Europe Plastic Caps And Closures - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

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Report description:

Europe Plastic Caps And Closures Market Analysis

The Europe plastic caps and closures market was valued at 2.02 million tonnes in 2025 and estimated to grow from 2.09 million tonnes in 2026 to reach 2.45 million tonnes by 2031, at a CAGR of 3.25% during the forecast period (2026-2031).Regulatory momentum under the Packaging and Packaging Waste Regulation (PPWR) drives steady volume expansion as recycled-content mandates tighten. Lightweighting programs that trim 15-20% resin per cap, heightened brand-owner scrutiny of supply-chain carbon footprints, and premiumization of spirits and cosmetics packaging collectively sustain demand resilience. Capital expenditure on tethered-cap retrofits, estimated at EUR 300 million across the region, accelerates technology refresh cycles and favors manufacturers with advanced injection-molding capabilities. Meanwhile, recycled-resin shortages and deposit-return-scheme (DRS) roll-outs channel beverage volumes into aluminum alternatives, tempering upside but not derailing the overall growth trajectory. Competitive intensity remains moderate, with material innovation and smart-closure functionality serving as primary differentiation levers.

Europe Plastic Caps And Closures Market Trends and Insights

Lightweighting mandates drive material innovation

The PPWR compels converters to shave resin weight while safeguarding performance, prompting polymer-blend experimentation and precision-mold design updates that collectively cut average cap weight to 0.8 g without performance loss. Converter gross margins, already under pressure from resin volatility, narrow below 8%, pushing tier-one players toward vertical integration and captive recycling loops for supply security. PET-oriented lightweighting gains align with a 4.39% CAGR for that polymer class, aided by orientation technologies that permit 0.8 mm sidewalls. ISO 11469 and EN 13427 compliance hurdles elevate R&D thresholds and consolidate share in favor of incumbents with deep materials expertise. Over the medium term, lightweighting is expected to add roughly 0.8 percentage points to the forecast CAGR.

Tethered cap compliance reshapes production economics

From July 2024, every beverage container up to 3 L must feature a tethered closure, triggering retrofits on roughly 1,350 European bottling lines priced at EUR 150,000-300,000 each.Tetra Pak's EUR 300 million investment delivered more than 12 billion compliant caps by mid-2024. Harmonized standard EN 17665:2022+A1:2023 offers a clear compliance pathway that favors injection-molded hinge solutions and mitigates regulatory ambiguity. Consumer research shows 73% acceptance based on environmental benefits, easing brand-owner transition risks. Short-term implementation lifts demand by 1.2 percentage points but also raises capital barriers for smaller competitors.

Stand-up pouches disrupt household chemical packaging

Flexible packaging captures 15-20% annual share from rigid HDPE bottles in detergents and cleaners, courtesy of 60% material savings and strong shelf appeal.Brand-owner trials in Germany and France verify 68% consumer acceptance for pouches in budget and mid-tier SKUs. Closure demand in household chemicals could decline 8-12% through 2030, trimming the overall CAGR by 0.7 percentage points as converters pivot toward spouted pouch fitments.

Other drivers and restraints analyzed in the detailed report include:

Aseptic packaging evolution in dairy RTD segmentBrand-owner shift toward recycled-content capsDeposit-return schemes favor alternative packaging

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Polypropylene leads the Europe plastic caps and closures market with 44.38% share in 2025 due to versatile chemical resistance and attractive cost-to-performance ratios. The segment serves beverages, food, and household chemicals at scale, capitalizing on established supply logistics and mature injection-molding infrastructure. Lightweighting initiatives that cut PP usage by 10-15% per unit lock in cost advantages even as resin prices fluctuate.

Polyethylene terephthalate follows as the fastest mover at a 4.28% CAGR through 2031, propelled by lightweight profiles and robust barrier characteristics that align with tethered-cap and aseptic dairy applications. The Europe plastic caps and closures market size for PET is projected to climb in tandem with its recycled-content credentials, especially as chemical recycling gains regulatory approvals. LDPE and HDPE retain relevance in flexible dispensing and chemical-resistant niches, while PVC continues to lose ground under sustainability pressure.

Standard screw caps maintain the largest footprint at 47.10% of 2025 volumes as universal compatibility and high-speed line efficiency keep per-unit economics compelling. The Europe plastic caps and closures market share for screw caps, however, is likely to edge lower as specialized formats proliferate.

Child-resistant closures enjoy a 4.32% CAGR through 2031, buoyed by expanding pharmaceutical capacity and tightening safety codes across nutraceuticals and cannabis products. Dispensing closures experience renewed momentum in personal-care and e-commerce refill ecosystems, leveraging precision dosing mechanisms. Snap-on and specialty sports caps address on-the-go beverage needs, while tamper-evident seals embed authentication chips to curb counterfeits in premium spirits.

The Europe Plastic Caps and Closures Market Report is Segmented by Material Type (Polyethylene Terephthalate (PET), Polypropylene (PP), and More), Product Type (Screw Caps, Snap-On Caps, and More), Manufacturing Type (Injection Molding, Compression Molding, Blow Molding), End-User Industry (Beverage, Food, Pharmaceutical and Healthcare, and More), and Geography. The Market Forecasts are Provided in Terms of Volume (Tonnes).

List of Companies Covered in this Report:

BERICAP GmbH and Co. KG Guala Closures Group Pelliconi and C. S.p.A. UNITED CAPS Luxembourg S.A. Closure Systems International Europe GmbH AptarGroup Inc. Amcor plc ALPLA Werke Alwin Lehner GmbH and Co KG Georg Menshen GmbH and Co. KG Weener Plastics Group Tetra Pak International S.A. Coral Products PLC Greiner Packaging International GmbH Logoplaste Pano Cap Europe Ltd.

Additional Benefits:

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

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