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Global Pharmaceutical Packaging

January 2018



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About This Report

Scope & Method

This report forecasts to 2021 global demand for pharmaceutical packaging by product and major world region in nominal US dollars at the manufacturer level. Product segments include:

- primary containers
- closures
- labels
- secondary containers
- prescription containers
- pharmaceutical packaging accessories

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions. To illustrate historical trends, world, product, and regional demand (including product segments) are provided for 2006, 2011, and 2016. Finally, global shipments are segmented by major world region and provided for 2006, 2011, 2016, and 2021.

For the purposes of this report, pharmaceutical packaging product demand is defined as the value of finished containers, closures, and accessories sold by merchant companies and produced or assembled internally by pharmaceutical manufacturers and contract packaging firms. In 2017, the estimated value of captive production by drug makers amounted to approximately 30% of total global pharmaceutical packaging demand. The remaining 70% consisted of finished containers, closures, and accessories supplied by packaging manufacturers or contract packaging firms.

This report quantifies trends in terms of compound annual growth rates (CAGRs), which, by definition, employ in their calculation only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the trend beginning in the base year and ending in the forecast year. Forecasts are developed via the identification and analysis of pertinent statistical relationships and other historical trends and events, as well as their expected impact over the forecast period. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year. For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate at that prevailing in 2016. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Global Pharmaceutical Packaging (FW30018) is based on 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 including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international 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 9 | Industry Codes Related to Pharmaceutical Packaging

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
322211	Corrugated and Solid Fiber Box Mfg	2653	Corrugated and Solid Fiber Boxes
322212	Folding Paperboard Box Mfg	2657	Folding Paperboard Boxes, Including Sanitary
323110	Commercial Lithographic Printing	2671	Packaging Paper and Plastics Film, Coated and Laminated
325412	Pharmaceutical Preparation Mfg	2674	Uncoated Paper and Multiwall Bags
326111	Plastics Bag and Pouch Mfg	2752	Commercial Printing, Lithographic
326112	Plastics Packaging Film and Sheet (including Laminated) Mfg	2834	Pharmaceutical Preparations
326160	Plastics Bottle Mfg	3069	Fabricated Rubber Products, NEC
326199	All Other Plastics Product Mfg	3085	Plastics Bottles
326299	All Other Rubber Product Mfg	3089	Plastics Products, NEC
327213	Glass Container Mfg	3221	Glass Containers
332115	Crown and Closure Mfg	3466	Crowns and Closures

Source: US Census Bureau

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Resources

The Freedonia Group

Global Pharmaceutical Packaging, January 2018

Freedonia Industry Studies

Global Caps & Closures Market, September 2017

Packaging Films Market in the US, July 2017

Pharmaceutical Packaging Market in the US, June 2017

Converted Flexible Packaging Market in the US, May 2017

Barrier Films Market in the US, April 2017

Global Labels Market, January 2017

Caps & Closures, June 2016

In Vitro Diagnostic (IVD) Packaging, June 2016

Disposable Medical Supplies, February 2016

Pouches, February 2016

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Corrugated & Paperboard Boxes: United States

Disposable Medical Supplies: United States

Global Dermatological Drugs

Global Electronic Medical Records

Healthcare: United States

Labels: United States

Medical Equipment & Supplies: United States

Nutritional Supplements: United States

Packaging: United States

Pet Medications: United States

Pharmaceuticals: United States

World Clinical Nutrition Products

World Medical Devices

Freedonia Custom Research

Trade Publications

Drug Development & Delivery

Drug Topics

FiercePharma

Flexible Packaging

Medical Device & Diagnostic Industry

Packaging Digest

Packaging Strategies

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Pharmaceutical & Medical Packaging News

Pharmaceutical Manufacturing and Packing Sourcer

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Association for Accessible Medicines

Consumer Healthcare Products Association

European Federation of Pharmaceutical Industries and Associations

European Medicines Agency

Eurostat

Flexible Packaging Association

International Monetary Fund

International Standards Organization

Organisation for Economic Co-operation and Development

Pharmaceutical and Medical Device Agency (Japan)

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