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Personal Care Packaging Thrives on New Regulations, Growing Markets

Categories including sun care, men's and travel are driving an increase in packaging innovations and re-designs. And thanks to industry suppliers, bright colors, sharp graphics, a range of shapes and sizes, and smart dispensing systems stand out visibly on shelves.

Written by **Jamie Matusow, Editor**

The market that was once defined mostly by white toothpaste tubes, rigid brown bottles of suntan lotion and moisturizers with simple pump dispensers has matured rapidly, keeping pace with the upscale looks and sophisticated delivery systems that have played an important role in skin care's boom—and in consumers' preference for an upscale look in all their product purchases, from prestige to mass.

Vibrant shades of blue and yellow, color-coding, and a wide range of shapes, sizes and materials are now defining packaging for even basic skin care necessities. The growing appearance of convenient sprays and compressed sizes has altered the look on store shelves, with familiar products in somewhat unfamiliar packages—but ones which have been quickly welcomed by consumers throughout the world.

Why the sudden flux of products in the personal care space?

Industry experts say, for starters, consumers have increased their spending and desire for new products in a number of personal care categories including body care, sun care, men's grooming and travel-size products.

At Kaufman Container, marketing director, Rebecca Holland, says they have seen an increase among their customer base in the personal and sun care marketplace, which, she says, is hopefully indicative of an overall improving economy. "Some of our customers have been working to rebrand their existing lines, creating better ingredients and solutions for the consumers while sticking with a name and product the consumers are already familiar with. Others are establishing brand new lines, or adding line extensions to their existing product offerings as the marketplace seems to slowly be picking up. We've even noticed our customers aren't afraid to build custom molds if an existing stock option doesn't already exist, which is always a good sign of their commitment to the product and the economy."

Jim Farley, VP of global business development at World Wide Packaging, also notes an emphasis on re-branding. He says, "The personal care market continues to grow at 5% year over year; however, there is an equal amount of re-branding of existing products and a lesser amount of 'greenfield' product activities as compared to prior years. Overall we're seeing an increase in overall items launched but in smaller quantities."

Philip Brand, global marketing director, Lindal Group, sees the expansion of product lines. "It seems as if the number of launches and flankers has grown along with consumer education regarding sun protection for adults as well as for their children. With personal care products in general, there seems to be an avalanche of new product entries. As a result, more brands look to differentiate themselves via innovative packaging."

The popularity of natural products has also had its effect on personal care packaging growth. John Ulibarri, sales manager for JSN, says, "There is a swing toward more natural and organic products, with packaging that reflects this market segment style."

Trends in the Men's Market

Ian Ginsberg, president, C.O. Bigelow apothecaries, located in Greenwich Village, NY, says he has seen a rise in personal care SKUs, particularly in men's products and in sun care. And, in general, body care brands have introduced more multi-tasking products—for example, body wash that's also moisturizing, or mildly exfoliating.

When it comes to the men's market, Ginsberg says the growth can be attributed to a new sense of awareness. "Men are starting to take care of themselves more," he says. "They're starting to have their own opinions—as opposed to relying on their wives."

Ginsberg says men are adding products to their regimen. "We're seeing an abundance of new products—for hair, shaving, products for beards, even for conditioning facial hair. Some guys have never exfoliated [but are now]."

Ginsberg notes that packaging continues to play a strong role in consumer choice. "Packaging is the first thing that catches the eye—whether in retail stores or online. And people like to display nice things in their bathroom," he says.

C.O. Bigelow is known for personal care products culled from all over the world, including third-generation brands that Ginsberg says, "take a lot of pride in their packaging." Proraso, for instance, is an Italian company that was founded in 1930 by Ludovico Martelli in Florence. They produce a line of fine shaving products for men, including their flagship shaving soap made with eucalyptus.

And many more products are likely to launch, as the men's market is expected to continually speed up over the next few years.



Aerosol packaging premiumization is evident in emerging markets as well as in developed areas. Lindal Group advanced aerosol dispensing technology was selected by Germany's BB of Berlin GmbH its line of women's body spray sold throughout the Middle East.



Packaging for MD Solar Sciences sunscreen turns up the heat with brilliant colors and easy dispensing options. The sun care and skin care products are formulated to bring the best in sun damage prevention to skin care.

According to Gabriela Elani, home and personal care analyst, Mintel, "The men's personal care product market will continue to grow into 2018 (achieving sales of \$4.4 billion), largely driven by growth in product categories that have traditionally been segmented by gender, such as APDO, shaving, and shower products. Getting men to use male-specific hair care and facial skin care products continues to be a challenge; however, integrating new functional benefits into these products could help drive sales."

In body care, the overall soap/bath/shower category is becoming more segmented by gender, according to Mintel data. Men are gravitating more toward male-specific shower gel and body wash products because they offer both a masculine scent and the ability to get soap and hair care products in one multifunctional product.

Euromonitor reports that recent packaging innovations in men's care came from niche skin care players that were hoping to promote their smaller men's grooming products by linking them to other traditionally male products. For instance, the market researcher cites Headblade Inc, maker of shaving and skin care products for men with bald heads, which uses sport top bottles for its skin care products. Similarly, Facelube relies on motor oil cartons for its skin care line. "Both Headblade and Facelube are looking to pique men's attention by packaging their products in containers that look like they have nothing to do with beauty and personal care in the first place, but instead look like products they may be more familiar with, like motor oil," reports Euromonitor.



Headblade Inc, maker of shaving and skin care products for bald men, packages its products in a sport top bottle.



Proraso prides itself on its packaging for men's personal care.

Travel Sizes

Small-sized products are also experiencing growth. Euromonitor research shows that travel sizes are becoming increasingly popular as consumers opt for inexpensive sizes or favor trialing new products. Air travel restrictions have also caused a boom in mini products. Many of these products appear in packaging as luxurious as their full-size counterparts.

At SGD, mini packaging options include glass, which is being used more often now for luxury skin care and cosmetics as well as for fragrance. Sampling and travel restrictions are the two main drivers.

Sheherazade Chamlou, vice president sales & marketing at SGD North America, explains: "Traveling, whether to explore, shop or do business, is an integral part of modern life, which means travel retail is an indispensable and growing distribution network that offers strong growth and profitability." She says that in 2014, the number of airline passengers will exceed 3 billion—so for international and local brands, this translates into an equal number of potential buyers to conquer on the ground and in the air.



SGD, along with several partners, created small, convenient formats designed for traveling. The luxury items are housed in glass, thanks to new safety properties developed by SGD.

Thus, SGD recently teamed with three partners—Alkos, Bioplan and Technicaps—to develop an "anti-jet lag" set of three high-end products that can go anywhere: a "first class beauty set." The glass bottle has a plastic coating, a decorative technique that protects the glass against shock.

John Ulibarri, sales manager at JSN Cosmetic Packaging, has found that travel sizes are becoming "a popular new squeeze tube niche." He says that due to TSA air-travel regulations, "Many personal care companies are now moving from 4oz. to 3oz. sizes so their products can be included as 'carry on' when travelers are boarding airplanes."



Ocean Potion sun care plays up its skin care benefits in sophisticated packaging.

Stephen Frey, senior vice president of sales at DISC, says, "We're seeing more travel and sample size packages, which is a great way for consumers to try new products."

Sun Care

Perhaps no area of personal care has seen more activity of late than Sun Care—due largely to awareness of sun damage as well as new regulations that require additional information to be printed on the packaging.

According to Mintel's report "Sun Protection and Sunless Tanners-U.S.-November 2013," during 2008-13, the sun protection and sunless tanners market grew by 20%, and total U.S. retail sales in 2013 reached \$1.3 billion.

Kelly Kovack, co-founder of Odin New York Fragrances, founder of Beauty Matters and a principal of Brand Growth Management (BGM), says: "As an industry, we have been beating the drum on the importance of sunscreen for years. We have incorporated SPF into skin care and makeup at all price points and in all channels of distribution. However, the average consumer has still not incorporated its use into their daily skin care regime. More importantly, sun care only exists as a proper category at mass where the bulk of SPF product is sold."



Streamlined for summer travel, Chantecaille's Summer SPF set includes everything you need to stay protected and radiant.

Kovack says that in premium channels, sun care has no dedicated space and is usually only available as a line extension in some skin care brands. "This paradigm, however, seems to be on the verge of changing, with sun care truly becoming a trend in its own right," she says. "Unless you were under a rock last summer, it was hard to escape the data and serious editorial coverage on sun. Retailers at premium are considering the category in a different way, which presents a chance for someone to own the category in this channel."

Kovack says this will necessitate packaging that provides clear segmentation within the category and differentiation from skin care. "Sun products across all points of distribution from mass to prestige are pretty generic, components are the same and the color palette rarely diverges from orange, yellow and white. To maximize the opportunity, brands will need to be creative and take chances with packaging in order to adapt, carve out and own the burgeoning premium sun care category," says Kovack.



Balanced Guru's Seva Amazon body care products donate 100% of profits to Yasuni National Park in Ecuador. Bottles and jars are made with post-consumer resin, so they are recycled and 100% recyclable. Boxes are made with 100% recycled paper and are 100% recyclable, same with marketing and shipping materials. Labels are made with PLA biodegradable material. All formulations are 100% biodegradable, free of chemicals and toxins.

Ulibarri, at JSN Cosmetic Packaging, also sees the influence of regulations on an increase in packaging. He says, "With looming regulatory changes directed toward the cosmetic and personal care industries, sun care companies are especially motivated to rebrand with packaging changes."

C.O. Bigelow's Ginsberg says now that the new sun care monograph is official, "We're seeing some more fun, cooler brands come back."

Ginsberg notes that sun care is "a huge market." He also notes a trend in updated packaging in the category. "We're starting to see more convenience—aerosol sprays, pump sprays, bag technologies. And more specialization—some products are geared to face only, or oil-free, or have claims of being clearer or more water-resistant."

Becky Donner, vice president design and market insight, TricorBraun, says children's sun care has also seen a large uptick. "It has always been important to have a focus on kids—and many SKUs have been developed especially for children."

Big Changes in Compact Sizes and Dispensing Systems

Whether for sun care, men's care or other personal care items such as moisturizers, compact sizes and alternative dispensing systems have made great headway in the last couple of years.

Philip Brand, global marketing director, Lindal Group, says, "The personal care packaging industry is in the midst of a tremendous period of innovation. Changing needs—of our customers and of consumers—require us in the packaging industry to anticipate and devise platforms of the future."

Brand says a big change has been in the deodorant category, where smaller aerosol product sizes are making news. This, he says, is for a variety of reasons. "Sustainability factors into the equation for more compact deodorant packs. In certain emerging markets, where there is now a greater focus on personal well-being and hygiene, smaller and half-sized products are another format alternative to help induce product trial." Further, he says, the smaller format makes desired brand names accessible to more people.

Aerosol Body Lotions and Sprays

In addition to an increase of products in compressed sizes, a variety of sprays have also hit store shelves.

Whereas body lotions have traditionally been packaged in bottles and tubes, Unilever broke new ground when it introduced a spray format for its Vaseline Spray & Go Moisturizer, which promised to "absorb in seconds." A variety of products, from skin care to sun care have since followed suit.

Lindal's Brand, says that consumers in both developed and emerging markets "enjoy, look for and buy products with Lindal's advanced aerosol packaging." He says, "Premiumization of features, ergonomics and decoration holds great appeal at the point of sale and delivers enhanced form and function with every usage. This movement first started with luxury products and, with each year, the bar has been raised for brands in masstige and even mass market products."

Brand says in sun care packaging, this specifically relates to platforms other than the traditional squeeze tube or bottle. "Consumers want easy, precise and mess-free application of their favorite sun care product. And, of course, they are using these newer aerosol products more frequently—and making sure their kids are protected too."

Formulations are changing and so are the packaging solutions needed to dispense them. Brand says, "Our industry's innovation extends to the creation of hybrid formulations that combine several attributes, as well as new formulations that require more advanced aerosol valving."

He says one example is Lindal's Truspray technology. "This is the first aerosol solution designed to handle the highly viscous formulas used in popular personal care categories, such as deos, and cut propellant and solvent use by as much as 50 percent," says Brand. In addition, spray quality and flow rates are improved, and the reduced need for propellant allows for compact package design that saves on materials and transportation costs, and enhances easy, on-the-go usage."



Collistar's Body Anti-Age Talasso Scrub comes in a large tapered glass jar topped with a heavy agate-green colored plastic lid, embossed with the Collistar logo in gold.



To meet the demand of aerosols in the sun care market, MWV developed Aerosense, a trigger-actuated aerosol sprayer that delivers a continuous, even spray pattern.



CTL Packaging's tube for Dr. Dennis Gross Skincare Glotion features an elliptical shape to differentiate and have distinctive brand presence on the shelf.

MWV has also seen increased demand for aerosols. Kristy Hooper, category manager-global skin care, says that in both beauty care and sun care, MWV has seen a shift toward convenience. "Increasingly, consumers' on-the-go lifestyles require products that are portable, easy to use and can be securely closed without mess or fear of leaking."

Specific to sun care, Hooper says there is a marked uptick in demand for aerosols, primarily due to the ease of application. To meet the demand of aerosols in the sun care market, MWV developed Aerosense, a trigger-actuated aerosol sprayer that delivers a continuous, even spray pattern. Hooper says the design of the actuator differentiates the products with a unique shelf presence. "Aerosense also has a locking feature to prevent unexpected activation and eliminates the need for a cap, making it ideal for the typical on-the-go use you need with sun care products," says Hooper.



World Wide Packaging developed and manufactured a unique-to-client tube for a posh new line of skin crèmes from I Am Fragrance.

TricorBraun's Donner points to the emergence of more whipped body lotions, which use a bag-on-valve delivery system. She says this has been around for a long time in products such as nasal sprays and has "been such a hit in sun care." Now it's been leveraged into another category—body care. "While it's a little more expensive," says Donner, "the bag-on-valve revolutionized sun care with a continuous spray and a self-locking actuator. Its popularity has been driven by consumer convenience."

Tubes

Tubes, too, have undergone a brilliant makeover in the past few years, with everything from pumps to airless, dazzling graphics and new shapes. And its popularity continues to grow.

Fredrik Nilsson, vice president of sales at Norden/Kalix Tube Filling, says the increase in tubes reflects convenience and efficiency for manufacturers as well as consumers. "Tubes are growing in popularity due to the convenience of the package for the consumer, along with the ability of the manufacturer to produce a lot of units on a small footprint of their production floor."

He says due to tube size, decoration, closures, seal design and material, the tube is today looked at as not just a value package, but also a package that brings a sense of quality and an upscale feel to the overall product.

WWP's Farley says they've seen a shift to airless packaging as the demand for more natural based products with less additives and preservatives moves to the forefront. Airless tubes have become more mainstream; requests for airless compacts also have increased.

And new tube solutions continue to enter the market. Donner says TricorBraun now has a new package on the horizon. In a partnership with Giflor, a low-profile sustainable tube manufacturer, Tricor will be introducing a lightweight low-profile tube, which can be used for sun care, body lotion and hair care.



With packaging from DISC, Dermelect Cosmeceuticals organized their products into a 'brand family' with consistent graphics and messaging that helps the consumer understand the products' benefits.

New shapes have also popped up. Recently, CTL Packaging, USA, produced a tube for Dr. Dennis Gross Skincare Glotion. Anna Soden, director sales & marketing, CTL, says the brand utilized CTL's injection molding technology (easysupplytube) for their tubes. "They chose an elliptical shape to differentiate and have distinctive brand presence on the shelf," says Soden. "Additionally they used combination varnish to emphasize graphics and placed a silver hot stamp band on the flip top closure to provide another level of luxury. A full plastiband was placed over the closure to ensure tamper evidence."

Decorative Techniques

As mentioned, packaging for personal care has stepped up to the plate, keeping pace with its skin care cousin, not only with form and function, but also with decorative embellishments. And as personal care formulations tend to weave together more than one function, the features and benefits need to come across quickly at retail.

CTL's Soden says bright colors, metallic effects and combination varnishes are all being used in different ways to differentiate brands and create shelf impact.

At Kaufman, Holland says, "We have seen our beauty and sun care customers asking for new, innovative options for their packaging based on the types of products they are introducing to the marketplace." She says several customers are creating more sophisticated products and want their packaging to reflect that with stylish, edgy or upscale looks. "We've been asked to show them cutting edge and high-end options, not your run of the mill everyday bottle or tube. Many of our customers are trying to create an experience for the consumers and their packaging needs to embrace that feel." With that elevated consumer experience comes newer formulations, says Holland, including combining various elements that may not have been used together before. "For example," she says, "one of our customers launched a tanning product that also has an anti-aging element in order to offer multiple solutions to the customer with one product. The packaging resulted in a customized airless container that was new to this marketplace and gave a prestigious product an aesthetic to match."



CCL recently produced the packaging for Fruit of the Earth, which is using oval tubes with full coverage decoration to increase their shelf presence.

WWP's Farley offers a similar sentiment. He says, "Several years ago, KAO brands made a huge splash in the OTC category with Natural Glow, a self-tanning moisturizer that set the bar for quite some time. The retinol, BB cream, now stem cell, for anti-aging, continues to rage with newer more sophisticated formulations. The anti-aging category inherently drives elegant packaging, metallized closures, hot stamping, pearls and metallic, almost a more techno vibe, ultra-modern."

At Norden/Kalix Tube Filling, Nilsson says, "The evolution of new decoration ideas and capabilities of tubes is helping the package. The big thing today seems to be the in-mold label technology giving tubes yet another new unique look."

Stephen Frey, senior vice president of sales at DISC, says secondary packaging has been ramped up to match primary components. "During the past year," he says, "we've seen increased use of specialized coatings such as soft-touch, glitter, and spot gloss and matte UV. Using spot coatings and glitter presents points of contrast to catch the consumer's attention. Soft-touch produces tactile sensations that engage the consumer. Once they take it off the shelf, they feel the desire to take it home."

Frey says several of DISC's customers are adding new products and line extensions with SPF additives or emollients to capture a piece of this growing segment of the sun care market "This," he says, "is why many have increased the use of coatings and other decorating carton features to bring attention to product enhancements."

David Wolf, senior sales executive, DISC, provides an example: "Dermelect Cosmeceuticals recently organized their products into a 'brand family' with consistent graphics and messaging that helps the consumer understand their products' benefits. They also added spot gloss UV and soft-touch coating to enhance the look and feel of their packaging."

Tricor's Donner also notes the upgrade. She says marketers have traditionally focused on formula innovation, then packaging innovation. Now, she says there are some really cool things going on in deco—such as vibrant in-mold labels and the return of bling. "We'll see a lot more bling and glitz around this category in the future," she predicts.

Farley says World Wide Packaging recently developed and manufactured a unique-to-client tube for a posh new line of skin crèmes from I Am Fragrance, a manufacturer and supplier of fragranced luxury beauty products. The company's I Am hand crème line consists of nine set-to-mindset fragrances, including "I Am Love," "I Am Peace" and, of course, "I Am Me." The trendy line is housed in a streamlined 30mm foil polymer tube with a unique-to-client octagonal cap. Each tube contains 2oz. of product.

Color selection for the new line's packaging was both comprehensive and cooperative, says Farley. "The I Am line's mood-mindful diversity led to an unusually large number of careful decisions regarding tube color choices. World Wide Packaging worked with Product 360, I Am Fragrance's design partners, to ensure that the customer's colors complemented each crème's name and scent with an appropriate tube hue and tone. WWP provided expertise and support to guarantee the deco colors were vibrant on each tube."

"According to CCL Tube, brand managers are increasingly using shape to differentiate their products on shelves. One option that has been increasingly popular, they say, is the oval tube. CCL says there are many market forces that make ovals a preferred packaging option for sun and personal care products. One benefit is that the streamlined design communicates that a product is high end. This is a key selling point for multi-benefit and prestige brands, they say. Oval tubes have long been a favorite for the prestige market and with the growth in the personal care/sun care category, CCL says more companies are choosing ovals to increase a product's shelf appeal. Additionally, many brand managers select oval tubes because there is more visible surface area, which allows for more complex decoration.

CCL also notes that there has been a steady increase in the use of EVOH barriers in tubes. Multi-layer options are no longer seen as just for sunscreens. As the price gap between multilayer and monolayer tubes has been closing, demand has been increasing in a variety of product categories. By using the multilayer tube options, packaging engineers are able to adjust the amount of testing required during a product launch, saving money and time.

CCL recently produced the packaging for Fruit of the Earth, which is using oval tubes with full coverage decoration to increase their shelf presence. CCL says these design elements help Fruit of the Earth stand out from other sun care items in the retail market. Fruit of the Earth's oval Block Up! Sport 50 tube was produced using six color offset printing employing CCL Tube's over the shoulder and crimp through technologies. The arch shaped designer seal which cuts down on sharp edges that can snag and scratch makes it more user friendly and gives this product even more shelf presence.

Brands are also relying on the color of the product, itself, to tell an engaging story.

Marny Bielefeldt, director of marketing, Alpha Packaging, says, "One trend that we've seen especially take hold in bath and body products is the trend of using clear PET bottles across an entire brand, and differentiating the product 'flavors' simply by the color of the product inside. Since so many bath and body products are inspired by fruits and flowers, the colors of the products are often vibrant hues of purple, green, red or orange; brand owners are letting the color of the product dictate the label design, and letting clear PET showcase the beautiful liquids inside."

Bielefeldt says for brands that don't have vibrantly colored products that look good in clear PET, they are seeing more use of custom colors—particularly jewel tones and metallics—with stock bottle/jar molds. There is also an increased interest in families of stock items. She says, "One way that we make sure we're addressing this trend is to look at all of our stock lines and ensure that we're offering the full range of sizes that a company needs. For example, we have 10 sizes of Traditional Boston Rounds ranging from 1oz to 1 liter, so a company can use this line of bottles for everything from travel sizes to club store packaging—and everything in between.

Personal care and sun care brands are looking for ways to distinguish every component of their packaging, says Bielefeldt, and as a result, "our closure decoration capabilities have been highly requested over the past year." The types of decoration range from screen-printing on the top surface of closures, to applying foil bands around the circumference of the closure, to screen printing on the closure side walls. In the sun care category in particular, Bielefeldt says the use of metallic inks, hot stamping, and foil-banded closures are all popular ways to signify a high-end sun care product. "The sidewall decoration on closures is a capability that we have recently enhanced, to enable a larger print area on the closure sides. We can apply metallic inks, textured inks or other specialty inks to maximize the impact of a stock closure," she explains.

The Future of Personal Care

While personal care in general—and its growing channels of men's grooming, sun care and sampling and travel sizes—have boosted a plethora of new packaging options, the usefulness of each component must be carefully evaluated.

Lindal's Brand says, "Innovation will continue, unabated, because formulas will continue to evolve and the avalanche of retail launches will require greater differentiation as well. But, as with all 'innovation' it must serve a purpose—to build our customer's brand. New valve and actuator designs, colors and shapes all combine to create a functional sense of 'newness' that serves the brand. Novelty, for the sake of being 'different' does not advance our cause."

For more on Personal Care Packaging, please see our Online Exclusive: Top Four Personal Care Packaging Trends, from analysts at Smithers Pira. www.beautypackaging.com/articles/2013/12/online-exclusive-top-four-personal-care-packaging-

To mark the second anniversary of its signature scent, Bottega Veneta created the Luxury Bath Collection. The Luxury Body Scrub comes in a 200ml glass jar, with an intrecciato textured bottom, to add a touch of sophistication to the consumer's surface space.



The rise in premium personal care products has given new purpose to glass. According to Euromonitor, glass packaging increased by 3% in 2012, as consumers began to utilize premium beauty and personal care products again. Glass jars and bottles continued to perform strongly in 2012, growing by 3% overall in the year. The growth largely came from premium products, which have been adopting glass jars and bottles more frequently. Glass is commonly seen as an indicator of quality, as opposed to plastic bottles and jars, which are used frequently for mass-market and other economy-priced products. Despite the recession, the demand for premium products continues to rise among consumers, who see it as worth the extra expense for the higher quality.

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