

World Cosmetics Packaging Market 2013-2023

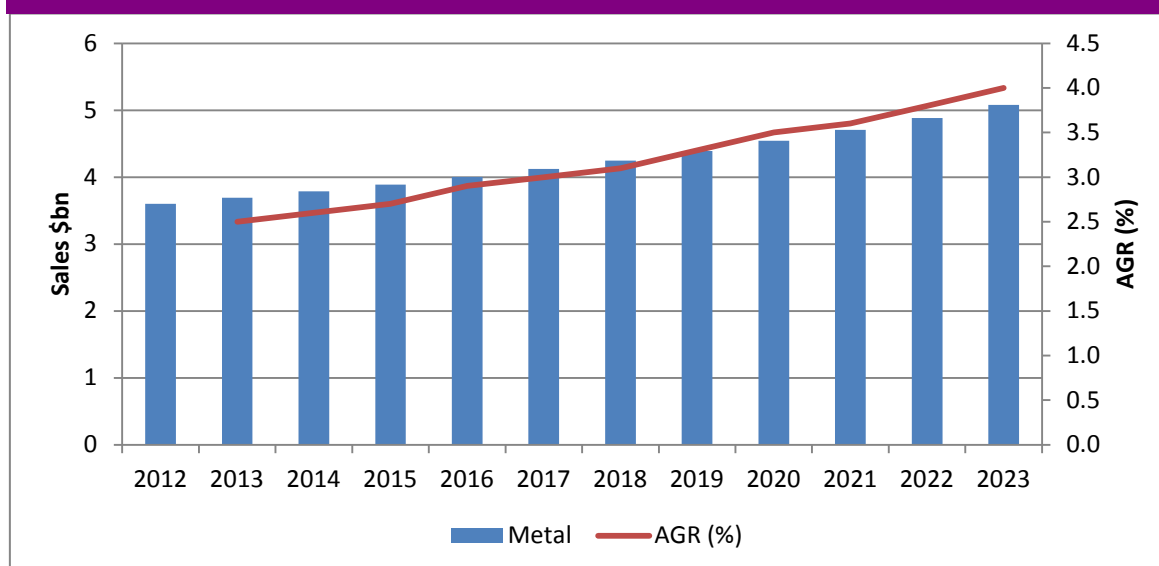
4.5. Metal Cosmetics Packaging Market Forecast 2013-2023

Table 4.5 Metal Cosmetics Packaging Market Forecast 2013-2023 (\$bn, AGR %, CAGR%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2013-23
Sales \$bn	3.60	3.69	3.79	3.89	4.00	4.12	4.25	4.39	4.54	4.71	4.88	5.08	50.94
AGR (%)		2.5	2.6	2.7	2.9	3.0	3.1	3.3	3.5	3.6	3.8	4.0	
CAGR (%) 2013-18	2.9						2018-23	3.6					
CAGR (%) 2013-23	3.2												

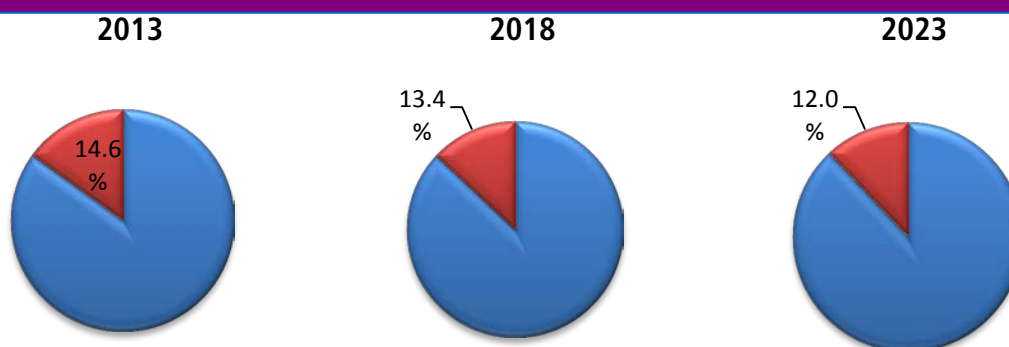
Source: *Visiongain 2013*

Figure 4.11 Metal Cosmetics Packaging Market Forecast 2013-2023 (\$bn, AGR%)



Source: *Visiongain 2013*

Figure 4.12 Metal Cosmetics Packaging Market Share Forecast 2013, 2018 and 2023 (% Share)



Source: *Visiongain 2013*

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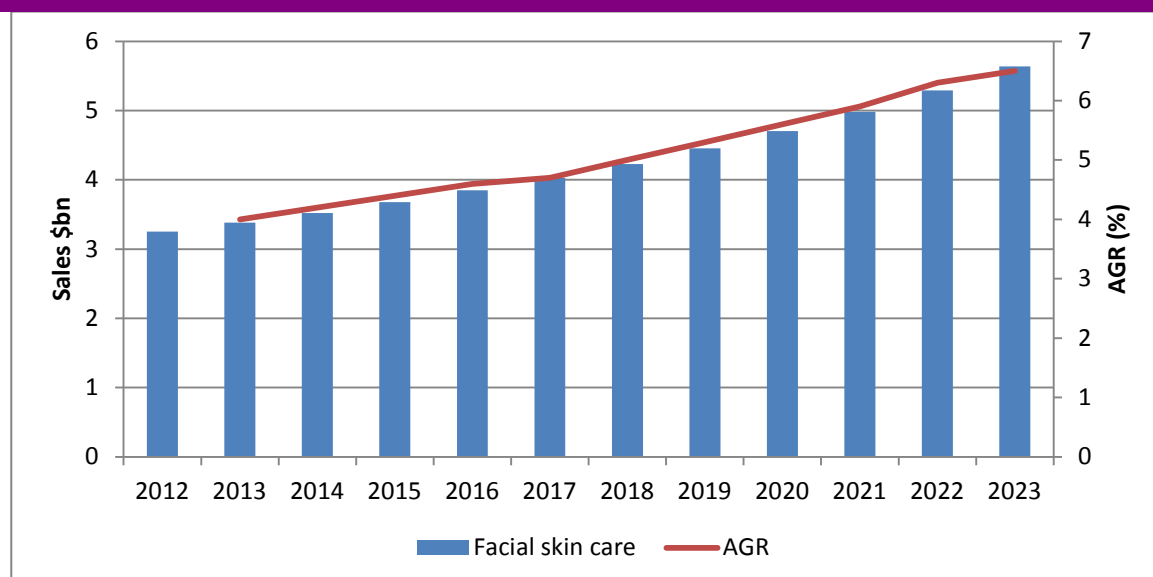
5.3 Facial Skin Care Packaging Market Forecast 2013-2023

Table 5.3 Facial Skin Care Packaging Market Forecast 2013-2023 (\$bn, AGR %, CAGR%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2013-23
Sales \$bn	3.25	3.38	3.52	3.68	3.85	4.03	4.23	4.45	4.70	4.98	5.29	5.64	50.99
AGR (%)		4.0	4.2	4.4	4.6	4.7	5.0	5.3	5.6	5.9	6.3	6.5	
CAGR (%) 2013-18	4.6						2018-23	5.9					
CAGR (%) 2013-23	5.2												

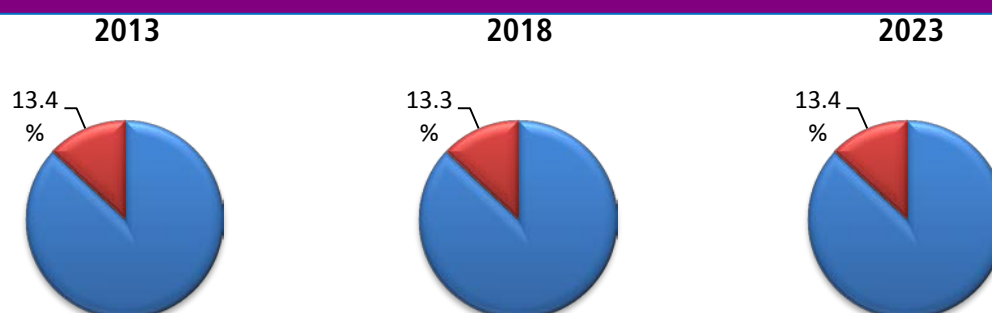
Source: *Visiongain 2013*

Figure 5.7 Facial Skin Care Packaging Market Forecast 2013-2023 (\$bn, AGR%)



Source: *Visiongain 2013*

Figure 5.8 Facial Skin Care Packaging Market Share Forecast 2013, 2018 and 2023 (% Share)



Source: *Visiongain 2013*

World Cosmetics Packaging Market 2013-2023

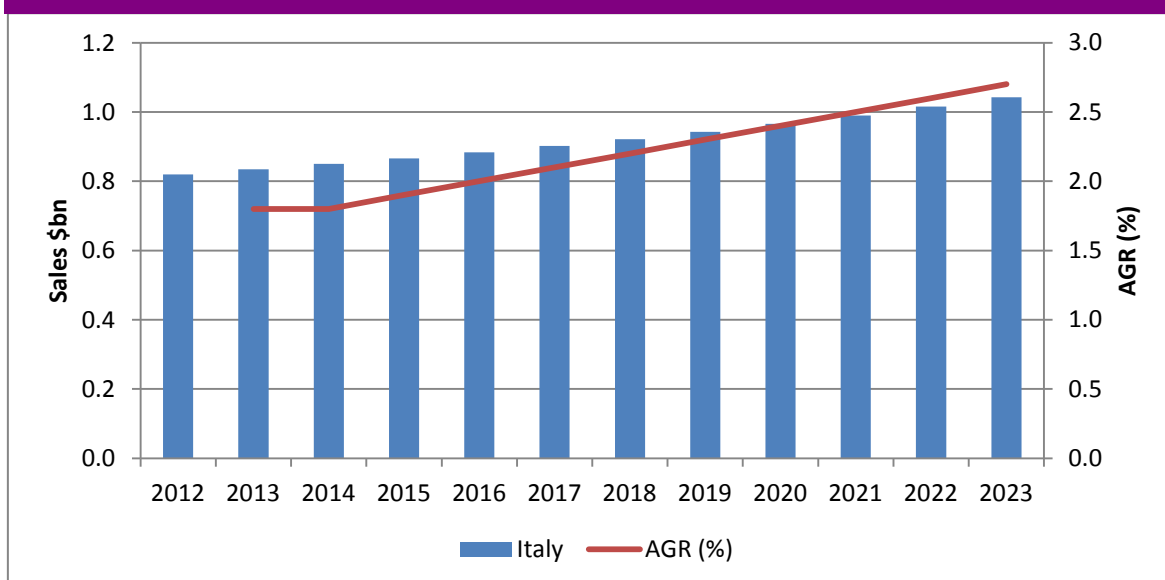
6.7 Italian Cosmetics Packaging Market Forecast 2013-2023

Table 6.14 Italian Cosmetics Packaging Market Forecast 2013-2023 (\$bn, AGR %, CAGR%)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2013-23
Sales \$bn	0.82	0.83	0.85	0.87	0.88	0.90	0.92	0.94	0.97	0.99	1.02	1.04	11.03
AGR (%)		1.8	1.8	1.9	2.0	2.1	2.2	2.3	2.4	2.5	2.6	2.7	
CAGR (%) 2013-18	2.0						2018-23	2.5					
CAGR (%) 2013-23	2.2												

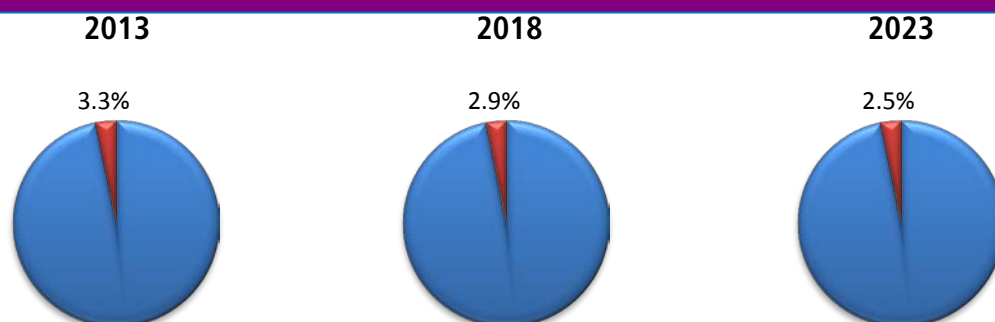
Source: *Visiongain 2013*

Figure 6.17 Italian Cosmetics Packaging Market Forecast 2013-2023 (\$bn, AGR%)



Source: *Visiongain 2013*

Figure 6.18 Italian Cosmetics Packaging Market Share Forecast 2013, 2018 and 2023 (% Share)



Source: *Visiongain 2013*

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8. Expert Opinion

8.1 Rob Tipper, Sales Manager, Rieke Packaging Systems

Visiongain interviewed Rob Tipper, Sales Manager of Rieke Packaging Systems in April 2013. Visiongain appreciates him sharing his thoughts on issues relating to cosmetics packaging markets.

Rieke Packaging Systems specialises in closures and dispensers for various packaging markets, such as pharmaceutical, personal care, cosmetics, household items, lubricants, paints and chemicals. The company produces drum closures, pail and can products, dispensing solutions, lightweight closures, stacking closures and other dispensers, and is one of the world's largest manufacturers of foamers and airless dispensers.

For the cosmetics packaging market the company produces dispensers, fine mist sprayers, foamer bottles, foamer pumps, gallon pumps, lotion pumps, regular sprayers, treatment pumps, triggers and tubes. The company is the 12th leading cosmetics packaging company in the world, and has been calculated by visiongain to hold 0.2% of the global cosmetics packaging market sales.

8.1.1 Bespoke Packaging and Decoration Key Trends

Visiongain: *What would you say are the key trends and developments in cosmetic packaging dispensers and closures at the moment?*

Rob Tipper: Bespoke packaging is becoming the norm as more cosmetic manufacturers move away from standard packaging ranges. Highly decorated packs are increasing in number as these companies are looking to differentiate and sell on added value/premium.

8.1.2 Airless Dispensers a Major Growth Area

Visiongain: *What are the major growth areas in cosmetics and personal care dispensers and closures and why?*

Rob Tipper: Airless Dispensers are growing in popularity as manufacturers look to use less preservatives in their products and advertise their "Natural" ingredients and Green credentials.

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vibrating roll-on, airtight mascara pen, lipstick case with magnetic closure and airless click and tint pen with brush applicator.

The company is a mid-sized company and utilises tools and patents to maintain their position. The company employs up to 50 people in its offices but outsources all of its manufacturing, to approximately five factories in Japan, China and Korea. It serves a variety of clients from blue-chip companies to smaller boutique brands. Over the past few years the company has reportedly been growing at a good pace.

9.5 Crown Holdings Inc.

Table 9.6 Crown Holdings Inc. Overview 2012 (Total Revenue, Revenue from Market, Ticker, Contact, Website)

	2012
Total company revenue \$bn	\$8.5bn overall
Revenue from this market \$bn	Estimated \$200m
Headquarters	Philadelphia, PA, US
Ticker	NYSE: CCK
IR Contact	Thomas A. Kelly, Senior Vice President – Finance +1 (215) 698-5341 ir@crowncork.com
Website	http://www.crowncork.com/

Source: *Visiongain 2013*

Crown Holdings Inc. is engaged in the design, manufacture and sale of packaging products for consumer goods. The Company's primary products include steel and aluminium cans, metal closures and caps, and aerosol cans for food and beverage (approximately 88% of revenues), and for household items, industrial market and personal care (approximately 12% of revenues). For the industrial market the company manufactures steel containers for paints, coatings, inks, chemical, and automotive products. The amount of revenues Crown gets from cosmetics and personal care packaging segments is relatively small after it sold its Cosmetics Packaging business in 2006.

The company operates in 149 plants in 41 countries in Americas, Europe and Asia-Pacific and it has nearly 22,000 employees. Its revenues from its packaging products other than food and