

Cosmetic Packaging Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The cosmetic packaging market will witness a CAGR of 3.7% over the forecast period. Packaging in the cosmetic industry has gone leaps and bounds in recent years. The cosmetic industry has the most varied packaging requirements among the other sectors. The materials used vary from different metals from glass, paper, and Plastics, and these materials can make containers with different shapes and sizes and dispensing mechanisms.

Key Highlights

Plastic in primary containers, secondary flexible pouches, caps, closures, and the nozzle is one of the cosmetic industry's primary packaging materials. The plastic tube is one of the significant containers in the cosmetic industry as it can store liquid-solid and semisolid materials and dispense products in controlled proportions. Also, compared to other container tubes, it can provide better contamination protection.

Various suppliers have devised innovative offerings to cater to the increasing tube demand. Sally Hansen, a major cosmetics manufacturer in the global market, developed a squeezable tube paired with an applicator tip with Topline's help. Additionally, Albea, a packaging solution provider, developed a Teardrop tube with a drop-by-drop dispensing system for liquid formulations. Also, Cosmogen offered a revised tube version of its Squeeze'N Roll package with an attached massage roller. Furthermore, Global Packaging Inc. had also developed a tube with a ratchet on the head of the tube and a corresponding ratchet on the pump, ensuring a perfect leakproof assembly by applying the predetermined torque while protecting the accidental opening.

Enterprises are also looking to drive the change with a plan to combat climate change and reduce the environmental impacts of packaging. For instance, Stora Enso introduced barrier-coated, grease-resistant paperboard tubes for cosmetics packaging. This tube packaging method is suitable for the primary packaging of skin cream products and is considered a new, climate-friendly alternative to plastic tubes. But the cosmetics industry now seems united on reducing the impact of plastic pollution with new thoughtful packaging strategies and advanced formulations.

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Fluctuation of the raw material prices can hinder the growth of the market. Post-Covid, the manufacturing and packaging company is facing the issue of high raw material costs due to the disruption.

Besides, several cosmetic packaging exhibitions and trade shows promote various new packaging technologies. For example, Cosmo Tech Expo is India's most significant manufacturing solutions trade show for the cosmetic, personal care, perfumery, and toiletries markets. The expo brings exhibitors to display the latest ingredients, raw materials, packaging, labeling, machinery, OEM and private labeling, testing, lab equipment, and regulatory solutions offered by over 8,000 manufacturers worldwide. Similarly, CPNA (Cosmoprof North America) is the most awarded B2B beauty event in the Americas. CPNA has been recognized as the premier launching platform for new beauty brands, offering unique, innovative products and gathering information about new distribution channels, packaging, and manufacturing solutions.

With the outbreak of COVID-19, several premium beauty product outlets were shut down. Some of these stores will never open again, and new openings will get delayed for at least a year. While brick-and-mortar drugstores and mass-market and grocery stores remain open, their customer traffic and revenues have plummeted. However, some beauty-product brands and retailers with inventory and shipment operations ready to scale up report e-commerce sales significantly higher than the pre-COVID-19 levels.

Cosmetic Packaging Market Trends

Plastic is Expected to Hold Significant Share

Plastic is a prominent material in cosmetic packaging due to its low cost, lightweight, flexibility, durability, and other factors. Plastics are a material of choice for manufacturing shatterproof and "no-spill" bottles, jars, tubes, caps, and closures for personal care products. According to the Packaging Machinery Manufacturers Institute (PMMI), at 61% market share, plastic packaging, such as bottles, jars, compacts, and tubes, dominate in cosmetics and other personal care products, where bottles are the most commonly used containers, accounting for 30% of the market. The most common and least expensive cosmetic bottles produced from HDPE are economical, impact-resistant, and maintain a sound moisture barrier. Lotion bottles come in all different sizes and forms, and some lotions remain in capped tubes.

Moreover, the most common type of plastic used for cosmetic containers is PP plastics. However, these can also come in more affordable PET or higher-end acrylic plastic. Acrylic plastic is usually transparent and resembles glass. This material has an advantage over glass as it is not prone to breakage. However, PP plastic is more affordable than acrylic and usually comes in round or tube-like shaped plastic containers. PP plastic containers can be molded into heart shapes, character shapes, or square shapes to suit the cosmetic product's style or marketing to get distributed. Companies primarily use jars and pots for face creams, lotions, foundations, lip balms, powders, and other cosmetics, where the size ranges from 20mm to 60mm and can hold anywhere from 25 ml (or less) to 250 ml.

For instance, SKS Bottle & Packaging Inc. offers various plastic jars in different sizes with multiple closure options, from silver caps with siflers lined caps to the plastic dome. They provide PET jars for products, such as lip balm and eye cream, and white polypropylene thick wall jars with lined caps for lotions, balms, etc., with many more ranges.

Design experts have favored tubular packaging for a long seeking to capitalize on tubes' convenience and portability to hold cosmetics and other personal care items. For instance, introducing Vaseline Jelly in a flip-cap jar and Dove's Advanced Hair Series Dry Oil Shampoo in a squeezable plastic tube in the UAE facilitated convenient usage.

As manufacturers seek options to reduce the amount of material used per product, plastics deliver exceptional gains in providing lightweight packaging solutions that use fewer materials. Moreover, over the last decade, plastic's environmental impacts have slowed the segment's slowdown.

However, the availability of recycled plastics and innovations in material technology have enabled environmentally-friendly packaging solutions. The players focus on refillable packaging as a design solution to create sustainable features. Brands are embracing the natural discoloration that provides PCR (post-consumer recycled) plastics. These refillable products are bridging

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this gap at the luxury end of the market.

According to data released in May 2022, the use of plastics for packaging will triple by 2060, surpassing 380 million tons. Packaging is forecast to account for 31% of global plastics use that year.

North America is Expected to Significant Share

The US is one of the biggest markets for cosmetics, personal care products, and fragrances market. Players like L'Oreal, Unilever, Procter & Gamble Co., and other leading brands have dominated the country's cosmetics market. Similarly, the cosmetic packaging landscape in the country gets consolidated with a few significant players like Albea SA, AptarGroup Inc., Smurfit Kappa Group PLC, WestRock Co., and Graphic Packaging Holding Co. dominating market share.

The country's primary product categories include skincare, makeup, haircare, perfumes, deodorants and toiletries, and oral cosmetics. The US cosmetics market is experiencing a growing demand for premiumization, in line with the global trend. It, in turn, drives the need for innovative and premium packaging. In sync with the premiumization demands and intense focus on innovative and decorative packaging, Aptar Group Inc. acquired Fusion Packaging to expand its differentiated design and decorative offerings for the cosmetics segment.

The US is also experiencing an increased use of e-commerce channels to procure personal care products by consumers. While the share of online sales remains low, it is expected to grow during the forecast period. Furthermore, Unilever has made new acquisitions based on selling products through online channels. Plastic and glass bottles are the most preferred packaging materials for skincare products. Hence, with this product category's growth, the use of materials is also expected to experience a positive growth trajectory.

In plastics, PP, PE, HPE, PET, and acrylic ingredients are the most preferred materials for plastic bottles. The increasing use of online channels will grow cheaper and safer plastics to transport than glass. Additionally, the US consumer market is experiencing a demand for beauty products categorized as natural, driven by consumer perception of these products being safer. On this account, the US government has proposed a new bill to regulate products before labeling them as natural. It will likely lead to more detailed labeling of ingredients before labeling them as natural.

Cosmetic Packaging Market Competitor Analysis

The cosmetic packaging market is highly competitive and comprises several global and regional players. Innovation and ease in deployment and usage, leading to end-to-end customer satisfaction through the product, have been the key factors driving product innovation and strategies among the market players. The key players are Silgan Holdings Inc. and DS Smith PLC.

March 2022 - During the MakeUp in Los Angeles tradeshow, WWP Beauty, a premier full-service provider to the international beauty industry, unveiled a lineup of fresh and environmentally friendly turnkey, packaging, and accessory collections.

July 2022 - Quadpack launched recyclable stick packaging for the solids market. Beauty packaging manufacturer Quadpack has launched a new packaging range for solid cosmetic stick formulas.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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