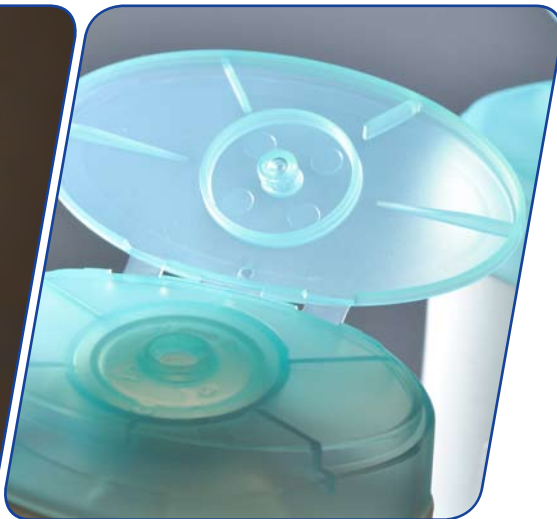


# Market Study:

## Plastic Caps & Closures -

### Europe (2<sup>nd</sup> ed.)



## Dear decision-makers,

Nowadays, information is available in overwhelming amounts. But what is the best way to find the crucial data?

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Oliver Kutsch, CEO



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- Deal with future markets

Push-Pull, Twist-Top, Snip-Tip, or Toggle-Swing? The selection of caps and closures is hardly straightforward nowadays, and new varieties for beverages, cosmetics, and other goods are constantly being developed. Ceresana analyzed the European market for plastic caps and closures already for the second time. Simple standard screw caps are still sold most frequently, however, caps and closures with an increased functionality gain importance in individual application areas. The analysts of Ceresana expect demand for plastic caps and closures in Europe to increase at an average growth rate of 2.0% p.a. until 2024.

## Stand-Up Pouches with Closures

Plastic caps and closures increasingly capture the market for flexible packaging. Stand-up pouches are light, handy, save raw materials, and can be designed and printed versatily. At the beginning, they were lacking practical pouring facility and they could not be re-closed. By now, numerous suitable spout stand-up pouches with integrated and resealable spouts are available for liquids, viscous materials, creams, and other applications. Due to the small size of these closures, manufacturers already have to meet different requirements than for traditional bottle caps.

## Light and Handy

Suppliers of plastic caps and closures profit substantially from an increasing use of rigid packaging made of plas-

tics, of PET-based disposable bottles in particular. Important growth factors are the rising demand for bottled water as well as the increasing consumption of smaller packages. More complex closures such as dispenser systems or tamper-proof caps are used more often. Rigid containers and tubes made of plastics significantly gain importance in the food, cosmetics, and pharmaceutical industries. Often, this increase occurs at the expense of glass or metal containers: Plastic containers are usually combined with a plastic closure. Rigid plastic containers are increasingly used for beer, liquid food such as sauces or spreads, or particularly for ready-made meals for on-the-go consumption.

## Smart Eye-Catchers

The trend towards "intelligent" packaging also captures caps and closures. For example, the company Water.IO offers closures for water bottles which help consumers adhere to a healthy and regular water consumption with light or vibration signals. The visual presentation on the shop shelf becomes more and more important as well since the level of competition is on the rise. A simple way to differentiate oneself from other competitors is a plastic closure with marble look, which is produced by RPC Zeller Plastik. Closures that serve as unique selling point and can - often subconsciously - be a factor in purchasing decision for consumers are increasingly created.

## The Study in Brief:

Chapter 1: Presentation and analysis of the European market for caps and closures - including forecasts until 2024. Demand, production, as well as import and export are evaluated.

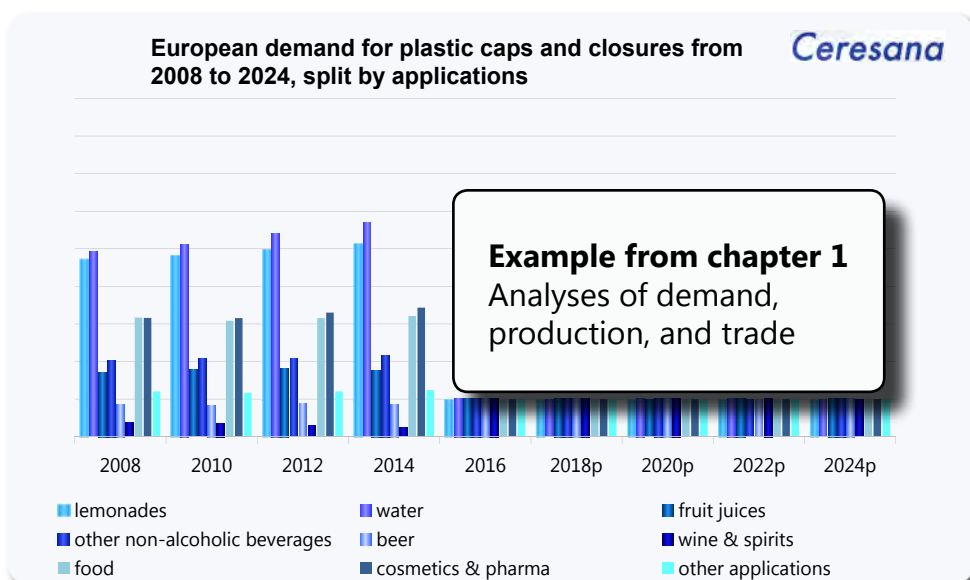
Chapter 2 examines the demand for plastic caps and closures for 21 European countries in detail. The following 9 application areas are taken into consideration:

- Lemonades
- Water
- Juices
- Other non-alcoholic beverages
- Beer
- Wine & Spirits
- Food
- Cosmetics & Pharma
- Other applications (i.a. household chemicals)

Chapter 3 provides company profiles of the largest manufacturers of plastic caps and closures - clearly arranged according to contact details, revenues, profit, product range, production sites, and profile summary. Extensive profiles of 79 manufacturers are given, including Alpla-Werke, Berry, Coveris, Dart Container, Greif, Guillin, Reynolds, and Tetra Laval.

## 1 Market Data

- 1.1 Europe
  - 1.1.1 Demand
  - 1.1.2 Production
- 1.2 Austria
  - 1.2.1 Demand
  - 1.2.2 Production & Trade
- 1.3 Belgium
  - 1.3.1 Demand
  - 1.3.2 Production & Trade
- 1.4 Bulgaria
  - 1.4.1 Demand
  - 1.4.2 Production & Trade
- 1.5 Czechia
  - 1.5.1 Demand
  - 1.5.2 Production & Trade
- 1.6 Finland
  - 1.6.1 Demand
  - 1.6.2 Production & Trade
- 1.7 France
  - 1.7.1 Demand
  - 1.7.2 Production & Trade
- 1.8 Germany
  - 1.8.1 Demand
  - 1.8.2 Production & Trade
- 1.9 Greece
  - 1.9.1 Demand
  - 1.9.2 Production & Trade
- 1.10 Hungary
  - 1.10.1 Demand
  - 1.10.2 Production & Trade
- 1.11 Italy
  - 1.11.1 Demand
  - 1.11.2 Production & Trade
- 1.12 Lithuania
  - 1.12.1 Demand
  - 1.12.2 Production & Trade
- 1.13 Poland
  - 1.13.1 Demand
  - 1.13.2 Production & Trade
- 1.14 Portugal
  - 1.14.1 Demand
  - 1.14.2 Production & Trade
- 1.15 Romania
  - 1.15.1 Demand
  - 1.15.2 Production & Trade
- 1.16 Russia
  - 1.16.1 Demand
  - 1.16.2 Production & Trade



- 1.17 Slovakia
  - 1.17.1 Demand
  - 1.17.2 Production & Trade
- 1.18 Spain
  - 1.18.1 Demand
  - 1.18.2 Production & Trade
- 1.19 Sweden
  - 1.19.1 Demand
  - 1.19.2 Production & Trade
- 1.20 The Netherlands
  - 1.20.1 Demand
  - 1.20.2 Production & Trade
- 1.21 Turkey
  - 1.21.1 Demand
  - 1.21.2 Production & Trade
- 1.22 United Kingdom
  - 1.22.1 Demand
  - 1.22.2 Production & Trade
- 1.23 Other Europe
  - 1.25.1 Demand
  - 1.25.2 Production & Trade

## 3 Company Profiles

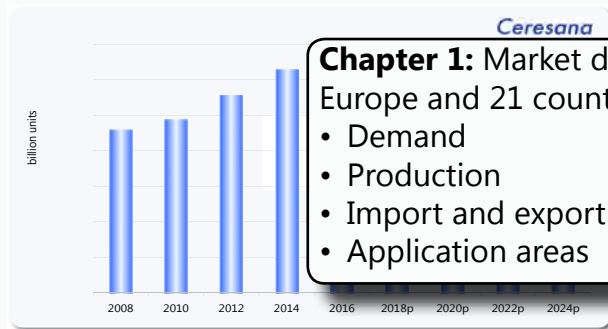
- Austria (3 Producers)
- Belgium (4)
- Bulgaria (1)
- Czechia (1)
- Denmark (1)
- Finland (2)
- France (6)
- Germany (18)
- Italy (15)
- Luxembourg (2)
- Norway (1)
- Portugal (2)
- Slovenia (1)
- Spain (3)
- Sweden (2)
- Switzerland (5)
- The Netherlands (5)
- Turkey (1)
- United Kingdom (6)

## 2 Applications

- 2.1 Lemonades
- 2.2 Water
- 2.3 Fruit juices
- 2.4 Other non-alcoholic beverages
- 2.5 Beer
- 2.6 Wine & spirits
- 2.7 Food
- 2.8 Cosmetics & pharma
- 2.9 Other applications

1.2.2 Production and Trade - Belgium

Around X billion plastic caps and closures were produced in Belgium in 2016. Production volume is projected to increase by X% p.a. to approx. X billion units in 2024.



Graph: Production of plastic caps and closures in Belgium from 2008 to 2024

Company
xxx
xxx
xxx
xxx

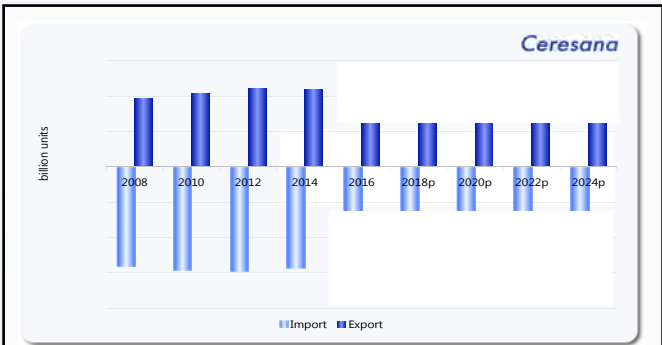
Table: Important manufacturers of plastic caps and closures in Belgium

Import and Export

In the past, Belgium was a net importer. In 2016, about X billion units were exported, while X billion units were imported.

**Chapter 1: Market data for Europe and 21 countries:**

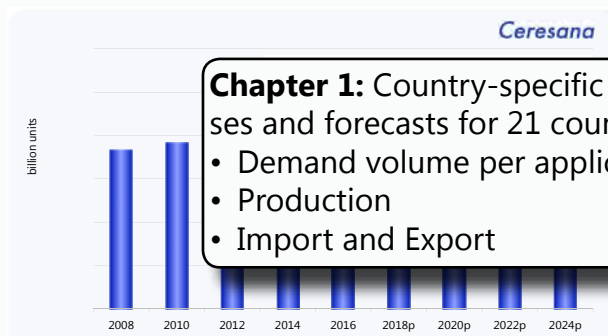
- Demand
- Production
- Import and export
- Application areas



Graph: Import and export of plastic caps and closures in Belgium from 2008 to 2024

1.16.1 Demand – Russia

Russia processed X billion plastic caps and closures in 2016. Compared to 2016, this constitutes an average increase of X% per year. Until 2024, market volume is likely to rise by X% p.a. to approx. X billion units.



Graph: Demand for plastic caps and closures in Russia from 2008 to 2024

Prime sales market in 2016 was the sector lemonades. The highest increase in demand for plastic caps and closures will be recorded in the area water.

After a slight decline during the past years, we forecast demand for carbonated soft drinks in Russia to increase at more dynamic growth rates again on the medium term. Income and purchasing power of private households are currently only rising slowly again which slows down the recovery of the segment. [...]

The market share of PET bottles in the segment beer in Russia is already comparatively high, and customers unquestioningly accept plastic bottles. Beer packed in PET bottles has a shorter shelf life, but this is readily accepted on the Eastern European market.

**Chapter 1: Country-specific analyses and forecasts for 21 countries:**

- Demand volume per application
- Production
- Import and Export

Additionally, PET bottles as packaging for beer were intensively marketed. Russian production of beer has been falling since 2008, which has corresponding effects on demand for plastic closures in this segment.

in billion units	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016-2024
Lemonades	X	X	X	X	X	X	X	X	X	X% p.a.
Water	X	X	X	X	X	X	X	X	X	X% p.a.
Fruit Juices	X	X	X	X	X	X	X	X	X	X% p.a.
Other Non-Alcoholic Beverages	X	X	X	X	X	X	X	X	X	X% p.a.
Beer	X	X	X	X	X	X	X	X	X	X% p.a.
Wine & Spirits	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Beverages Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>
Food	X	X	X	X	X	X	X	X	X	X% p.a.
Cosmetics & Pharma	X	X	X	X	X	X	X	X	X	X% p.a.
Other	X	X	X	X	X	X	X	X	X	X% p.a.
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X% p.a.</b>

Table: Demand for plastic caps and closures in Russia from 2008 to 2024 - split by applications

A passed ban on the sale of alcoholic drinks in PET bottles over 1.5 liters by the Russian parliament will, however, have serious effects on demand development of plastic closures in the beer industry [...]

A modern life style, focused on saving time, becomes more and more the norm among the Russian population. At the same time, many Russians are also led by traditionalism, which influences the choice of ready-made meals. Thus, for example, demand for [...]

**2.8 Cosmetics & Pharma - Applications**

This heading covers plastic caps and closures used for cosmetics and care products such as shampoos, shower gels, creams, lotions, make-up, liquid soaps, and other personal care products. Furthermore, this category covers all caps and closures used as packaging of pharmaceutical products.

in billion units	2008	2010	2012	2014	2016	2018p	2020p	2022p	2024p	2016- 2024
Belgium	X	X	X	X	X	X	X	X	X	X
Bulgaria	X	X	X	X	X	X	X	X	X	X
Germany	X	X	X	X	X	X	X	X	X	X
Finland	X	X	X	X	X	X	X	X	X	X
France	X	X	X	X	X	X	X	X	X	X
Greece	X	X	X	X	X	X	X	X	X	X
United Kingdom	X	X	X	X	X	X	X	X	X	X
Italy	X	X	X	X	X	X	X	X	X	X
Lithuania	X	X	X	X	X	X	X	X	X	X
The Netherlands	X	X	X	X	X	X	X	X	X	X
Austria	X	X	X	X	X	X	X	X	X	X
Poland	X	X	X	X	X	X	X	X	X	X
Portugal	X	X	X	X	X	X	X	X	X	X
Romania	X	X	X	X	X	X	X	X	X	X
Russia	X	X	X	X	X	X	X	X	X	X
Sweden	X	X	X	X	X	X	X	X	X	X
Slovakia	X	X	X	X	X	X	X	X	X	X
Spain	X	X	X	X	X	X	X	X	X	X
Czechia	X	X	X	X	X	X	X	X	X	X
Turkey	X	X	X	X	X	X	X	X	X	X
Hungary	X	X	X	X	X	X	X	X	X	X
Other Europe	X	X	X	X	X	X	X	X	X	X
<b>Total</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>

Table: European demand for plastic caps and closures in the segment cosmetics & pharma from 2008 to 2024 – split by countries

**Chapter 2: Demand per country split by application areas:**

- Lemonades
- Water
- Fruit Juices
- Other non-alcoholic beverages
- Beer
- Wine & Spirits
- Food
- Cosmetics & Pharma
- Other applications (chemicals, household detergents, other household products, pet food)

Consumption of plastic containers for pharmaceutical and medical products is likely to rise at highly dynamic rates in upcoming years. Many industrialized countries are undergoing a demographic process that leads to a notable ageing of the population. The percentage of people older than 65 will increase considerably in these countries. This trend will result in increasing consumption of plastic containers in the segment cosmetics & pharma at above-average growth rates in upcoming years. An even more dynamic development is prevented by a rapidly increasing use of blister packaging in the medical sector.

In 2016, about X billion plastic caps and closures were used for the segment cosmetics & pharma. We forecast total demand for plastic caps and closures in the sector cosmetics & pharma to increase at an average rate of X% p.a. between 2016 and 2024 and to amount to approx. X billion units in 2024.

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 Tel: +33 381 402323  
 Web: www.groupeguillin.com

**Financial Key Data (in million EUR)**

Year	Net Income	Total Revenues
2016	42.6	568.7
2015	38.7	516.4
2014	31.4	497.2
2013	34.7	473.0

*Ceresana*

**General Information about the Company**

**Divisions, Product Range**

The company product portfolio includes:

- Catering packaging: trays, catering containers, cake and pastry containers, dishware
- Fruit and vegetables packaging: insert trays, boxes, punnets and trays
- Meat and food industry packaging: bespoke trays, bespoke containers, tray inserts, thermoforming sheets
- Material equipment: innovative solutions for food packaging, consumables, and solutions for institutional catering

The company operates in the following divisions:

- Mat
- Cate
- Fruit

**Chapter 3:** Data and facts on 79 producers, clearly arranged by:

- Financial key data
- Production sites
- Profile summary

- United Kingdom division

**Production Sites** The company operates 22 facilities in Europe, including Spain, Portugal, the United Kingdom, France, Italy, Germany, the Netherlands and Poland.

**Profile Summary** The Guillin Group was founded in 1972 in Lods, France. It is traded on the Euronext and French stock market. The company employed 2,300 people in Europe in 2016. In the same year, the company's total assets amounted to EUR 568.7 million.

The company expanded its production sites by acquiring various firms in Poland, the United Kingdom, Spain, Portugal and the Netherlands. Guillin acts through 21 subsidiaries in Europe.

In 2015, Guillin announced the acquisition of the KREIS Group, including one German company.

The company's quality management system is ISO 9001 certified.

**Specific Information about Caps and Closures**

Guillin uses thermoforming technology for the production of lids. The company produces plastic lids for different kinds of food containers in various sizes and shapes.

- Catering: sealing films, plastic caps attached and separate to its plastic containers used for salad, cakes and pastries, cooked meat and sandwiches and ready-cooked meals.
- Fruits and vegetables: plastic lids attached to or separate to punnets for packaging fresh fruits
- Meat and food: bespoke plastic containers with attached lids

**Chapter 3:** Detailed profiles of the most important producers, such as Alpla-Werke, Berry, Coveris, Dart Container, Greif, Guillin, Reynolds, and Tetra Laval.

**This study is useful for:**

- Manufacturers, traders, and distributors of caps and closures (e.g. standard closures, screw caps, disk-top and push-pull caps, valve closures, pump and and spray nozzles, tamper-evident caps, lids, caps, plugs, synthetic corks, dispenser, and hinged lids)
- Manufacturers and bottlers of the products lemonades, water, juices, beer, and other beverages, as well as of food, cosmetics, pharmaceuticals, or household chemicals.
- Manufacturers of plastics and additives, e.g. polypropylene, polyethylene, pigments
- Associations and institutes
- Executive board, technology and production, strategic planning, R&D, market research, marketing, sales and distribution, procurement

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- Ethylene - China
- Ethylene - USA
- Fatty Acids
- Fatty Alcohols
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- Fertilizers - World
- Fillers
- Flame Retardants
- Flavors
- Fragrances
- Glycerol
- Hydrofluoric Acid & Fluorochemicals
- Petrochemicals & Plastics - Iran
- Pigments
- Plastic Additives
- Plasticizers
- Propylene - World
- Propylene - China
- Propylene - USA

- Solvents
- Stabilizers
- Styrene
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- Plastics - Europe
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- Polyethylene - LDPE
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- Thermoplastic Elastomers

### Industry

- Adhesives - Europe
- Adhesives - World
- Adhesive Tapes - Europe

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- Insulation Materials - Europe
- Insulation Materials - World
- Paints & Varnishes - Europe
- Paints & Varnishes - World
- Pipes - Europe
- Plastic Extrusion - World
- Plastic Injection - World
- Plastic Pipes - Europe
- Plastic Pipes - World
- Plastic Windows - World
- Printing Inks - World
- Windows & Doors - Europe

### Packaging

- Bags & Sacks - Europe
- Bags & Sacks - World
- Caps & Closures - Europe
- Corrugated, Solid Board & Carton - Eur.
- Flexible Packaging - Europe
- Food Packaging - Europe
- Labels - Europe
- Plastic Bottles - Europe
- Plastic Caps & Closures - Europe
- Plastic Caps & Closures - World
- Plastic Containers - World
- Plastic Films - Europe
- Plastic Films - World
- Rigid Metal Packaging - Europe

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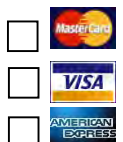
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