Pharmaceutical Packaging

US Industry Study with Forecasts for 2012 & 2017

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Pharmaceutical Packaging
US Industry Study with Forecasts for 2012 & 2017

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General ................................................................. 4
Macroeconomic Trends ........................................... 5
Demographic Patterns ............................................... 8
Health Care Trends ................................................ 9
Health Insurance .................................................. 10
Medical Conditions ............................................... 12
Chronic Conditions ............................................... 13
Acute Conditions .................................................. 17
National Health Expenditures ................................. 18
Medical Providers ................................................ 22
Acute Care Hospitals ........................................... 24
Outpatient Facilities .......................................... 24
Skilled Nursing Homes ..................................... 25
Home Health Care Organizations ......................... 25
Retail Pharmacies ............................................... 26
Physicians ................................................................ 27
Pharmacists ....................................................... 27
Patient Activity ...................................................... 27
Acute Care Hospital Admissions ......................... 29
Surgical Procedures ........................................... 29
Outpatient Visits .................................................. 29
Prescriptions .......................................................... 31

PHARMACEUTICAL OVERVIEW

General ................................................................. 32
Regulation ............................................................ 33
Research & Development .................................. 36
Product Shipments ............................................... 37
Therapeutic Classes ............................................ 39
Dosage Formulations ........................................ 40
Ethical Pharmaceuticals .................................... 41
OTC Pharmaceuticals ......................................... 43
Generic & Proprietary Pharmaceuticals ................. 45

MATERIALS

General ................................................................. 48
Raw Materials ..................................................... 48
Plastic Resins ....................................................... 50
High Density Polyethylene ................................. 52
Polyethylene Terephthalate ................................. 53
Polypropylene .................................................... 53
Low Density Polyethylene ................................. 54
Polyvinyl Chloride ............................................. 55
Polystyrene ....................................................... 55
Other Plastic Resins .......................................... 55
Aluminum Foil ...................................................... 56
Paper & Paperboard ........................................... 58
Glass ................................................................. 59
Other Raw Materials .......................................... 59
Semi-Finished Materials ....................................... 61
Plastic Film ........................................................ 62
Converted Paper & Paperboard ................. 63
Converted Foil .................................................... 64
Other Semi-Finished Materials ......................... 65

PRODUCT OVERVIEW

General ................................................................. 67
Pharmaceutical Packaging Product Groups ........... 69
Unit Dose Packaging ........................................... 74
Anti-Counterfeit Drug Packaging .................... 75
Historical Demand Patterns .......................... 77
US Trade ........................................................... 79
International Markets ....................................... 81

PRIMARY PHARMACEUTICAL CONTAINERS

General ................................................................. 83
Plastic Bottles ..................................................... 86
Ovals, Squares & Rounds .................................. 88
Dispensing Bottles .......................................... 91
Plastic Cans ....................................................... 93
Plastic Jars ........................................................ 94
Blister Packaging ................................................ 95
Ethical Pharmaceutical Blister Packs .............. 97
Sample Packs .................................................. 98
Unit Dose Packs .............................................. 99
OTC Blister Packs ............................................. 101
Clinical Trial Packs ......................................... 103
Materials & Components .................................. 104
Films ................................................................. 104
Lidding Materials ............................................. 106
Accessories ....................................................... 108
Equipment ....................................................... 110
Parenteral Containers ....................................... 110
Vials ................................................................. 112
Glass Vials ....................................................... 113
Plastic Vials ........................................................ 115
Prefillable Syringes .......................................... 118
Injectors ............................................................. 119
Cartridges ......................................................... 122
IV Containers .................................................... 124
Semi-Rigid Plastic IV Containers .................... 125
Mini-Bags ......................................................... 127
Glass IV Containers .......................................... 129
Ampuls .............................................................. 130
Glass Ampuls .................................................... 131
Plastic Ampuls ................................................... 132
Pharmaceutical Pouches ...................................... 133
Prefillable Inhalers ............................................ 135
Metered Dose Inhalers ...................................... 136
Applications ....................................................... 137
Producers & Devices ......................................... 138
Dry Powder Inhalers ......................................... 141
Applications ....................................................... 142
Producers & Devices ......................................... 142
Medication Tubes ............................................... 144
Composite Tubes .............................................. 146
Plastic Tubes ..................................................... 146
Metal Tubes ....................................................... 149
Other Primary Pharmaceutical Containers ........ 150
Glass Bottles & Jars .......................................... 151
Aerosol Cans .................................................... 153
Strip Packs ........................................................ 155
Paperboard Boxes ............................................ 157
All Other Primary Pharmaceutical Containers .... 159

PACKAGING ACCESSORIES

General ................................................................. 161
Pharmaceutical Closures .................................... 163

MARKETS

General ................................................................. 209
Pharmaceutical Manufacturers ......................... 211
Contract Packaging ........................................... 215
Retail Pharmacies ............................................ 215
Institutional Pharmacies .................................... 219
Other Markets .................................................. 221

INDUSTRY STRUCTURE

General ................................................................. 224
Market Share ..................................................... 227
Competitive Strategies ...................................... 228
Packaging Product Companies ......................... 229
Contract Packaging Firms .................................. 230
Mergers & Acquisitions ...................................... 231
Licensing & Related Agreements ......................... 235
Marketing & Distribution .................................. 235
Product Development Activities ......................... 238
Manufacturing Requirements .......................... 241

(continued on next page)
Table of Contents

(continued from previous page)

COMPANY PROFILES

Alcoa Incorporated ........................................... 243
Alexander (James) Corporation .......................... 244
Amcor Limited .................................................. 246
AmersourceBergen Corporation ........................... 249
AptarGroup Incorporated ................................. 252
Becton, Dickinson and Company .......................... 254
Carl-Zeiss-Stiftung ............................................ 256
Catalent Pharma Solutions .................................. 258
CCL Industries .................................................. 260
Chesapeake Corporation ..................................... 264
Clondalkin Group ............................................. 266
Constamia Packaging ........................................ 268
Gerresheimer Holdings GmbH ............................. 270
Howell (FM) & Company ................................... 272
International Paper .......................................... 273
IntraPac Corporation ......................................... 274
Kloeckner Pentaplast .......................................... 276
Mckesson Corporation ....................................... 277
MeadWestvaco Corporation ............................... 278
Menasha Corporation ......................................... 282
Mini Graphics .................................................. 284
Owens-Illinois Group .......................................... 285
Plastube North America ...................................... 286
Rexam plc ....................................................... 287
Reynolds Packaging ......................................... 291
Rio Tinto Group ............................................... 294
Ropack Incorporated ......................................... 298
Superior Group ............................................... 299
3M Company ................................................... 301
Unicep Packaging ............................................. 303
Welch Packaging ............................................. 304
West Pharmaceutical Services ............................ 305
Other Companies Mentioned in Study ................... 308

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table .............................................. 3

MARKET ENVIRONMENT

1 Macroeconomic Indicators .................................. 7
2 Population by Age Group .................................. 9
3 Chronic Conditions by Type .............................. 16
4 Acute Conditions by Type ................................ 18
5 National Health Expenditures by Type ................. 21
6 Medical Providers by Type ................................ 23
7 Patient Activity by Type .................................. 28

PHARMACEUTICAL OVERVIEW

1 Pharmaceutical Shipments by Therapeutic Class .... 38
2 Pharmaceutical Shipments by Dosage Formulation . 41
3 Ethical Pharmaceutical Shipments by Therapeutic Class ............................................. 43
4 OTC Pharmaceutical Shipments by Therapeutic Class ............................................. 45
5 Pharmaceutical Shipments by Commercial Status ................................................. 47

MATERIALS

1 Pharmaceutical Packaging Raw Material Demand by Type ............................................. 49
Ch 7 Pharmaceutical Packaging Raw Material Demand by Type, 2007 .............................. 50
2 Plastic Resin Demand in Pharmaceutical Packaging by Type ....................................... 52
3 Semi-Finished Material Demand in Pharmaceutical Packaging by Type .................... 61
Ch 7 Semi-Finished Material Demand in Pharmaceutical Packaging, 2007 .................... 62
4 Plastic Film Demand in Pharmaceutical Packaging by Type ....................................... 63
5 Converted Paper & Paperboard Demand in Pharmaceutical Packaging by Type ............ 64
6 Converted Foil Demand in Pharmaceutical Packaging .................................................. 65
7 Other Semi-Finished Material Demand in Pharmaceutical Packaging ........................ 66

PRODUCT OVERVIEW

1 Pharmaceutical Packaging Demand by Product Group ................................................. 69
Ch 7 Pharmaceutical Packaging Demand by Product Group, 2007 .................................. 73
2 Unit Dose Pharmaceutical Packaging Demand by Product Group .................................. 75
3 Anti-Counterfeit Pharmaceutical Packaging Demand by Product Group .................... 77
4 Pharmaceutical Packaging Market, 1997-2007 ......................................................... 79
5 US Trade in Pharmaceutical Packaging ................................................................. 80
6 World Pharmaceutical Packaging Demand by Region .................................................. 82

PHARMACEUTICAL CONTAINERS

1 Primary Pharmaceutical Container Demand by Product Group .................................... 85
Ch 7 Primary Pharmaceutical Container Demand by Product Group, 2007 ...................... 86
2 Plastic Pharmaceutical Bottle Demand by Type ......................................................... 88
3 Pharmaceutical Blister Packaging Demand by Type ................................................... 97
4 Parenteral Container Demand by Product Group ......................................................... 111
5 Parenteral Vial Demand by Type ................................................................. 113
6 Prefillable Syringe Demand by Type ................................................................. 119
7 IV Container Demand by Type ................................................................. 125
8 Parenteral Ampul Demand by Type ................................................................. 131
9 Pharmaceutical Pouch Demand by Type ................................................................. 135
10 Prefillable Inhaler Demand by Type ................................................................. 136

11 Medication Tube Demand by Type ................................................................. 146
12 Other Primary Pharmaceutical Container Demand by Type .................................... 151
13 Glass Pharmaceutical Bottle & Jar Demand ................................................................. 153
14 Aerosol Pharmaceutical Can Demand ................................................................. 155
15 Pharmaceutical Strip Pack Demand by Type ................................................................. 157
16 Primary Pharmaceutical Box Demand ................................................................. 158
17 Other Primary Pharmaceutical Container Demand ................................................... 160

PACKAGING ACCESSORIES

1 Pharmaceutical Packaging Accessory Demand by Product Group .................................. 162
Ch 7 Pharmaceutical Packaging Accessory Demand by Product Group, 2007 ...................... 163
2 Pharmaceutical Closure Demand by Product Group ..................................................... 164
3 Plastic Pharmaceutical Closure Demand by Type ......................................................... 166
4 Rubber & Elastomeric Pharmaceutical Closure Demand by Type .................................. 174
5 Other Pharmaceutical Closure Demand by Type ......................................................... 177
6 Secondary Pharmaceutical Container Demand by Product Group .................................. 179
Ch 7 Secondary Pharmaceutical Container Demand by Product Group, 2007 ...................... 180
7 Secondary Paperboard Pharmaceutical Box Demand .................................................... 183
8 Prescription Container Demand by Type ................................................................. 185
9 Pharmaceutical Shipping Container Demand by Type .................................................. 190
10 Other Secondary Pharmaceutical Container Demand ................................................... 193
11 Pharmaceutical Label Demand by Type ................................................................. 197
12 Pharmaceutical Package Insert Demand ................................................................. 203
13 Other Pharmaceutical Packaging Accessory Demand by Type .................................... 204

MARKETS

1 Pharmaceutical Packaging Demand by Market, 2010 .................................................. 210
Ch 7 Pharmaceutical Packaging Demand by Market, 2007 ............................................ 211
2 Pharmaceutical Manufacturing Market - Pharmaceutical Packaging Demand ............ 214
3 Contract Packaging Market - Pharmaceutical Packaging Demand .................................. 217
4 Retail Pharmacy Market - Pharmaceutical Packaging Demand .................................... 219
5 Institutional Pharmacy Market - Pharmaceutical Packaging Demand .......................... 221
6 Other Markets - Pharmaceutical Packaging Demand ................................................... 223

INDUSTRY STRUCTURE

1 US Pharmaceutical Packaging Sales by Company, 2007 ............................................. 225
Ch 7 Pharmaceutical Packaging Market Share by Company, 2007 ............................... 228
2 Selected Acquisitions & Divestitures ................................................................. 232
Prefillable containers to lead primary packaging

Demand for pharmaceutical packaging in the US will increase 5.5 percent annually to $16 billion in 2012. Demand for primary pharmaceutical containers will increase 5.2 percent annually. The fastest growth is anticipated for prefillable syringes and vials, which will expand applications as advances in biotechnology lead to the introduction of new therapies that must be injected. In spite of below average growth, plastic bottles will remain the most widely used package for oral drugs distributed in bulk and prescription dose volumes to retail and mail order pharmacies. Plastic bottles will also continue to dominate applications in OTC medicines sold in 50+ tablet and capsule quantities.

Pharmaceutical blister packaging will sustain favorable growth based on its adaptability to unit dose formats with expanded label content, high visibility, and built-in track and trace features. The market for pharmaceutical pouches will expand at a fast pace, spurred by increasing applications in the unit dose packaging of transdermal patches, powders for reconstitution, and topical creams and ointments. Prefillable inhalers will command strong growth opportunities as the number of chronic asthma, allergy and migraine patients treated with inhalation drugs rises. Ongoing improvements in aesthetic and barrier properties will keep tubes a leading primary container for topical medication.

Labels, closures to pace gains in accessories

Pharmaceutical closures will grow 6.2 percent annually through 2012. Vial stoppers, syringe tips and plastic flip-top vial closures will command the strongest growth as injectable bioengineered drugs broaden emergency care chronic disease indications. Twist and turn child-resistant caps will remain the top closures for oral and liquid drug containers, but will lose growth momentum as blister packs and pouches penetrate unit dose applications. Plastic dispensing closures will fare much better among drug makers based on ease of use and convenience in the delivery of liquid medicines and lotions. Due to marketing and security benefits, paperboard boxes will lead sales of secondary pharmaceutical containers. Demand for prescription vials will increase slowly as ethical medicines are adapted to prescription dose bottles for direct dispensing. Due to trends toward smaller-sized shipments, shipping cartons will post faster growth opportunities than corrugated shipping boxes. Demand value recorded by pharmaceutical labels will advance rapidly as drug makers change to higher-value-added types to meet pedigree regulations for combating drug counterfeiting. Demand for other packaging accessories, including shrink wrap and bands, tamper-evident seals, desiccants and packaging materials will expand with increases in pharmaceutical shipments.
MATERIALS

Paper & Paperboard

The consumption of paper and paperboard in pharmaceutical packaging products will reach $12.2 billion in 2007, an annual increase of 3.9 percent from 2006. In general, growth is associated with upward trends in pharmaceutical production, which will expand uses in secondary boxes, shipping containers, labels and package inserts. In addition, paper and paperboard will gain a number of specialty pharmaceutical packaging applications, especially in unit dose systems such as low-barrier pouches.

Leading paper and paperboard materials employed in pharmaceutical packaging applications include medical grade kraft, clay-coated board, solid bleached sulfate board and white-lined newsback. The vast majority of usage is derived from price-sensitive shipping and secondary containers. Consequently, paper and paperboard lag well behind plastics in terms of demand value.

In general, innovations in paper and paperboard for pharmaceutical applications have focused on improving graphic capabilities. For example, PRINTKOTE solid bleached sulfite paperboard developed by MeadWestvaco features a glossy finish that is well-suited to flexographic, offset and gravure printing. The material also allows for graphics of up to seven different colors. Among pharmaceutical applications served by PRINTKOTE are secondary boxes and cartons for blister packs, plastic bottles and other containers. In addition to MeadWestvaco, other producers of paper and paperboard for pharmaceutical packaging applications include International Paper, Weyerhaeuser, Georgia-Pacific, Nippon Paper Industries and Stora Enso.

### TABLE XX-00

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<td>28.5</td>
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Sample Profile, Table & Forecast

COMPANY PROFILES

Unicep Packaging Incorporated
1702 Industrial Drive
Sandpoint, ID 83864
208-265-9696
http://www.unicep.com

Annual Sales: $20 million (estimated)
Employment: 100 (estimated)

Key Products/Services: unit dose plastic vials and vertical form/fill/seal pouches; and contract packaging services

Unicep is a privately held company that specializes in the contract packaging of customer-supplied products. The Company’s contract packaging products serve the cosmetic, medical, dental, pharmaceutical, veterinary, household and industrial markets. Unicep conducts production, laboratory, warehouse, research and development activities at its 64,000-square-foot facility in Sandpoint, Idaho.

Unicep is involved in the US pharmaceutical packaging industry through the contract packaging of unit dose plastic vials, vertical form/fill/seal pouches and horizontal flow wrap. Packaging applications for these products include over-the-counter pharmaceuticals, and topical anesthetics and disinfectants in liquid, gel, lotion and cream formats. Unicep’s unit dose plastic vials include TWIST-TIP, MICRODOSE and ACCUDROP. These products are produced via the Company’s proprietary modified blow/fill/seal process. TWIST-TIP unit dose plastic vials are made from such materials as medium density polyethylene (MDPE) and polypropylene, and feature cylindrical plastic squeeze bulbs and integral twist-off tabs. MICRODOSE unit dose plastic vials, which are produced from low density polyethylene (LDPE) and MDPE, feature angled, tapered stems and snap-off, pull-off and twist-off tips.

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Sample Profile, Table & Forecast

“Comprising the largest market for prescription dispensing containers and closures, the retail pharmacy segment will remain a significant market served by the pharmaceutical packaging industry. Product demand derived from these establishments is forecast to expand 3.5 percent annually to $366 million in 2012. Growth will follow upward trends in prescription volume and evolving preferences for high value-added compliance containers.”

--Section VIII, pg. 217
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Pouches

This study analyzes the US pouch industry. It presents historical demand data for the years 1997, 2002 and 2007 and forecasts for 2012 and 2017 by pouch type (e.g., four-side and three-side seal flat, pillow, stand-up, resealable, aseptic, retort, shaped, spouted); and pouch application (food and beverage packaging, nonfood packaging). The study also considers market environment factors, details industry structure, evaluates market share and profiles leading competitors.

#2367 ................... 07/2008 .................... $4700

Caps & Closures

US demand for caps and closures will rise 4.9% annually through 2012. Gains will be bolstered by the popularity of value-added designs such as child-resistant and dispensing closures. Gains will be supported by the continuing growth of closure-intensive plastic packaging at the expense of closureless containers like metal cans. This study analyzes the $7.6 billion US cap and closure industry, with forecasts for 2012 and 2017 by material, product and market. It also evaluates market share and profiles industry competitors.

#2354 ................... 06/2008 .................... $4700

Cosmetic & Toiletry Containers

US cosmetic and toiletry container demand will reach 25.5 billion units in 2012 based on accelerating cosmetic and toiletry shipments. Plastic will be the fastest growing material while shaped aerosol cans and upscale paper cartons enjoy niche prospects. Skin care and liquid soap will be the fastest growing material while shaped aerosol cans provide the most attractive growth opportunities. This study analyzes the $3.6 billion US cosmetic and toiletry container industry, with forecasts for 2012 and 2017 by material and market. It also details market share and profiles major players.

#2322 ................... 04/2008 .................... $4600

Labels

US label shipments will grow 5.1% annually through 2011. Best opportunities are anticipated for the dominant pressure sensitive segment. However, stretch sleeve and heat shrink labels will grow the fastest. Paper will remain the largest stock material but will continue losing market share to plastic. This study analyzes the $14.3 billion US label industry, with forecasts for 2011 and 2016 by material, application method, printing technology and function. It also details market share and profiles leading producers.

#2268 ................... 12/2007 .................... $4500

Active & Intelligent Packaging

US demand for active and intelligent packaging will grow 13% yearly through 2011. Intelligent packaging will grow the fastest, driven by the emergence of lower cost time-temperature indicator (TTI) labels. Active packaging will be paced by gas scavengers. Pharmaceuticals, beverages and food will offer the best market prospects. This study analyzes the US active and intelligent packaging industry, with forecasts for 2011 and 2016 by product and market. It also details market share and profiles major players.

#2236 ................... 08/2007 .................... $4400