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# Pharmaceutical Packaging: United States

November 2021



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# About This Report

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## Scope

This report forecasts to 2025 US pharmaceutical packaging demand in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- bottles and jars
- blister packaging
- boxes and cartons
- prefillable syringes
- parenteral vials and ampuls
- prefillable inhalers
- pouches
- IV containers
- tubes
- other products such as prescription containers, strip packs, and liquid medication cups

To illustrate historical trends, total demand and the various segments are reported at five-year intervals for 2010, 2015, and 2020.

Pharmaceutical caps and closures, labels, and packaging accessories are excluded unless otherwise stated. For the purposes of this report, pharmaceutical packaging demand is defined as the value of finished packaging products sold by merchant companies and produced or assembled internally by pharmaceutical manufacturers and contract packaging firms.

Demand for blister packaging in this report includes not only the blister component itself but also the value of the secondary folding carton, shrink wrap, and other accessories (such as tamper-evident seals or packaging inserts). In other words, it is the cost of a finished package to the drug maker (whether it is produced internally or by contract packaging firms). The blister component of the package is generally not used on its own without secondary packaging. As such, demand for boxes and cartons used in the blister packaging is excluded from secondary packaging data to avoid double counting.

US statistics for pharmaceutical packaging products include sales and production activities in Puerto Rico. Most major multinational drug makers operate one or more production facilities and consume a significant volume of packaging in that territory. In 2020, Puerto Rico accounted for approximately 40% of the value of US pharmaceutical shipments and a comparable level of pharmaceutical packaging demand.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Pharmaceutical Packaging: United States* (FF30018) is based on *Global Pharmaceutical Packaging*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 4 | NAICS & SIC Codes Related to Pharmaceutical Packaging**

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
322211	Corrugated and solid fiber box manufacturing	2652	Setup paperboard boxes
322212	Folding paperboard box manufacturing	2653	Corrugated and solid fiber boxes
326111	Plastics bag and pouch manufacturing	2657	Folding paperboard boxes
326112	Plastics packaging film and sheet (including laminated) manufacturing	2671	Paper; Coated and Laminated Packaging
326160	Plastics bottle manufacturing	2674	Uncoated Paper and Multiwall Bags
327213	Glass container manufacturing	3085	Plastics bottles
		3221	Glass containers

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis

that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Pharmaceutical Packaging*

### Freedonia Industry Studies

*Cannabis Packaging Opportunities*

*Converted Flexible Packaging*

*Corrugated & Paperboard Boxes*

*Disposable Medical Supplies*

*Global Caps & Closures*

*Global Corrugated Boxes*

*Global Disposable Medical Supplies*

*Global E-Commerce Packaging*

*Global Nonwovens*

*Global Protective Packaging*

*Medical Device Packaging*

*Nonwovens*

*Pharmaceutical Packaging*

*Plastic Film*

*Pouches*

*Protective Packaging*

*Stretch & Shrink Film*

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*Plastics News*

*Plastics Technology*

*PlasticsToday*

*QMed*

## Agencies & Associations

Aluminum Association

American Chemistry Council's Plastics Division

Association for Accessible Medicines

Consumer Healthcare Products Association

Flexible Packaging Association

International Standards Organization

Pharmaceutical Research and Manufacturers of America

United States Census Bureau

United States Food and Drug Administration

United States International Trade Commission

World Bank

World Health Organization

World Trade Organization