

COSMETIC PACKAGING MARKET

BY TYPE, MATERIAL (Plastic, Glass, Metal, Paper), **APPLICATION** (Hair Care, Nail Care, Skin Care, Make-Up) & **BY PACKAGING MACHINERY** (Filling, Unscrambler, Sealing, Conveyor) & **GEOGRAPHY**

— Global Trend & Forecast To 2018



MARKETSANDMARKETS

It's all about markets

MarketsandMarkets

sales@marketsandmarkets.com

www.marketsandmarkets.com

MarketsandMarkets is a global market research and consulting company based in the U.S. We publish strategically analyzed market research reports and serve as a business intelligence partner to Fortune 500 companies across the world. MarketsandMarkets also provides multi-client reports, company profiles, databases, and custom research services.

MarketsandMarkets covers fourteen industry verticals, including aerospace & defence, advanced materials, automotives and transportation, banking and financial services, biotechnology, chemicals, consumer goods, energy and power, food and beverages, industrial automation, medical devices, pharmaceuticals, semiconductor and electronics, and telecommunications and IT.

Copyright © 2013 MarketsandMarkets

All Rights Reserved. This document contains highly confidential information and is the sole property of MarketsandMarkets. No part of it may be circulated, copied, quoted, or otherwise reproduced without the approval of MarketsandMarkets.

1 EXECUTIVE SUMMARY

The cosmetics industry has witnessed an extraordinary growth in last two decades and signifies the changing socio-economical and cultural trends. The different beauty segments are complementary to each other and are able to satisfy the diverse needs of their customers. Today the use of cosmetics is not only limited to the women; men's cosmetics also play a significant role in the cosmetic industry.

Cosmetics and cosmetic packaging industries are directly related to each other, growth of cosmetic industry also signifies the growing cosmetic packaging industry. The cosmetic packaging market has grown during the last few years and is expected to grow more in the future with a high growth rate.

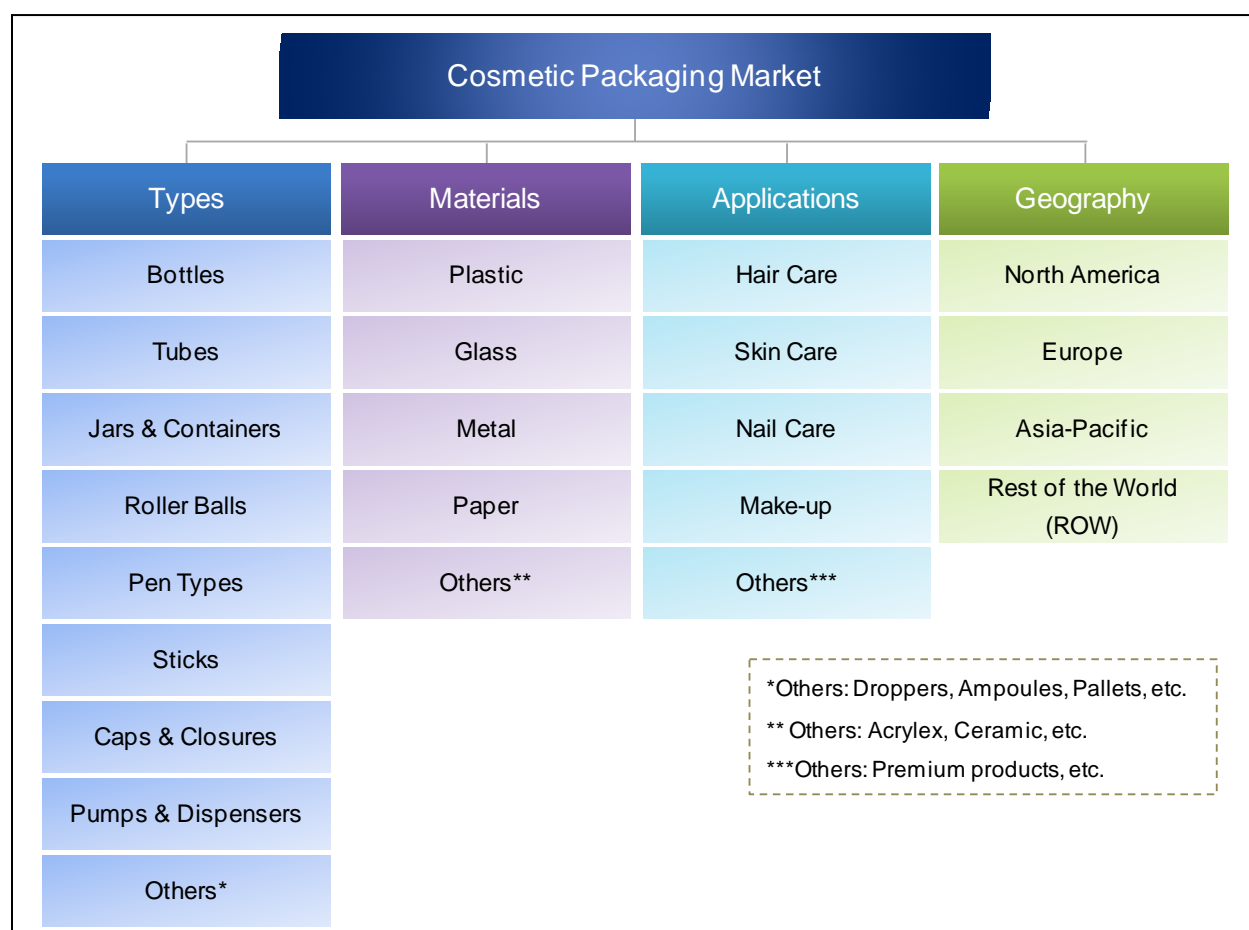
Packaging is an essential marketing element for the cosmetic products. It reflects the image of the cosmetic products and attracts the consumer attention. Cosmetic packaging industry is directly proportional to the success of cosmetic products, and the leading players garner yields in the future. Changing consumers taste and preferences, to access premium cosmetic products, have essentially increased need for premium designing and better engineering of packaging, thus escalating significance of the cosmetic packaging.

The rising men's grooming sector in the developing countries drives the skin care and hair care sectors with the packaging that depicts their style and preferences. These factors, altogether, drive the cosmetic packaging market.

2 PREMIUM INSIGHTS

FIGURE 1

COSMETIC PACKAGING MARKET SEGMENTATION

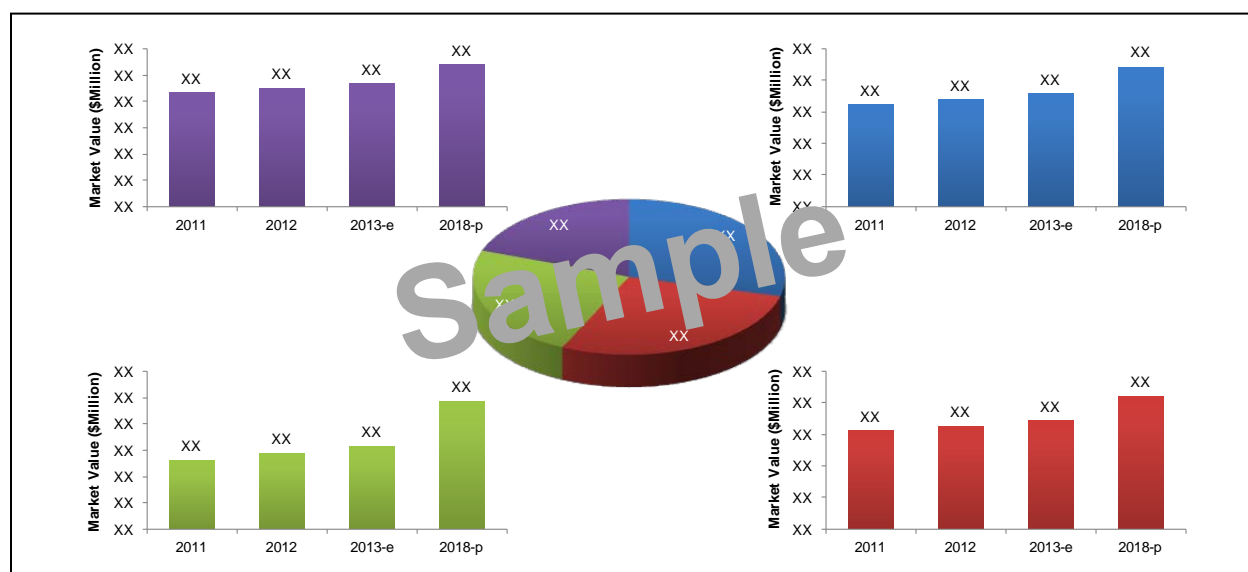


Source: MarketsandMarkets Analysis

The cosmetic packaging market is segmented on the basis of types, applications, materials, and geography. Different types of cosmetic packaging, with various innovations, are introduced in the market. The different types of cosmetic packaging materials, excluding toiletries and fragrances, are taken into consideration for the study. The types of cosmetic packaging material in the study include paper, plastic, glass, metal, and others.

FIGURE 2

COSMETIC PACKAGING MARKET VALUE SHARE, BY GEOGRAPHY, 2012 & MARKET VALUE, BY GEOGRAPHY, 2011-2018 (\$MILLION)



Source: MarketsandMarkets Analysis

The cosmetic packaging market was dominated by North America with XX% share, followed closely by Europe with XX% share in 2012. The market in North America was dominated by U.S. The market in Europe was led by Germany, followed by France, in 2012. Asia-Pacific market was led by China followed by India, in 2012. The rising disposable income and increasing use of cosmetics are driving the market for cosmetic packaging in Asia-Pacific. Emerging countries such as Brazil from the ROW region dominated the market with the increasing demand for cosmetic packaging and cosmetic packaging machinery.

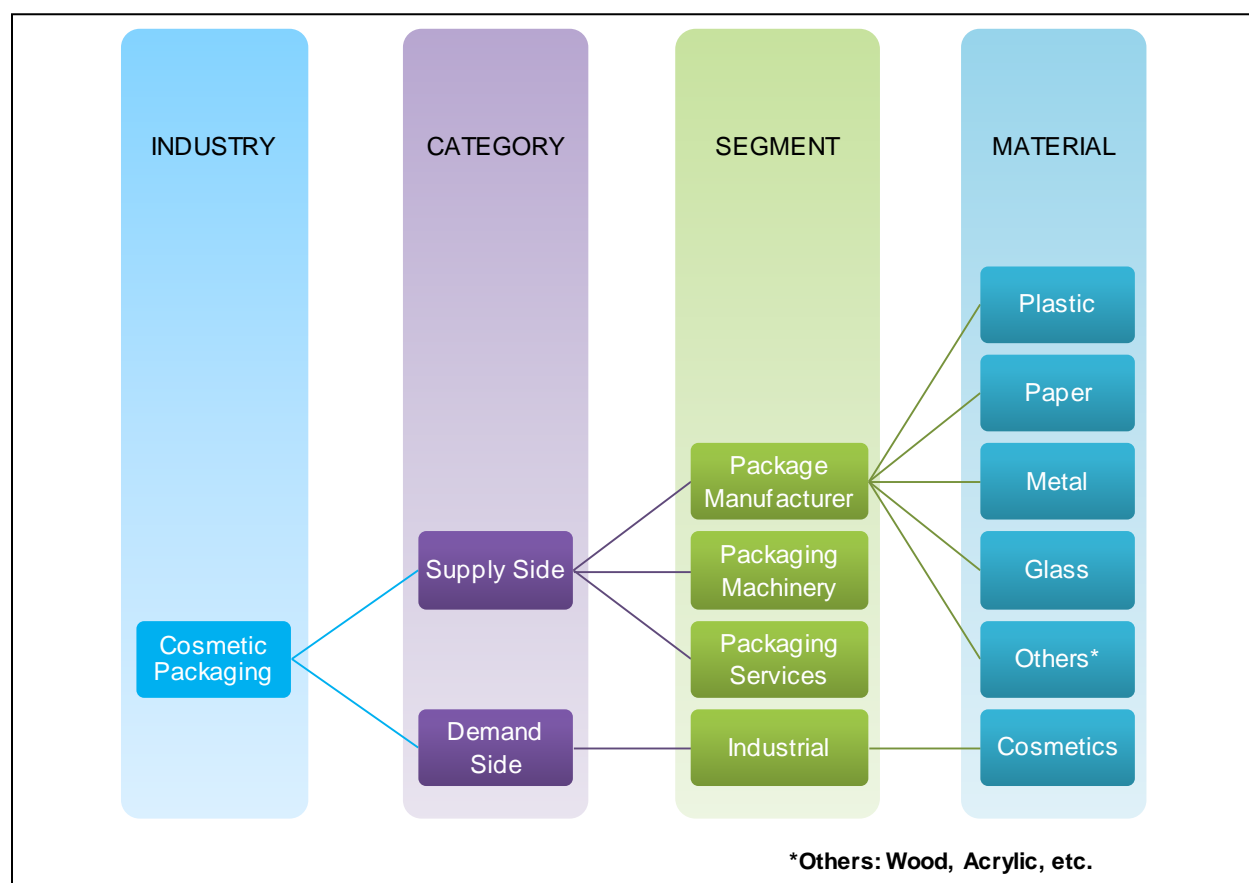
3 INDUSTRY ANALYSIS

3.1 INTRODUCTION

The cosmetics market is characterized as one of the fastest growing segments of consumer goods. The market growth is attributed to the increasing average age, changing consumer demands, etc. that has driven the sales of skin care products and make-up essentials. The market was initiated with products for women, but has now expanded to the male grooming as well.

FIGURE 3

COSMETIC PACKAGING INDUSTRY SEGMENTATION



Source: MarketsandMarkets Analysis

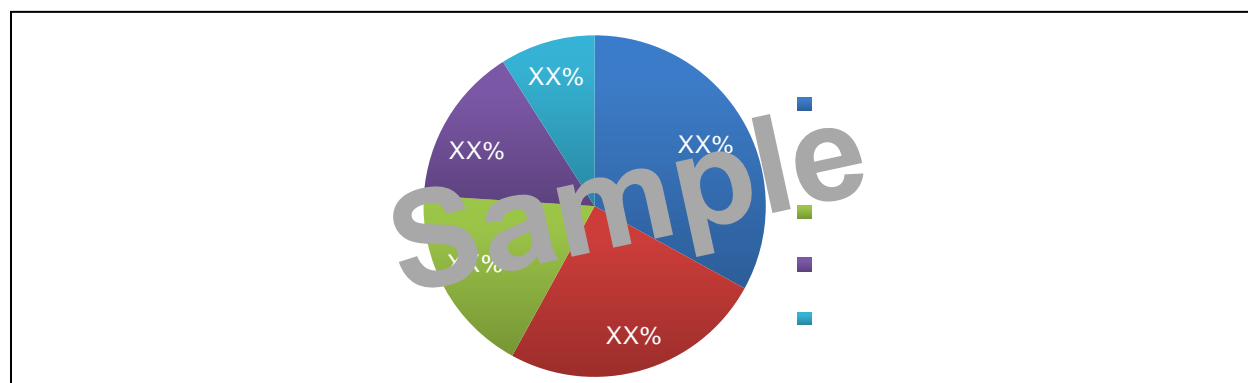
4 COSMETICS MARKET OVERVIEW

4.1 INTRODUCTION

The cosmetics industry is widespread, spanning across applications of hair care, skin care, nail care, make-up, etc. for women, aging population, etc. The growing diversity in the available cosmetic products also includes male grooming products. The cosmetic products available in different regions reflect the local environment and consumer demand. Demand for the anti-aging creams and skin care products continue in the developed countries, while demand for the natural/organic cosmetic products grows significantly in most of the countries. The demand for self-tanning lotions and creams have increased in the developed countries, while the demand for whitening creams and lotions increase in the developing countries such as India.

FIGURE 4

COSMETICS MARKET VALUE SHARE, BY SEGMENT, 2012



*Others: excludes toiletries such as bath and shower products, oral hygiene, etc.

Source: FAO, Euromonitor, and MarketsandMarkets Analysis

In 2012, the largest cosmetic segment was skin care that accounted for a value share of about XX%. The hair care segment accounted for a value share of about XX%. The experts estimate the hair care market to grow further with the introduction of luxury brands and products such as hair sprays, hair dyes, etc. Color cosmetics formed the third largest segment, which includes foundations, nail colors, lip colors, compacts, eye make-up, etc.

4.2 IMPACT ANALYSIS

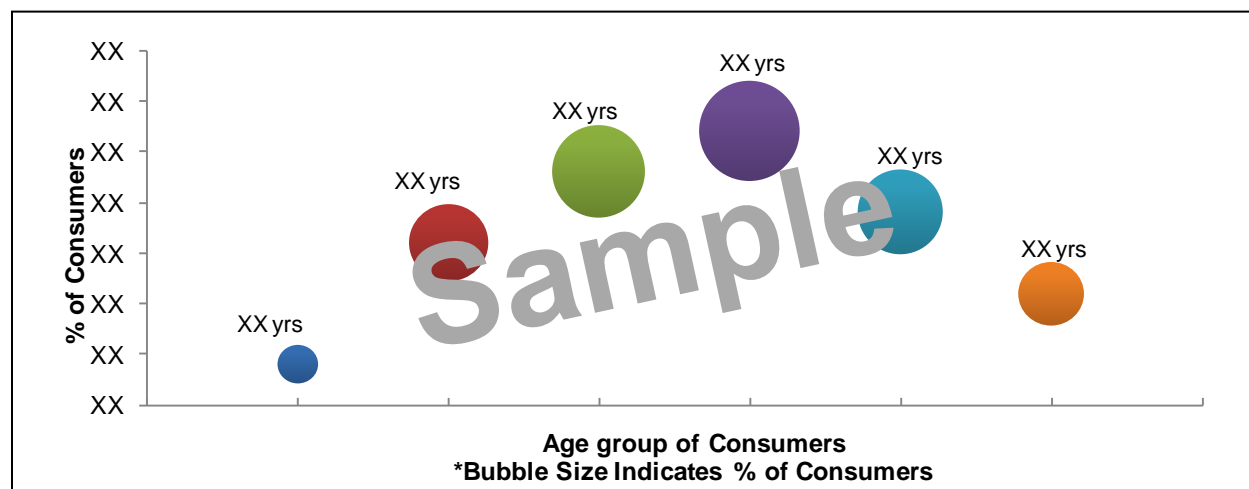
4.2.1 DRIVERS

4.2.1.1 Increase of Aging Population

The desire for beauty drives the cosmetic and beauty market. The consumers demand cosmetic products to boost their self-confidence. The cosmetics market comprises of diversified population among which the aging population forms a significant segment. The number of people falling under the average age-group of the world population is increasing with the new advanced medical and health care facilities.

FIGURE 5

COSMETIC CONSUMPTION SHARE, BY AGE GROUP, 2012



Source: Euromonitor, FAO, and MarketsandMarkets Analysis

The aging populations demand the cosmetic products to enhance their beauty and confidence. The cosmetic products are largely used by the aging and middle-aged populations that were ranging between XXyrs-XXyrs. The anti-aging creams and lotions, anti-wrinkle cream, concealers, etc. form a significant cosmetic segment purchased by the aging world population.

5 COSMETIC PACKAGING MARKET OVERVIEW

5.1 INTRODUCTION

Cosmetic packaging market is driven by increasing the demand for cosmetic products. However, demand for the cosmetic products is dependent on simplicity of its packaging and attractiveness. The packaging is an essential factor in the industry that determines the salability of any product. Packaging reflects the information, style, and image of the target end-user. It signifies the commercial identity of the cosmetic product. It is considered as a significant competitive element in the market.

Packaging is a key medium between the product and its target consumers. Cosmetic packaging plays an essential role of protecting the contents from outer environment and extending its shelf life. Packaging is also done so as to prevent the contamination of the contents and avoids microbial growth. It is also crucial that the packaging material should be compatible with its pack contents and formulations.

The key to a successful cosmetic packaging is a simple, consumer-friendly design that simultaneously depicts the product brand image. The cosmetic players work in close association with the leading packaging players to develop compatible packaging that act as a reflection of their products. The premium cosmetic players invest continually in designing and engineering of the packaging. The cosmetic packaging players also continually develop new decorative, stylish and creative products to attract their customers.

5.2 IMPACT ANALYSIS

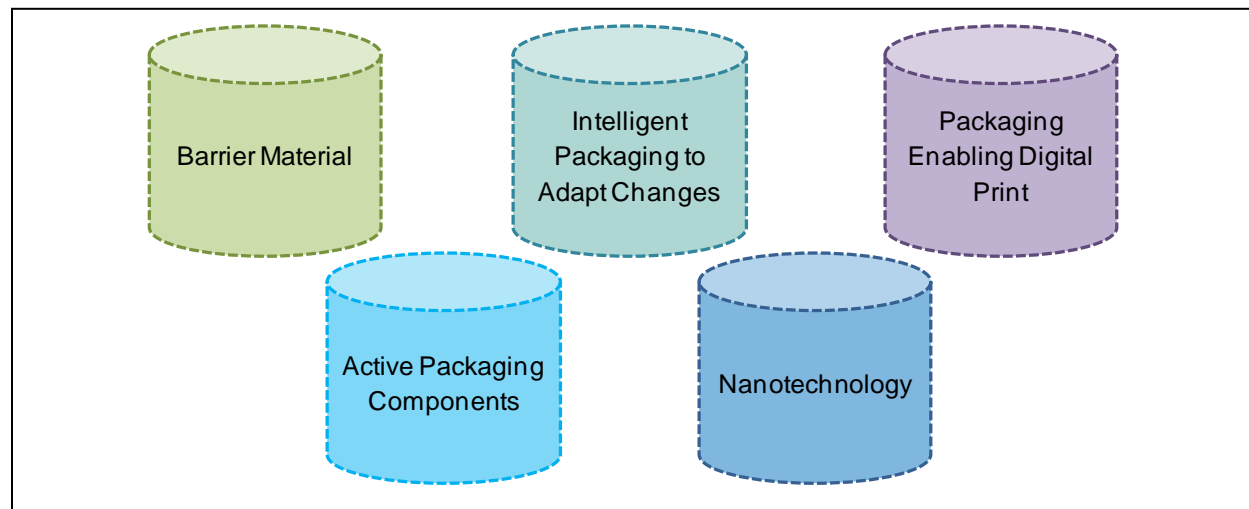
5.2.1 OPPORTUNITIES

5.2.1.1 New Packaging Material Development

Heavy investment on innovation for packaging products is an essential characteristic of the market. Packaging of a cosmetic product requires high-performance materials that function as a barrier to the outer environment. The development of new materials that can fulfill the desired functions can open new opportunities for the packaging industry.

FIGURE 6

DESIRED PACKAGING MATERIALS WITH SPECIFIC FUNCTIONALITY CONSIDERED FOR DEVELOPMENT



Source: MarketsandMarkets Analysis

The desired materials must be strong with active components that can be modified based on the contents and environment. The materials should also be able to extend the shelf life of the contents and help stocking of the final products. The development of new packaging materials with desired functionalities can help in driving the market growth.

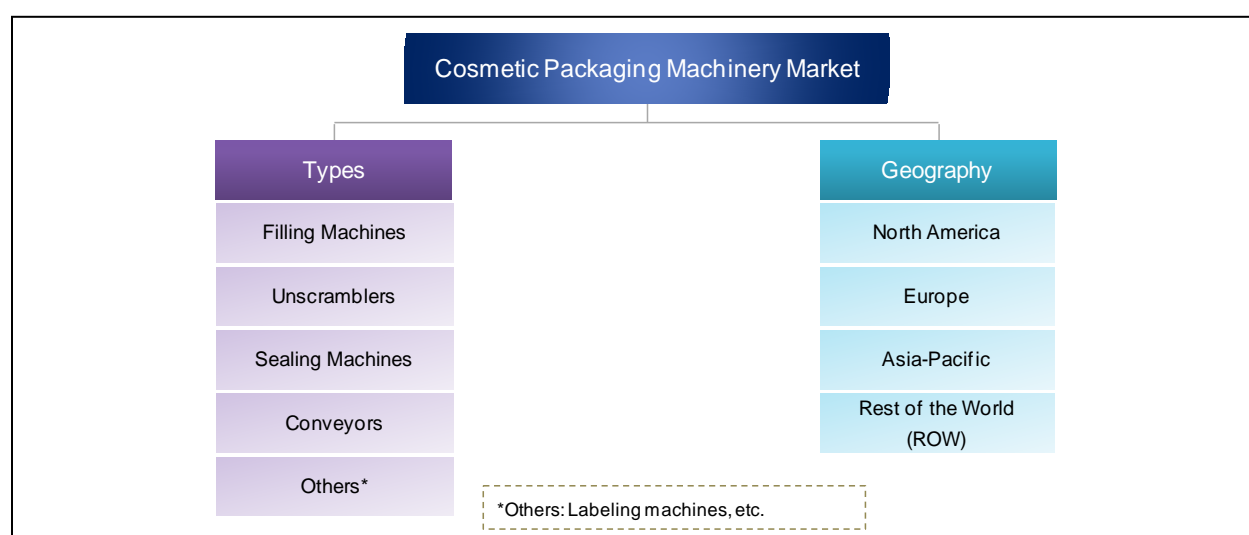
6 COSMETIC PACKAGING MACHINERY MARKET OVERVIEW

6.1 INTRODUCTION

The primary cosmetic machinery industry includes diversified players that provide technological solutions for packaging of variety of products. Current scenario in the market establishes the need for machineries that are efficient, advanced, and automated. The cosmetic packaging players continually invest to introduce new or advanced technology. The increasing demand for the cosmetics and cosmetic packaging drives the demand for cosmetic packaging machinery. The market demand for packaging machinery is driven by efficient packaging processes and introduction of integrated, multifunctional operational systems. The stakeholders of the cosmetic packaging machinery have power to influence the market depending on the industry scenario. Demand for the packaging machinery is projected to increase with emerging markets. Asia-Pacific market is projected to increase with the increasing demand for mass packaged cosmetic products.

FIGURE 7

COSMETIC PACKAGING MACHINERY MARKET SEGMENTATION



Source: MarketsandMarkets Analysis

6.2 IMPACT ANALYSIS

6.2.1 DRIVERS

6.2.1.1 Introduction of Controlled & Efficient Packaging Processes

The machinery market is driven by demand for controlled and efficient production processes. The consumer demand for cosmetic products has increased in the market, resulting in demand for efficient packaging; further resulting in the increasing demand for efficient packaging equipment that manufactures higher volume of products with specified quality. The competitors in the machinery industry introduce equipment that are differentiated and technologically advanced to compete in the market.

The machinery producers invest in innovative equipment designs with varied levels of automation that help the product manufacturer to efficiently control the product production process. The advanced packaging machinery and assembly produce products of consistent quality, minimizing rejection of products during quality inspections. This further adds to the efficiency of the machinery. Minimum rejection of products further increases the throughput and results in significant saving of energy. Thus, the equipment that addresses the productivity, consistency, quality and throughput of the production process drives the market.

6.2.1.2 Integrated & Multifunctional Operating Solutions with Competent Machinery Assembly Line

The packaging machinery market grows with introduction of integrated and multifunctional equipment and assembly lines. The demand for packaging machinery that can perform varied functions in the same assembly has added advantage of being time-efficient and cost-efficient, and reducing waste. Integrated and multifunctional machinery aids in reducing the labor for transfer of products from one machine to other, bringing the in-process wastage of products.

Integrated packaging equipment such as Vertical Form Fill Seal (VFFS), feeding & accumulation, filling & capping, etc. offers unique advantage of efficient product filling and primary packaging of cosmetics, together. Demand for premium packaging has further

increased the need for machineries that offer greater visual appeal and better finished packaging. The demand for advanced labeling of products has further driven the demand for the advanced sealing and labeling equipment.

7 COSMETIC PACKAGING MARKET, BY TYPE

7.1 INTRODUCTION

The packaging of cosmetics serves as product protection and is also intended to influence customers to buy the product. The consumers' demand for more convenient and better performing packaging is influencing the cosmetic packaging to be more innovative. Cosmetic packaging manufacturers are developing creative technology and a wide range of innovative choices to serve the customers' requirements.

The various types of cosmetic packaging include bottles, tubes, jars & containers, roller balls, etc. for different cosmetic products. Bottles are used for mascara, eyeliner, lip gloss, cream, etc. Jars & containers have the largest market for the cosmetic packaging types market.

TABLE 1

**COSMETIC PACKAGING MARKET VALUE, BY TYPE,
2011–2018 (\$MILLION)**

Type	2011	2012	2013-e	2018-p	CAGR% (2013–2018)
Bottles	XX	XX	XX	XX	XX
Tubes	XX	XX	XX	XX	XX
Jars & containers	XX	XX	XX	XX	XX
Roller balls	XX	XX	XX	XX	XX
Pen types	XX	XX	XX	XX	XX
Sticks	XX	XX	XX	XX	XX
Caps & closures	XX	XX	XX	XX	XX
Pumps & dispensers	XX	XX	XX	XX	XX

Type	2011	2012	2013-e	2018-p	CAGR% (2013–2018)
Others	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

e – Estimated; p – Projected

Source: Related Research Publication, Government Publication, Company Press Release, Company Annual Report, Company Website, Company Publication, and MarketsandMarkets Analysis

The cosmetic packaging market is projected to reach value of \$XX million by 2018. The packaging type market was largest for jars & containers that accounted for a value share of about XX% in 2012. The jars & containers include cosmetic plastic & glass jars, containers, etc. Caps & closures are projected to be the fastest growing types with a CAGR of XX%. Bottles were the second largest packaging type in the market with a value of \$XX million in 2012.

8 COSMETIC PACKAGING MARKET, BY MATERIAL

8.1 INTRODUCTION

The packaging is designed to save the contents from contamination by dust, fibers, and microorganisms and also from environmental factors such as moisture, temperature, etc. Cosmetics are chemical substances that are prone to contamination, and saving the cosmetic through packaging has been an essential element of cosmetic industry. The cosmetic segment takes up a large share in the packaging industry.

The cosmetic packaging market has developed into one of the most lucrative markets for the packaging industry. The rising middle-class standards and increasing disposable income have led to the change in consumers' shopping patterns. This development stimulates the overall packaging industry as well as the cosmetic packaging industry. This demand has also fueled up the market for innovative packaging machinery and new technologies producing materials for packaging solutions in cosmetic industry. The cosmetic packaging industry includes global players as well as small and medium-sized highly specialized companies.

Cosmetic packaging manufacturers have been investing in the development of packaging materials, packaging technology, and diversification in designs to match the requirement of cosmetic products. In 2012, North America led the plastic cosmetic packaging value market and is projected to register \$XX million by 2018.

8.1.1 BARRIER PROPERTIES

Cosmetic manufacturers have been using sustainable packaging materials with gas barrier properties to avoid tainting and degradation of the sensitive constituents of the product. Cosmetic manufacturers usually focus on this barrier property to select packaging material. Increasing shelf life of packaging materials plays an important role for the oil-like sensitive components. Mascara, and lip gloss can permeate through plastic material and hence, require material that can retain the product. Thus, barrier properties turn out to be an essential component in choosing packaging material for cosmetics.

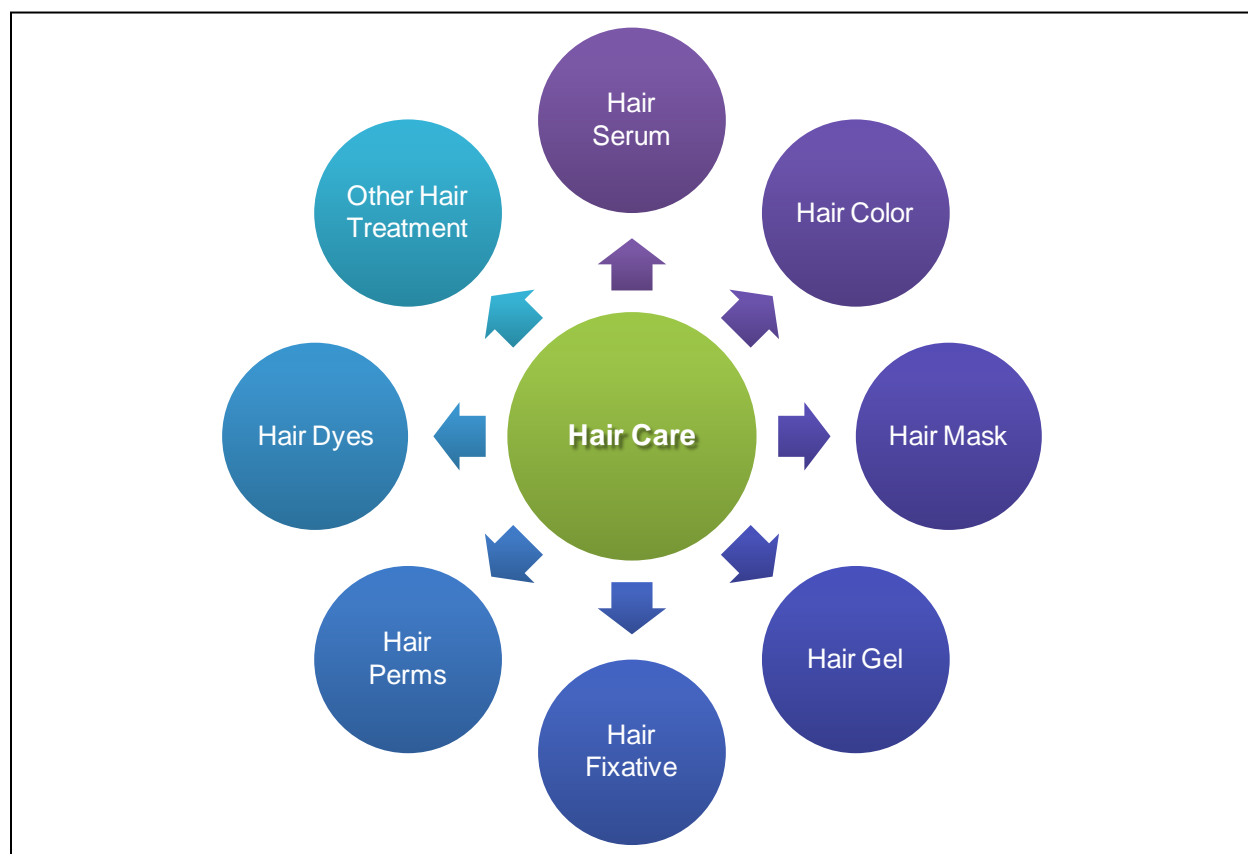
9 COSMETIC PACKAGING MARKET, BY APPLICATION

9.1 HAIR CARE

Hair care industry is expected to record a continuous growth in the future. The hair care products include hair mask, hair gel, hair serum, hair color etc. These products are available in different types of packaging such as bottles, pumps & dispensers, jars & containers, pouches, and sachets.

FIGURE 8

HAIR CARE PRODUCTS



Source: Cosmetic Magazine, Company Publication, and MarketsandMarkets Analysis

10 COSMETIC PACKAGING MARKET, BY GEOGRAPHY

10.1 INTRODUCTION

Cosmetic packaging market is driven by increasing application of cosmetic products for skin care, hair care, etc. Cosmetics' consumption is driven by developing economy and increasing consumer income. The cosmetic manufacturers thus demand more packaging solutions. The innovation in the packaging solutions that extends the shelf life of pack contents has enabled the cosmetic manufacturers to pack sensitive cosmetic formulations such as anti-aging products, dark spot removal formulations, etc. The consumers in developed as well as developing regions demand more premium products that can be easily used.

The developed countries in North America and Europe are mature markets with demand for simple, sophisticated and practical packaging solutions for cosmetics. These markets have recorded an increasing demand for premium cosmetic products such as men's grooming products, anti-aging products, etc. that require premium packaging. The decorative design and unique aesthetics of the packaging, reflecting its content image drives the market growth.

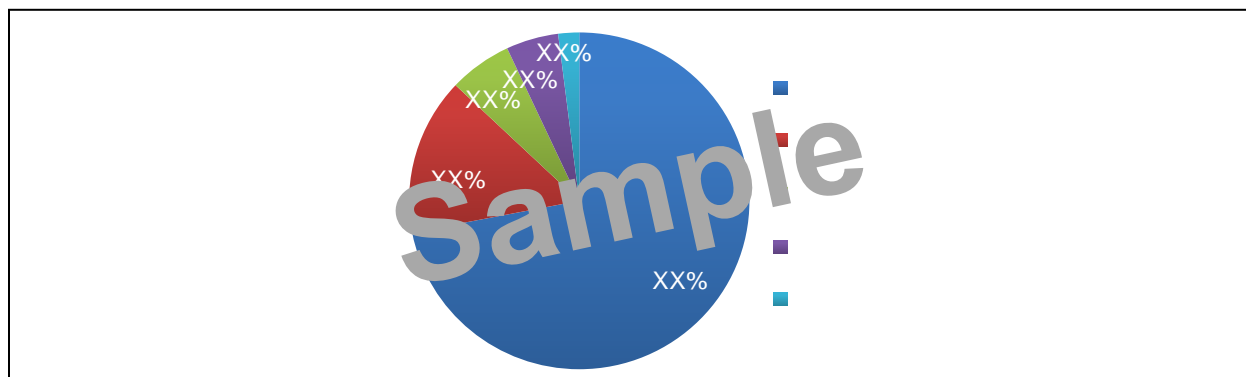
The developing countries in Asia-Pacific and Latin America are considered as the emerging markets for the cosmetic packaging industry. The increasing disposable income has resulted in higher consumer living standards. The Asia-Pacific market is characterized by high population and mass demand for cosmetic products. Introduction of small cosmetic packaging sizes, especially for the developing countries such as India, further drives the market.

10.2 NORTH AMERICA

In 2012, the North American market was the largest cosmetic packaging market with a value share of about XX%. The market trend for new designs, coloring, and decorative packaging has been observed, inclining towards the expensive cosmetic brands. The North American market for cosmetics is mature and so the demand for cosmetic packaging is projected to grow with increasing population and improved packaging design or engineering. U.S. dominated the market with the consumers demanding simple, yet unique packaging solutions.

FIGURE 9

NORTH AMERICA: COSMETIC PACKAGING MARKET VALUE SHARE, BY MATERIAL, 2012



Source: MarketsandMarkets Analysis

In 2012, the North American cosmetic packaging material market was dominated by plastic, followed by paper packaging material, which accounted for a value share of about XX% and XX%, respectively. Paper packaging materials are used for cosmetic products such as compacts.

11 COSMETIC PACKAGING MACHINERY, BY TYPE

11.1 INTRODUCTION

The cosmetic packaging market has developed into one of the most lucrative markets for the packaging industry. The rising middle class and increasing disposable income has led to the change in consumers' shopping patterns. This development stimulates the overall packaging industry as well as the cosmetic packaging industry. This demand has also fuelled up the market for innovative packaging machinery and new technologies producing materials for packaging solutions in the cosmetic industry. The packaging industry includes global players as well as small and medium sized highly specialized companies. The packaging equipment industry is characterized by increasing demand for automated and integrated machinery as well as for environment-friendly equipment.

TABLE 2

COSMETIC PACKAGING MACHINERY MARKET VALUE, BY TYPE, 2011–2018 (\$MILLION)

Type	2011	2012	2013-e	2018-p	CAGR% (2013–2018)
Filling machines	XX	XX	XX	XX	XX
Unscramblers	XX	XX	XX	XX	XX
Sealing machines	XX	XX	XX	XX	XX
Conveyors	XX	XX	XX	XX	XX
Others	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

e- Estimated; p- Projected

Source: Related Research Publication, Government Publication, Company Press Release, Company Annual Report, Company Website, Company Publication, and MarketsandMarkets Analysis

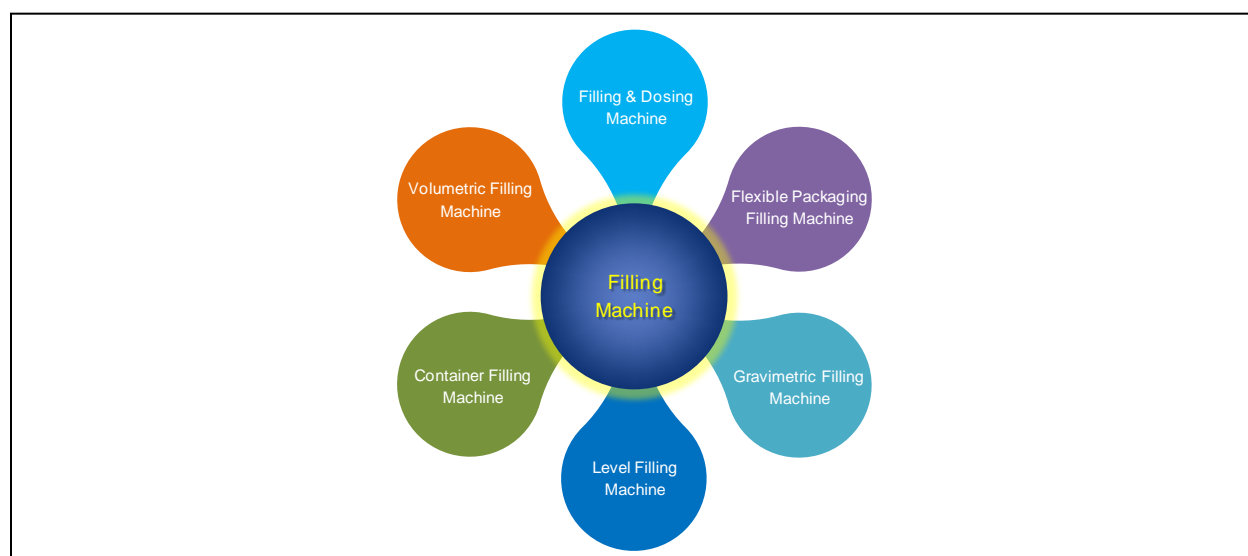
The cosmetic packaging machinery was worth \$XX million in 2012 and is projected to reach \$XX million at a CAGR of XX% by 2018. The market was dominated by the filling machinery segment that accounted for a value share of about XX% in 2012 and is projected to grow at a CAGR of XX% to reach \$XX million by 2018. The filling machinery is used to dispense the cosmetic formulations in their respective packaging. Different types of filling machineries are used depending on the nature and quantity of the cosmetic products that have to be packaged. The application of sealing machines, conveyors, and unscramblers play an essential role in the proper packaging of the products. The Sealing machines and Unscramblers segments are projected to grow at a CAGR of XX% and XX%, respectively.

11.2 FILLING MACHINE

Filling machines are a form of packaging machines with several mechanical components and parts. These components for filling lines comprises of washers, sterilizers, bottle separators, label applicators, etc. These machines measure the product from the immense supply by some preset value; for instance, volume, mass or count.

FIGURE 10

TYPES OF FILLING MACHINERIES



Source: Related Research Publication, Company Website, and MarketsandMarkets Analysis

12 COSMETIC PACKAGING MACHINERY, BY GEOGRAPHY

12.1 INTRODUCTION

The global demand for cosmetic packaging machinery is projected to rise at a CAGR of XX% through 2018 to reach \$XX million. The effects of recession have negatively impacted the packaging consumption; but, at the same time, it has been favorable for the growth of the packaging equipment. As a result of recession there was a change in the consumers' taste and preferences that was reflected in their purchasing behavior. The growth sales of the cosmetic packaging machinery will be driven by the increased manufacturing of the cosmetic products. Growth in the developing nations will be the prevailing force behind progress in the global market for cosmetic packaging equipment. Asia-Pacific will be the fastest growing market through 2018. In China, the growth is driven by rise in the demand of cosmetic products and increasing production of these products. India and Japan are also estimated to record a high profit in the future.

TABLE 3

COSMETIC PACKAGING MACHINERY MARKET VALUE, BY GEOGRAPHY, 2011–2018 (\$MILLION)

Region	2011	2012	2013-e	2018-p	CAGR% (2013–2018)
North America	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX
Asia-Pacific	XX	XX	XX	XX	XX
ROW	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

e - Estimated; p - Projected

Source: Related Research Publication, Government Publication, Company Press Release, Company Annual Report, Company Website, Company Publication, and MarketsandMarkets Analysis

13 COSMETIC PACKAGING – COMPETITIVE LANDSCAPE

13.1 INTRODUCTION

This section represents the trend of key growth strategies adopted by the leading players in the cosmetic packaging market. The major strategies identified are:

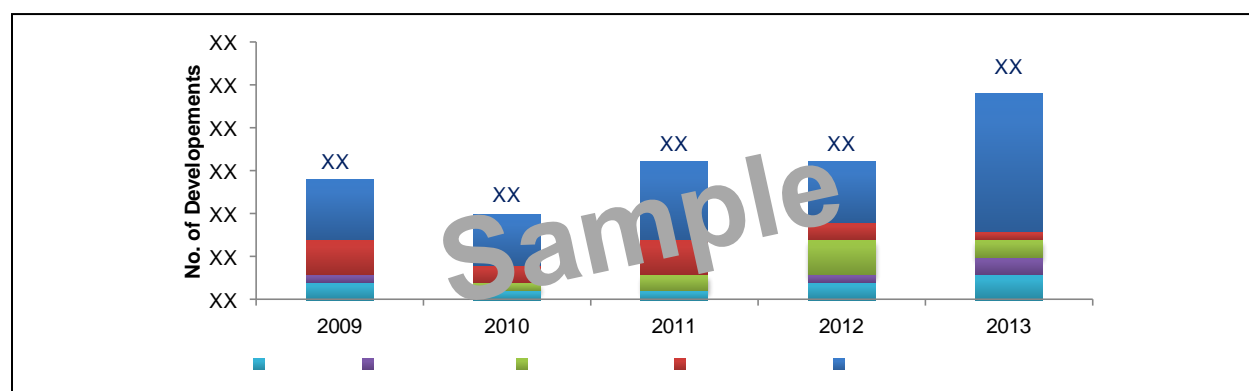
- New Product Launches
- Agreements
- Acquisitions
- Expansions
- Others (Partnerships, New Technology Launches, Investments, etc.)

The leading companies in the cosmetic packaging market include Albea Group (France), Cosmopak U.S.A. LLC (U.S.), AptarGroup Inc. (U.S.), HCP Packaging Co. Ltd (China), etc.

13.1.1 NEW PRODUCT LAUNCHES—MOST PREFERRED STRATEGIC APPROACH

FIGURE 11

COSMETIC PACKAGING: KEY DEVELOPMENTS, 2009-2013



Source: MarketsandMarkets Analysis

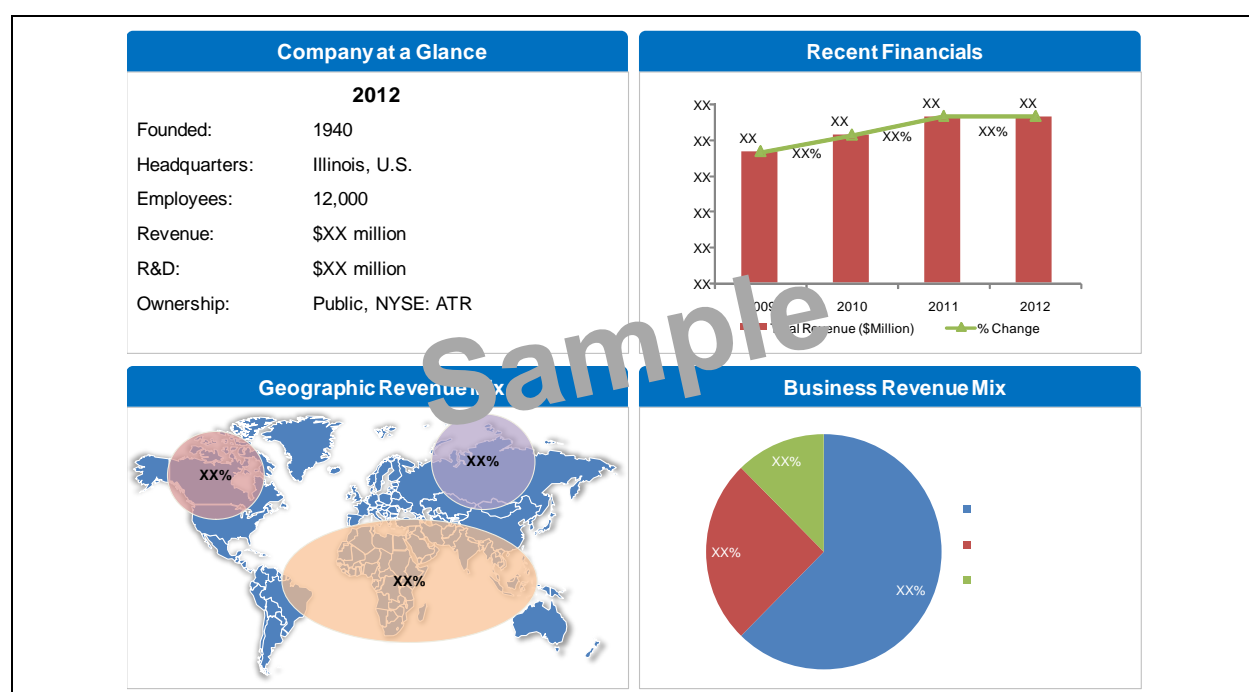
14 COMPANY PROFILE

14.1 COSMETIC PACKAGING

14.1.1 APTARGROUP INC.

14.1.1.1 Overview

AptarGroup Inc. is a packaging company involved in manufacturing and selling of dispensing systems for various industries and products. The company operates through three segments including Beauty + Home, Pharma, and Food + Beverage. The Beauty + Home segment is engaged in selling pumps, closures, etc. to the personal care and home care markets, and pumps and decorative components to the beauty market. The company operates in 20 countries through its manufacturing facilities located in North America, Europe, Asia, and South America. The main competitors of the company are HCP Packaging Group (China) and Albea Group (France).



Source: Company Publication and MarketsandMarkets Analysis

14.1.1.2 Products & Services

AptarGroup offers a wide array of products in the beauty segment.

TABLE 4

APTARGROUP: PRODUCTS & THEIR DESCRIPTIONS

Category	Product	Description
Skin care pumps <1 CC	Evolution	The product is used for facial care & cosmetics with compatibility with all creams. It has low profile design with ergonomic shape.
	Evocation	The product has a sharper design and uses the Evolution engine. It has low profile design.
	Evolux	The product has elegance and purity of metal and gives soft and smooth feel on actuation.
	Evolux eyes and lips	The product is used for micro dosage with ultra precision for eye & lip products.
	Classic line	The product has timeless design and superior quality. It can be used for wide range of dosages and has excellent compatibility.
	Metropolitan	The product has high quality design and has ergonomic handling especially for small containers. It can be used for wide range of dosages.
	Cremosa	The product has elegant and ergonomic shape for optimum comfort. It has sophisticated design and can be used for wide range of dosages.
	PAV	The product works well with viscous products and has wide range of screw closure options.
	PAV/U	The product has up-locking system for easy portability.
	PZ3	The product has low profile design with ergonomic shape. It is

Category	Product	Description
		compatible with facial care creams, foundations, gels, and oils. It has an external spring version for no contact between the cream and the metal.
	BC/EC	It is soft actuation pump for all types of formulas. It gives fast priming even with viscous products.
	Modulart	The product has a unique design with a dynamic locking system. It is easy to customize by changing the collar. It can be used for viscous products.
	Irresistible	The product gives absolute protection for the preservative free formulas. It has the patented ultra-gate technology.
	Satine	The product is used for facial and body creams. It is available in straight or rounded design.
Skin care pumps 1 CC+	EuroFlow	The standard lotion pump with patented EuroFlow technology assures reliable, consistent dosage in a familiar, user-friendly design. It is ideal for wide range of high-viscosity products.
	GS Twist & Lock	The product offers a variety of dispensing lotion pumps with a wide choice of aesthetic options and finishes.
Skin care closures	Snap Top	The product is widely used in the personal care and household markets. It provides advanced functionality and contains a broad variety of dispensing closure.
	Tube Top	The product offers one-hand convenience for tubes and inverted packaging. It is available with SimpliSqueeze valve technology for added control.
	Disc Top	It is suitable for personal care products. The closure provides simple elegance along with functional design.
Skin care valves	Vertical	This valve gives superior performance with ultra high-speed pressure-filling. It has reliability with exceptional spray performance.
	Bag On Valve	This valve holds the product separate from the propellant,

Category	Product	Description
		assuring product purity. It is fast-filling and uses compressed air or nitrogen outside the bag for eco-friendly dispensing.
	Accessories	The company offers wide variety of aerosol accessories including small and functional or bold and fashionable to meet the required dispensing characteristics.
	20mm	This vertical-action valve provides better performance with ultra-rapid filling and has reliability with exceptional spray performance. It is ideal for travel packages or promotion.
	Toggle	Toggle Action valve is easy to use. It has high-speed pressure-filling design with constant performance for the complete package.
Color cosmetics	Evolution	The product is used for facial care & cosmetics with compatibility with all creams. It has low profile design with ergonomic shape.
	Evocation	The product has a sharper design and uses the Evolution engine. It has low profile design.
	Pinpoint	The product is ideal for anti-aging treatments and targeted skin treatments. It is offered as a complete package with decorating and cap options.
	Ribbontip	The product is used for nail care, cosmetic concealers, and facial treatments. It is offered as a complete package with decorating and cap options.
	Evolux	The product has elegance and purity of metal and gives soft and smooth feel on actuation.
	Evolux eyes and lips	The product is used for micro dosage with ultra precision for eye & lip products. It is a soft feeling pump.
	PAV	The product works well with viscous products and has wide range of screw closure options.
	PAV/U	The product has up-locking system for easy portability.

Category	Product	Description
Complete package	Ergopack	The product is easy to fill and available in various decorating options.
	Pinpoint	The product is ideal for anti-aging and targeted skin treatments. It is offered as a complete package with decorating and cap options.
	Ribbontip	The product is used for nail care, cosmetic concealers, and facial treatments. It is offered as a complete package with decorating and cap options.
	Bottles and Jars	The company offers various bottles from standard or custom lines. Bottles can combine with all types of closures, pumps, and over caps. The company also offers a standard 50ml jar with a refillable insert.
	Custom products	The company offers a complete solution for customized products such as jars, bottles, over caps, and plastic actuators integrated on pumps.
Airless package	Serumony	It is an advanced product that can dispense serums in a sophisticated airless pen. It offers one touch dispensing. It is compact and hygienic that protects against oxidation and is spill-proof and leak-proof.
	Collection Privée	The product is available in various textile-like patterns.
	Eden	It is a plastic airless system that offers soft and smooth actuation. The leak-proof dispenser is completely recyclable. It also allows easy top-filling and is available in various sizes.
	Auriga City	It is a practical and easy to use product. It has a cap-free pump, 360° dispensing, and a lockable actuator option.
	Auriga	The product is ideal for a unique pack. It has elegant finish and wide range of decorating options.
	Oh My Cap!	The product offers new decorating technologies that can be

Category	Product	Description
		customized and which enhance the product.
	Albion	The product has the combination of efficacy, aesthetics, and controlled dosage.
	Aura	The product is a luxurious oval package. It has flawless design with elegant finish
	Digital	The product has precise and smooth application. It is ideal for targeted product delivery. It has Bi-injected actuator with soft tip.
	Sirius	The product is available in wide variety and can be used for viscous formulas.
	Titan	The product is an airless solution with masculine design. It has wide actuator option that is easy to dispense.
	Orion	The product gives protection for generous formulas. It is a larger package with higher dosage. It is easy to fill through the top.
	Omega 2	The product is a dual dispensing system that has single and double barrel actuator options. It is oval in shape.
	Airless Filling Equipment	The company offers under-vacuum filling machines that provide maximum product protection. These machines are ideal for the entire airless range and enable filling of high viscosity creams.

Source: Company Publication and MarketsandMarkets Analysis

14.1.1.3 Strategy & Insights

The core strategy of the company is innovation which is done by continuously strengthening their R&D facility. This is supported by long-term relationship with a network of partners. The company focuses on developing innovative delivery systems, designed specifically for the Beauty + Home industry. The company is involved in acquisition of expertise in other markets to provide creative range of products and services to their customers. The company's

production and sales are organized on regional basis covering North America, Asia, Europe, and Latin America, with the support of dedicated global and local development teams.

14.1.1.4 Developments

Date	Approach	Description
June 2012	New product launch	AptarGroup launched four package options in the Eden range that has exclusive decorating technique for greater customization. The new and advanced decorating technique for their slim range of airless packaging is for customizing the beauty products.
March 2012	Agreement	SAMPAR (Paris) selected Aptar Beauty + Home's 50 ml Eden Compact Jar for repackaging of their Nocturnal Line-up Mask, an anti-wrinkle cream.
January 2012	Agreement	Floressance par Nature (France) selected Aptar's Eden Slim and new Divine actuator for its two new facial skin care products. The two companies were working together to create the Divine actuator with an eminently feminine design, elegant curves, and shiny finish.
November 2011	Agreement	BIOMARIS (Germany) selected Aptar Beauty + Home's airless packaging collection, Eden, for their new skin care range.
November 2011	Agreement	Guerlain (France) selected Aptar Beauty + Home's Albion 30 Slim for its new skincare product, Orchidée Impériale Serum. Guerlain combined the expertise of Auriplast (France) with Aptar to develop a tailor-made luxury bottle for their new product.
November 2011	Agreement	AZZARO (Paris) selected the Inspiration pump of Aptar Beauty + Home for its new JOLIE ROSE fragrance. The inspiration pump fits in with the overall design of the bottle.
October 2011	New product launch	Aptar launched an innovative, patented concept, Magic Inside that enables the attachment of the decorative element to the dip tube inside the bottle.

Date	Approach	Description
May 2011	New product launch	Aptar's Beauty + Home segment launched the new Eden 30ml Slim in the recyclable airless packages range. The new product is more slender and absolutely feminine, mainly manufactured for women's skin care market.
March 2011	Agreement	Aptar designed the seamless packaging of Swarovski's (Austria) new fragrance. Swarovski collaborated with Clarins Fragrance Group (Canada) for launching their very first fragrance, Aura.
February 2011	Collaboration	Diptyque (Paris), a perfume company, collaborated with Aptar for the design of their new eau de toilette bottle for 50 ml and 100 ml.
October 2010	Agreement	Oriflame (Luxembourg) selected Aptar's Pinpoint applicator for its new moisturizing and firming eye cream. Pinpoint adapts to small diameter tubes and the controlled high-precision dispensing in an easy to use and optimized way.

Source: Company Press Release, Company Annual Report, Company Website, Company Publications, and MarketsandMarkets Analysis

14.2 COSMETIC PACKAGING MACHINERY

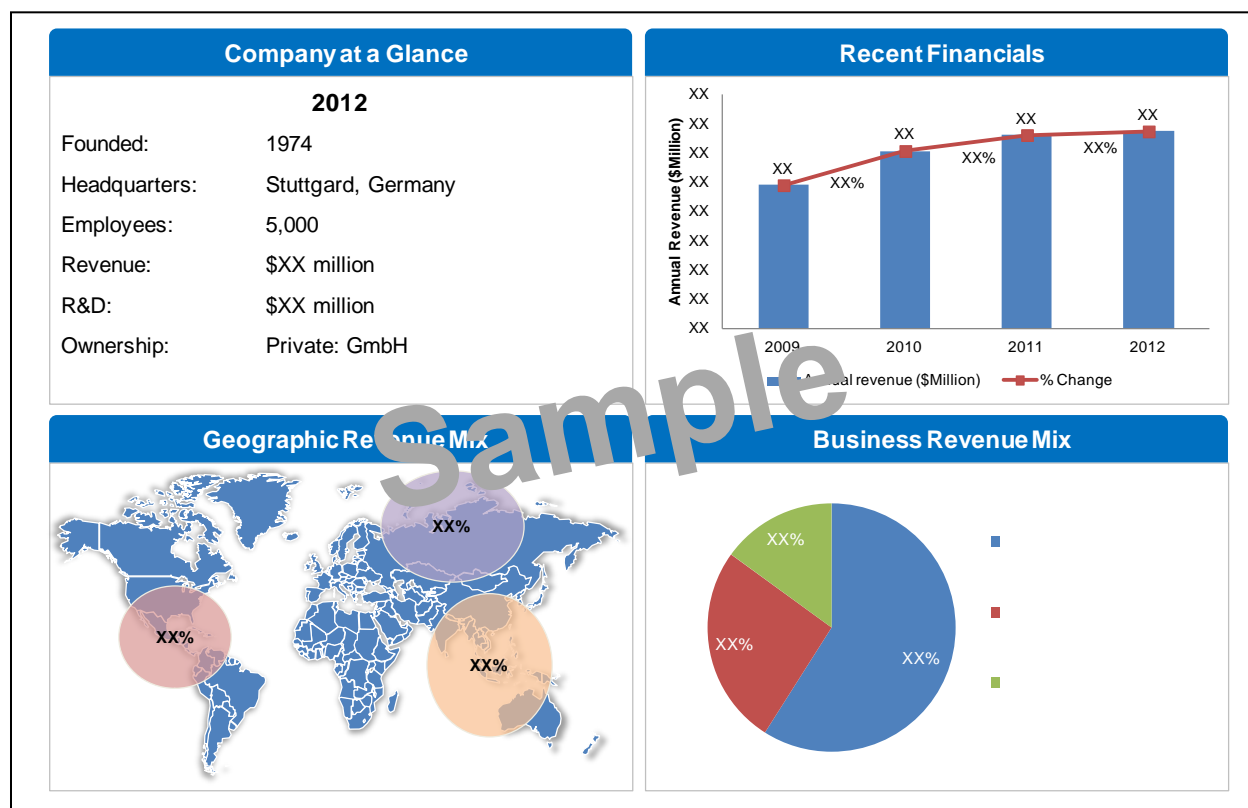
14.2.1 BOSCH PACKAGING TECHNOLOGY

14.2.1.1 Overview

Bosch Packaging Technology is a division of Robert Bosch GmbH (Germany), one of the leading suppliers of process and packaging technology. Robert Bosch operates through three business segments including automotive technology, industrial technology, and consumer goods and building technology. The industrial technology segment includes the packaging technology.

Bosch Packaging Technology offers a complete solution for all the components that are required in packaging and filling processes. The company provides its products to various industries including pharmaceutical, biopharmaceutical, and fine chemicals, medical devices and diagnostics, food and confectionery, and other industries such as home care, personal and beauty care, technical products, etc.

The company operates in over 30 locations in more than 15 countries, worldwide. The company also has manufacturing facilities in about 17 countries, worldwide. The main competitors of the company include IMA Industries (Italy) and Turbofil Packaging Machine LLC. (U.S.).



Source: Company Publication and MarketsandMarkets Analysis

14.2.1.2 Products & Services

The company offers wide range of products through the other industries division.

TABLE 5

BOSCH: PRODUCTS & THEIR DESCRIPTIONS

Category	Product	Description
Pick and place robotics	Paloma D2	The machine is used in the packaging lines to pick and place products in cartons, flow wrappers etc.
Horizontal flow wrapping	Doboy Stratus SK	They are wrapping machines used for a variety of products with output ranging from 90ppm to 450ppm.
	Pack 101	
	Pack 301 IN	

Category	Product	Description
	Pack 201	
	Sigpack HSL- Longdwell	
Vertical forming, filling & sealing	Sigpack RA/KG4	They are vertical filling and sealing machines for stick and pouch packaging.
	Sigpack RN/KG3	
Filling & closing for bottles	FLD	The different filling and closing machines used for bottle type of packaging.
	FLK	
	FRK	
	VLM	
	VRM	

Source: Company Publication and MarketsandMarkets Analysis

14.2.1.3 Strategies & Insights

Bosch focuses to capitalize on the increasing global packaging machinery market. The company is expanding globally through acquisitions of various companies. They are also opening new manufacturing facilities in locations with strong growth potential. The company aims to have a strong international manufacturing network particularly in the growing markets of developing countries.

14.2.1.4 Developments

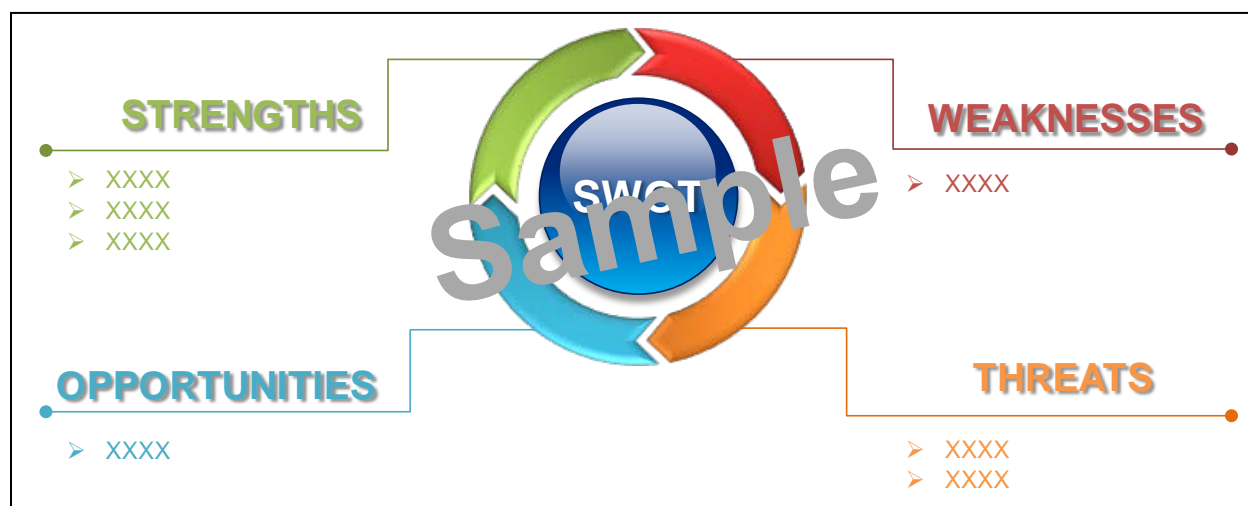
Date	Approach	Description
June 2013	Acquisition	Bosch Packaging acquired Tesco Machines et Systemes S.A.S (France) that manufactures and offers machinery for producing and filling PET bottles.
March 2013	Expansion	Bosch Packaging opened a new facility in Cairo, Egypt to satisfy the growing demands of the Egyptian market and to serve the African and Middle Eastern markets.
August 2012	Expansion	Bosch Packaging invested \$XX million to open a new manufacturing facility in Goa, India to satisfy the growing demand for packaging market in India.

Source: Company Press Release, Company Annual Report, Company Website, Company Publications, and MarketsandMarkets Analysis

14.2.1.5 SWOT Analysis

FIGURE 12

BOSCH PACKAGING TECHNOLOGY: SWOT ANALYSIS



Source: MarketsandMarkets Analysis

Bosch Packaging Technology continued to enhance its international presence. The company operates in more than 15 countries worldwide. The company is expanding through acquisition. The company is expanding its business in Asia as it is expected to generate more revenue from the region in the future. The company is expanding its business, globally. Lack of government support in the business may hamper the growth of the company. The company has to follow the regulation of the country in which it is running its business. The lack of allowances from the government and highly variable raw material prices are the biggest threats for any company. This may result in low profit margin of the company.

Disclaimer: MarketsandMarkets strategic analysis services are limited publications containing valuable market information provided to a select group of customers in response to orders. Our customers acknowledge, when ordering, that MarketsandMarkets strategic analysis services are for our customers' internal use and not for general publication or disclosure to third parties. Quantitative market information is based primarily on interviews and therefore, is subject to fluctuation.

MarketsandMarkets does not endorse any vendor, product or service depicted in its research publications. MarketsandMarkets strategic analysis publications consist of the opinions of MarketsandMarkets' research and should not be construed as statements of fact. MarketsandMarkets disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

MarketsandMarkets takes no responsibility for any incorrect information supplied to us by manufacturers or users.

All trademarks, copyrights and other forms of intellectual property belong to their respective owners and may be protected by copyright. Under no circumstance may any of these be reproduced in any form without the prior written agreement of their owner.

No part of this strategic analysis service may be given, lent, resold or disclosed to non-customers without written permission.

Reproduction and/or transmission in any form and by any means including photocopying, mechanical, electronic, recording or otherwise, without the permission of the publisher is prohibited.

For information regarding permission, contact:

Tel: 1-888-600-6441

Email: sales@marketsandmarkets.com