 Italy -- Cap & Closure Shipments & Sales 117
 8 Italy -- Cap & Closure Sales by Material & Market 118
 9 Netherlands -- Cap & Closure Shipments & Sales 123
 10 Netherlands -- Cap & Closure Sales by Material & Market 124
 11 Portugal -- Cap & Closure Shipments & Sales 128
 12 Portugal -- Cap & Closure Sales by Material & Market 129
 13 Spain -- Cap & Closure Shipments & Sales 132
 14 Spain -- Cap & Closure Sales by Material & Market 133
 15 United Kingdom -- Cap & Closure Shipments & Sales 137
 16 United Kingdom -- Cap & Closure Sales by Material & Market 138
 17 Other Western Europe -- Cap & Closure Shipments & Sales 143
 18 Other Western Europe -- Cap & Closure Sales by Material & Market 145

ASIA/PACIFIC

1 Asia/Pacific -- Cap & Closure Shipments & Sales 151
 2 Asia/Pacific -- Cap & Closure Sales by Material & Market 152
 Cht Asia/Pacific -- Cap & Closure Demand by Country, 2006: Value vs. Volume.... 153
 3 Australia -- Cap & Closure Shipments & Sales 155
 4 Australia -- Cap & Closure Sales by Material & Market 156
 5 China -- Cap & Closure Shipments & Sales 162
 6 China -- Cap & Closure Sales by Material & Market 164

7 India -- Cap & Closure Shipments & Sales 170
 8 India -- Cap & Closure Sales by Material & Market 171
 9 Japan -- Cap & Closure Shipments & Sales 176
 10 Japan -- Cap & Closure Sales by Material & Market 178
 11 South Korea -- Cap & Closure Shipments & Sales 183
 12 South Korea -- Cap & Closure Sales by Material & Market 184
 13 Other Asia/Pacific -- Cap & Closure Shipments & Sales 187
 14 Other Asia/Pacific -- Cap & Closure Sales by Material & Market 188

OTHER REGIONS

1 Latin America -- Cap & Closure Shipments & Sales 194
 2 Latin America -- Cap & Closure Sales by Material & Market 195
 3 Brazil -- Cap & Closure Shipments & Sales 197
 4 Brazil -- Cap & Closure Sales by Material & Market 198
 5 Other Latin America -- Cap & Closure Shipments & Sales 204
 6 Other Latin America -- Cap & Closure Sales by Material & Market 205
 7 Eastern Europe -- Cap & Closure Shipments & Sales 210
 8 Eastern Europe -- Cap & Closure Sales by Material & Market 212
 9 Russia -- Cap & Closure Shipments & Sales 215
 10 Russia -- Cap & Closure Sales by Material & Market 216
 11 Other Eastern Europe -- Cap & Closure Shipments & Sales 221
 12 Other Eastern Europe -- Cap & Closure Sales by Material & Market 222
 13 Africa/Mideast -- Cap & Closure Shipments & Sales 228
 14 Africa/Mideast -- Cap & Closure Sales by Material & Market 230

INDUSTRY STRUCTURE

Cht World Cap & Closure Market Share, 2006 234
 1 Selected Acquisitions & Divestitures..... 238
 2 Selected Cooperative Agreements..... 244

Unit gains will continue to be driven by the penetration of closure-intensive plastic packaging into traditionally closureless types such as gabletop and aseptic drink cartons and plastic pouches.

World demand to rise 4.7% annually through 2011

Global demand for caps and closures is forecast to expand 4.7 percent per year through 2011 to \$32 billion, representing 1.4 trillion units. Accelerating economic growth and rising personal incomes will support development of consumer nondurable goods markets, especially in the world's emerging economies, with closures and other packaging materials among the primary beneficiaries.

Unit gains will continue to be driven by the penetration of closure-intensive plastic packaging at the expense of traditionally closureless packaging media such as gabletop and aseptic drink cartons and plastic pouches. Limiting growth will be heightened competition from packaging formats that do not use closures, such as blister packs and stand-up pouches.

Sales revenues will be fueled by a shift in the product mix in favor of value-added closure types that provide increased product safety, user convenience and/or shelf appeal. Examples include tamper-evident, child-resistant and dispensing types.

China, India to perform strongly in unit gains

Above-average gains are expected in the world's emerging markets, especially those in Asia. China will lead the way, accounting for over one-fourth of projected unit gains in global cap and

World Cap & Closure Demand (\$25.3 billion, 2006)



closure demand through 2011. However, due to relatively low prices, it will account for only 16 percent of value gains. India will also perform strongly. The US, which accounts for almost one-fourth of global cap and closure value demand, also enjoys generally favorable prospects (fueled by a continued shift in the product mix toward value-added configurations). Western Europe and Japan will see slower growth, hindered by mature markets and stagnant population growth.

Plastic to continue supplanting metal, cork

Plastic closures will continue to supplant traditional metal and (increasingly) cork types, supported by technological

advances and the ongoing shift from glass to plastic and paperboard in consumer packaging applications such as soft drinks and pharmaceuticals. Beverages will remain the dominant market for caps and closures, accounting for almost 65 percent of unit demand in 2011. In the beverage sector, strongest gains are expected in the bottled water segment, with nontraditional products such as sports drinks and flavored milk also performing favorably. Healthy growth is also anticipated in consumer chemical markets such as cosmetics, toiletries and household cleaners, which are enjoying rapid growth and becoming more intensive users of packaging in the developing world.

[Click here to purchase online](#)

Sample Text, Table & Chart

ASIA/PACIFIC

India: Markets -- Demand for caps and closures in India register strong gains in virtually all markets, with soft drinks being the most important category and accounting for 35 percent in 2011 demand. Demand prospects among all sectors in 2003 through 2005. Soft drink sales in India declined as a result of the ban on plastic bottles, leading allegedly improper use by Coca-Cola. Excessive groundwater usage in some areas of India has also been a concern. However, from 2000-2002, carbonated soft drink sales grew at an annual pace of close to 25 percent -- portending a bright future growth if these concerns are resolved.

SAMPLE TEXT

Relative to the world average, gains in cap and closure sales in India will be particularly pronounced in the pharmaceutical sector. The country bolsters its position as a leading exporter of drugs. A number of local companies, such as Cipla, Dr. Reddy's Laboratories and Ranbaxy Laboratories, have become globally renowned. Indian generic drug manufacturers now produce low-cost AIDS drugs for over 50 percent of the 1,000,000 or so HIV patients taking antiretroviral medicines in developing countries, bolstering the domestic market for pharmaceutical packaging products (albeit of the low-cost variety).

A new bill passed by India's parliament in early 2005 will make it illegal for local firms to make generic copies of patented drugs. However, this will be countered by increasing foreign investment (in production and research and development activities) in the pharmaceutical sector on the part of the world's leading drug companies. In addition, the new bill does not ban certain generic products, including AIDS-related drugs.

Copyright 2007 The Freedonia Group, Inc.

TABLE VI-8

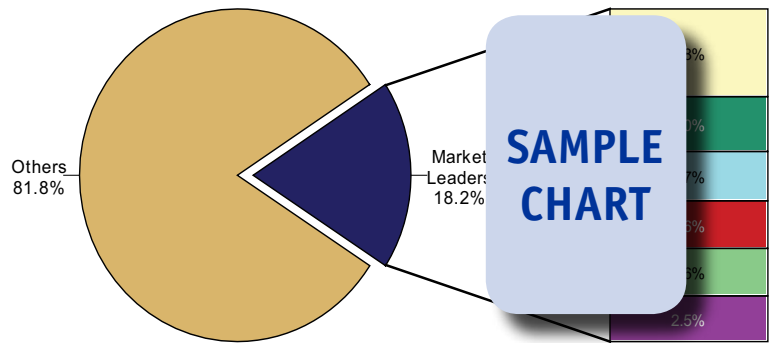
INDIA -- CAP & CLOSURE SALES BY MATERIAL & MARKET (million units)

Item	1996	2001	2006	2011	2016
Cap & Closure Sales (mil \$)	170	380	550	850	1290
cents/unit	0.9	1.3	1.4	1.5	1.6
Cap & Closure Sales	100	200	300	450	650
By Material:					
Plastic*	60	120	180	270	390
Metal	40	80	120	180	270
By Market:					
Beverages:					
Beer	10	20	30	45	65
Carbonated Soft Drinks	50	100	150	225	325
Bottled Water	10	20	30	45	65
Other	10	20	30	45	65
Food	10	20	30	45	65
Pharmaceuticals	10	20	30	45	65
Other	10	20	30	45	65

SAMPLE TABLE

CHART VIII-1

WORLD CAP & CLOSURE MARKET SHARE, 2006 (\$25.3 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-7
INDIA -- CAP & CLOSURE SHIPMENTS & SALES

Item	1996	2001	2006	2011	2016
Population (million persons)					273
\$ GDP per capita					30
Gross Domestic Product (bil 2005\$)					100
% food & bev					14
Food & Bev Value-Added (bil 2005\$)					14
\$ C&C/capita					1.0
\$ C&C/000\$ GDP					18
\$ C&C/000\$ food & bev					2.5
Cap & Closure Sales (mil \$)					90
net exports					70
Cap & Closure Shipments (mil \$)					1220

COMPANY PROFILES

Pelliconi & C. SpA
 Via Emilia 314
 40064 Ozzano Emilia ITALY
 39-51-651-2611
<http://www.pelliconi.com>

Sales: \$
 Employ:

Key Pro
 pilfer-pr

Pel
 crowns ;
 ery used



aluminum roll-on
 uction of bottle
 also makes machin-

The Company's closures include bottle crowns, plastic closures and aluminum roll-on pilfer-proof (ROPP) closures. Pelliconi has the capacity to manufacture over 30 billion metal and plastic bottle caps annually. Among the Company's standard range of bottle crowns are 26 millimeter (mm) and 29 mm designs. Pelliconi produces 26-mm crowns in twist dry blend, pry-off dry blend and pry-off PLASTISOL varieties. In addition to its standard line of 26-mm bottle crowns, the Company manufactures promotional 26-mm crowns with removable polyvinyl chloride (PVC) and PVC-free liners; promotional crowns with ink jet printing; and TWIST SOFT TOUCH 26-mm crowns, which are designed to enhance user comfort when the crown is gripped and turned. Pelliconi's 29-mm crowns include pry-off models for champagne and water bottles.

Among Pelliconi's plastic closures are two-piece high density polyethylene caps, including STRETCH LOK products. Other plastic

"Demand for caps and closures in India totaled \$550 million in 2006. Despite its vast population, the market for packaged goods in India is relatively small. In addition, a majority of caps and closures are of the low-cost metal type used in carbonated beverages. Nevertheless, a continuing strong and sustained economic expansion through 2011 will result in the market for caps and closures in India growing a strong 9.1 percent per year to \$850 million. The country's trade deficit will contract moderately to ..."
 --Section VI, pg. 169

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or + 1 440.684.9600

FAX: + 1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2300, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM

F-WEB.2211

World Caps & Closures..... \$5500

Corporate Use License (add to study price) * + \$2300

Additional Print Copies @ \$500 each *

Total (including selected option) \$

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

Credit Card #

Expiration MM YY

Signature

Name

Title

Company

Division

Street (No PO Box please)

City/State/Zip

Country

Phone Fax

Email

* Please check appropriate option and sign below to order an electronic version of the study.

Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature

Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2300; one additional user, add \$400; two additional users, add \$800; three additional users, add \$1200.

Signature

OTHER STUDIES

Active & Intelligent Packaging

US demand for active and intelligent packaging will grow 13% yearly through 2011. Intelligent packaging will grow the fastest, driven by the emergence of lower cost time-temperature indicator (TTI) labels. Active packaging will be paced by gas scavengers. Pharmaceuticals, beverages and food will offer the best market prospects. This study analyzes the US active and intelligent packaging industry, with forecasts for 2011 and 2016 by product and market. It also details market share and profiles major players.
 #2236 08/2007..... \$4400

Food Containers: Rigid & Flexible

US food container demand will reach \$23.5 billion in 2011. Growth trends include heightened demand for more convenient foods and a shift toward value-added packaging. Plastic containers, and bags and pouches will log the fastest growth. Meat and dairy products and frozen specialties will lead gains by market. This study analyzes the 263 billion unit US food container industry, with forecasts given for 2011 and 2016 by product and market. It also evaluates company market share and profiles major players.
 #2208 07/2007..... \$4500

Beverage Containers in China

Demand for beverage containers in China will grow 8.9% per annum through 2010. Plastic will remain the dominant material in unit terms while paperboard will grow the fastest. Milk will stay the largest market and be one of the fastest growing, with fruit beverages posting the fastest gains. This study analyzes the ¥60.5 billion beverage container industry in China, with forecasts for 2010 and 2015 by market and material. The study also evaluates company market share and profiles leading industry participants.
 #2183 05/2007..... \$4900

Cups & Lids

US cup and lid demand will grow 4.3% annually through 2010, driven by a favorable outlook for key foodservice markets (e.g., quick service restaurants, coffee shops). Lids will outpace cups based on an increasing percentage of drinking cups using lids, growing demand for higher-value specialty lids and continued gains for single-serving packaging cups. This study analyzes the \$5.5 billion US cup and lid industry to 2010 and 2015 by product and market. It also details market share and profiles major players
 #2154 01/2007..... \$4300

Dairy Packaging

US demand for dairy packaging will grow 4.1% annually through 2010. Gains will be driven by trends toward smaller containers and more food eaten or prepared away from home. Best growth is expected in cultured dairy products such as drinkable yogurt and in cream. Pouches and bottles will present the best opportunities by product. This study analyzes the \$3.5 billion US dairy packaging industry to 2010 and 2015 by application, product and material. It also details market share and profiles major players.
 #2105 10/2006..... \$4400

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, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[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](http://www.freedoniagroup.com)