Pharmaceutical Packaging

US Industry Study with Forecasts for **2012 & 2017**

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Pharmaceutical Packaging

US Industry Study with Forecasts for ***2012 & 2017***

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Increased focus on such issues as barrier protection, infection control, patient drug compliance, drug dispensing errors and drug counterfeiting will favor high value-added packaging.

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.

US Pharmaceutical Packaging Demand, 2007

($12.2 billion)

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.

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Sample Text, Table & Chart

TABLE XX-00

PARENTERAL CONTAINER DEMAND BY PRODUCT GROUP

Item	1997	2002	2007	2012	2017
Primary Pharm Containers (mil units)	[illegible]	[illegible]	[illegible]	[illegible]	44700
% parenteral containers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Parenteral Containers (million units)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Vials	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Prefillable Syringes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
IV Containers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Ampuls	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
cents/unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Parenteral Containers (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Vials	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Prefillable Syringes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
IV Containers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Ampuls	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% parenteral containers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Primary Pharm Containers (mil $)	[illegible]	[illegible]	[illegible]	[illegible]	12260

SAMPLE TABLE

MATERIALS

Paper & Paperboard

The consumption of paper and paperboard in pharmaceu[illegible] aging products will reach $1[illegible] perce[illegible] from 2007. In general, grow[illegible] ls in [illegible] duction, which will expand [illegible] ppin[illegible] labels and package inserts. [illegible] erboa[illegible] a number of specialty pharm[illegible] tions[illegible] in unit dose systems such as [illegible] ion cu[illegible] barrier pouches.

SAMPLE TEXT

Leading paper and paperboard materials employed in ph[illegible] cal packaging applications include medical grade kraft, clay-[illegible] board, corrugated boxboard, solid bleached sulfate board and[illegible] newsback. The vast majority of usage is derived from price-[illegible] 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.

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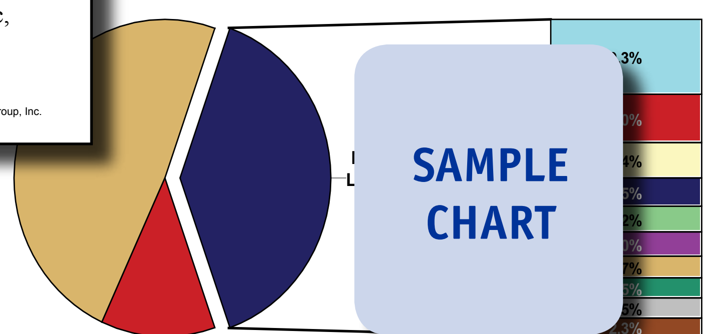
CHART IX-1

PHARMACEUTICAL PACKAGING MARKET SHARE BY COMPANY, 2007 ($12.2 billion)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE VII-1

PHARMACEUTICAL PACKAGING ACCESSORY DEMAND BY PRODUCT GROUP (million dollars)

Item	1997	2002	2007	2012	2017
Pharmaceutical Shipments (bil $)*					
$ pkg accessories/000$ shipments					
Pharm Packaging Accessory Demand					
Closures					
Secondary Containers					
Labels					
Package Inserts					
Other Accessories					
% accessories					
Pharmaceutical Packaging Demand					

SAMPLE TABLE

COMPANY PROFILES

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

Annual Sales:
Employment:

Key Products ... cal form/fill/
seal pouches;

SAMPLE PROFILE

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 snip-off, pull-off and twist-off tips.

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"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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Other Studies

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 markets. 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

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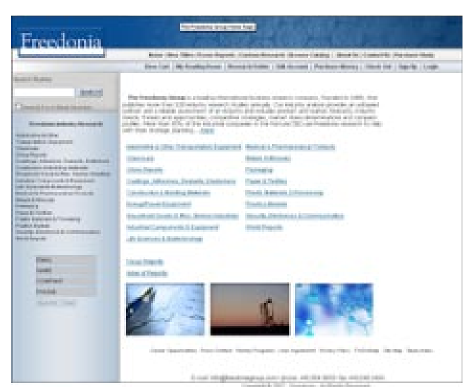

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