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World Pharmaceutical Packaging

Industry Study with Forecasts for **2013 & 2018**

Study #2504 | June 2009 | \$6100 | 507 pages

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China will be among the fastest growing markets based on rapidly expanding pharmaceutical manufacturing capabilities and a new government initiative to upgrade drug quality and integrity.

Global demand to grow 6.3% yearly through 2013

World pharmaceutical packaging demand is projected to increase 6.3 percent annually to \$62.3 billion in 2013. The developed countries of Western Europe, the US and Japan will continue to account for more than 60 percent of this amount. However, China will provide among the strongest growth opportunities based on rapidly expanding pharmaceutical manufacturing capabilities and the phasing-in of an extensive government program designed to upgrade the quality and integrity of nationally produced medicines. Among other major developing economies, India and Brazil will also evolve into fast-growing pharmaceutical packaging markets as drug-producing sectors are upgraded and diversified, especially in the area of generic ethical drugs.

US to remain largest consumer of drug packaging

The US will remain the largest consumer of pharmaceutical packaging as its advanced drug-producing sector introduces new sophisticated therapies with specialized packaging needs. Growth in West European demand will reflect upgraded government standards requiring unit dose, high barrier and anti-counterfeit packaging for many types of medication. Based on its broad range of proprietary and generic drug producers, Japan will remain a large, diverse consumer of pharmaceutical containers, closures and related accessories.

World Pharmaceutical Packaging Demand, 2008

(\$45.9 billion)



However, growth opportunities will weaken over the next several years as drug makers pursue greater packaging efficiencies to offset downward pressures on medication prices in both domestic and major export markets.

Prefillable inhalers, syringes among best prospects

World demand for primary pharmaceutical containers will increase 6.1 percent annually through 2013 to \$38.2 billion. Prefillable inhalers and prefillable syringes will generate the fastest growth opportunities among all pharmaceutical packaging products based on performance advantages in drug delivery and the introduction of new bioengineered

medicines. Plastic bottles will sustain the largest share of global demand based on low cost, versatility, availability, and ongoing quality and design improvements. Expanding applications in both solid and liquid oral medications will create moderate growth opportunities for these containers, especially in the US and developing countries. Pharmaceutical blister packaging will generate favorable growth in global demand based on adaptability to unit dose, clinical trial, compliance, institutional and over-the-counter drugs. Advances in the changeover features of processing machinery will also benefit growth by making blister packaging more cost-efficient in small-volume drug applications.

Sample Text, Table & Chart

WESTERN EUROPE

Germany: Pharmaceutical Packaging Opportunities

Demand for pharmaceutical packaging products in Germany is projected to increase by \$1.2 billion in 2008, reflecting strong growth in the value-added segment. This growth will moderate in 2009 and 2010, but is expected to provide a long-term gain. More favorable regulatory conditions will provide a boost for most drug containers and accessories based on size, diversity and access to the pharmaceutical industry.

SAMPLE TEXT

Because the container and closure segment is the largest consumer of pharmaceutical packaging, plastic bottles will continue to have the largest share of German pharmaceutical packaging demand in 2013 and beyond. However, faster growth opportunities will be found in higher value-added containers and accessories, including blister packaging, prefillable syringes and inhalers, parenteral vials, pouches, resistant closures, security-enhanced labels and high visibility containers. Blister packaging will fare well in the German pharmaceutical industry due to EU-mandated prescription pack requirements and increasing preferences for smaller-sized non-prescription drugs.

German demand for prefillable inhalers and prefillable syringes will expand at a fast pace based on their safety and performance advantages in the delivery of inhaled and parenteral medication. The market for prefillable syringes will also benefit from increasing investment in biotechnology drug development. Pouches will build up applications in the unit dose packaging of topical and oral powder medication. The rising need for improved anti-counterfeiting and other safety features, coupled with the widening use of aesthetically enhanced packaging systems, will create above average growth opportunities for pharmaceutical closures, secondary containers and specialty labels.

TABLE VI-6

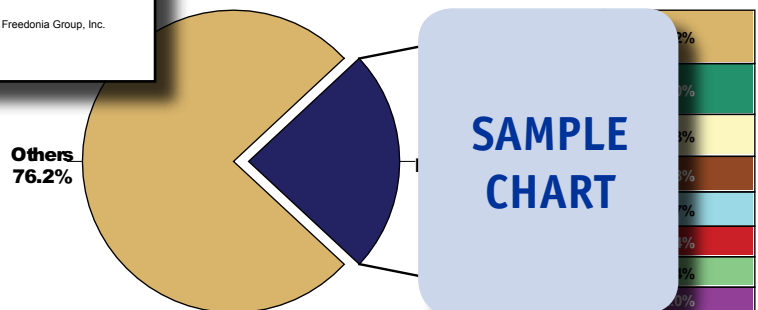
GERMANY - PHARMACEUTICAL PACKAGING DEMAND (million dollars)

Item	1998	2003	2008	2013	2018
Pharmaceutical Shipments (bil \$)	100.0	100.0	100.0	100.0	100.0
\$ packaging/000\$ pharmaceuticals	1.0	1.0	1.0	1.0	1.0
Pharmaceutical Packaging Demand	1.0	1.0	1.0	1.0	1.0
Primary Containers:					
Plastic Bottles	0.0	0.0	0.0	0.0	0.0
Blister Packaging	0.0	0.0	0.0	0.0	0.0
Prefillable Syringes	0.0	0.0	0.0	0.0	0.0
Parenteral Vials & Ampuls	0.0	0.0	0.0	0.0	0.0
Pouches	0.0	0.0	0.0	0.0	0.0
Prefillable Inhalers	0.0	0.0	0.0	0.0	0.0
Tubes	0.0	0.0	0.0	0.0	0.0
Glass Bottles & Jars	0.0	0.0	0.0	0.0	0.0
IV Containers	0.0	0.0	0.0	0.0	0.0
Other Primary Containers	0.0	0.0	0.0	0.0	0.0
Closures & Other:					
Closures	0.0	0.0	0.0	0.0	0.0
Labels	0.0	0.0	0.0	0.0	0.0
Secondary Containers	0.0	0.0	0.0	0.0	0.0
Prescription Containers	0.0	0.0	0.0	0.0	0.0
Packaging Accessories	0.0	0.0	0.0	0.0	0.0
% Germany	0.0	0.0	0.0	0.0	0.0
Western Europe Pharm Pkg Demand	0.0	0.0	0.0	0.0	0.0

SAMPLE TABLE

CHART IX-1

PHARMACEUTICAL PACKAGING MERCHANT MARKET SHARE BY COMPANY, 2008 (\$33.8 billion)

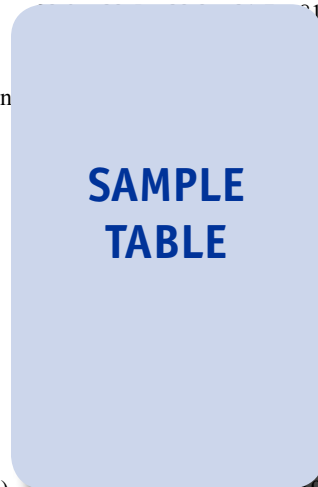


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-5
GERMANY - PHARMACEUTICAL PACKAGING INDICATORS

Item	1998	2003	2008	2013	2018
Population (million)					81.1
% 50 years & older					33
Population 50 Years & Older (million)					27
50 to 64 Years					22
65 Years & Older					5
per capita GDP					70
Gross Domestic Product (bil 2007\$)					35
\$ health expend/capita					64
Health Expenditures (billion \$)					10
\$ pharmaceuticals/capita					78
Pharmaceutical Demand (billion \$)					10
net exports					7
Pharmaceutical Shipments (billion \$)	17.8	24.3	34.0	43.3	59.7



COMPANY PROFILES

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

Annual Sales:
 Employment:

Key Products: ... and folding cartons and other ... ing services

Unicep is a leading provider of contract packaging of customer-supplied products. The Company's contract packaging business serves the cosmetic, medical, dental, pharmaceutical, veterinary, household and industrial markets.

Unicep participates in the world pharmaceutical packaging industry through its contract packaging activities, which include the production of unit-dose packaging, pouches, and folding cartons and other secondary packaging, and the provision of related contract packaging services. Unicep's unit-dose packaging includes MICRODOSE ampuls and TWIST-TIP vials with integral twist-off tabs. These products are made through the Company's modified blow-fill-seal process through which the packaging is formed, filled with pharmaceuticals and other products in liquid, gel and other formats, and sealed. Other unit-dose packaging from Unicep includes high-speed blow-fill-seal packaging for non-sterile filling of liquid products.

Pouches from Unicep include VERSAPAK products, which are available in form-fill-seal and thermoformed types. VERSAPAK pouches can be used to package a wide range of products, including

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"Aging demographic patterns, wide-spread coverage for prescription benefits and the sustained popularity of alternative medicines will boost pharmaceutical demand in Germany 4.7 percent annually to \$44 billion in 2013. The impact of reference pricing controls and reimbursement restrictions on advanced therapies will moderate faster gains by holding down the overall per capita value of medication consumed."

--Section VI, pg. 217

OTHER STUDIES

Active & Intelligent Packaging

This US active and intelligent packaging industry is analyzed in this study. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by product (e.g., gas scavengers, moisture control, antimicrobial, flavor and fragrance control, self-venting and air-releasing, susceptor, time-temperature indicator, pharmaceutical diagnostic, RFID-enabled) and market (e.g., food, beverages, drugs, electronics). The study also considers market environment factors, details market share and profiles industry players.

#2515 07/2009..... \$4700

World Labels

Global label demand will grow 4.3% yearly through 2013. The dominant pressure sensitive segment will continue to see above-average gains. The Asia/Pacific region will expand market share, driven by China and India. The US will remain strong among developed markets. This study analyzes the 39.5 billion square meter world label industry, with forecasts for 2013 and 2018 by application method, material, printing technology, market, world region and for 19 countries. It also evaluates market share and profiles industry players.

#2499 06/2009..... \$5800

World Caps & Closures

Global cap and closure demand is forecast to rise 4.2% yearly through 2012, supported by the continuing growth of closure-intensive plastic packaging over closureless containers. Emerging markets will lead gains, although the US will see strong value gains based on an ongoing shift toward value-added configurations. This study analyzes the \$29.7 billion world cap and closure industry, with forecasts for 2012 and 2017 by material, market, world region and for 18 countries. It also details market share and profiles industry players.

#2479 03/2009..... \$5800

High Visibility Packaging: Clamshells, Blisters & Other

US demand for high visibility packaging will grow 4% yearly through 2012. Clamshells will present the best opportunities based on ebullient gains in food markets such as fresh produce and prepared foods, and on their upscale appearance. Blister packs will also do well, driven by healthy gains in drug packaging and their lower material usage. This study analyzes the \$7 billion US high visibility packaging industry, with forecasts for 2012 and 2017 by material, product and market. It also evaluates market share and profiles major players.

#2436 12/2008..... \$4700

Sterile Medical Packaging

US demand for sterile medical packaging will rise 6.1% yearly through 2012. Prefillable syringes and inhalers and vials and ampuls will be the fastest growing segments based on their use in newly commercialized biotech drugs. Plastic resins will remain the fastest growing material in both volume and value demand. This study analyzes the \$4.8 billion US sterile medical packaging industry, with forecasts for 2012 and 2017 by product, material and application. It also evaluates company market share and profiles industry players.

#2405 09/2008..... \$4600

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

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