CLICK TO VIEW

Pharmaceutical Packaging

US Industry Study with Forecasts for **2014 & 2019**

Study #2645 | September 2010 | $4900 | 317 pages

The Freedonia Group
767 Beta Drive
Cleveland, OH • 44143-2326 • USA
Toll Free US Tel: 800.927.5900 or +1 440.684.9600
Fax: +1 440.646.0484
E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

PHARMACEUTICAL MARKET OVERVIEW

PHARMACEUTICAL PACKAGING OVERVIEW

PRIMARY CONTAINERS

PACKAGING ACCESSORIES

MARKETS

INDUSTRY STRUCTURE

COMPANY PROFILES

(continued on following page)

Pharmaceutical Packaging

US Industry Study with Forecasts for *2014 & 2019*

Table of Contents

COMPANY PROFILES
(continued from previous page)

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

PHARMACEUTICAL MARKET OVERVIEW

PHARMACEUTICAL PACKAGING OVERVIEW

PRIMARY CONTAINERS

PACKAGING ACCESSORIES

MARKETS

INDUSTRY STRUCTURE

Study #2645
September 2010
$4900
317 Pages

Pharmaceutical Packaging

US Industry Study with Forecasts for ***2014 & 2019***

Freedonia®

New regulations and standards that address such issues as barrier protection, infection control, patient drug compliance, drug dispensing errors, and drug counterfeiting will underlie growth.

US demand to increase 5.3% annually to 2014

Demand for pharmaceutical packaging in the US (including Puerto Rico) is forecast to increase 5.3 percent annually to $18.5 billion in 2014. Recently upgraded regulations and standards that address such issues as barrier protection, infection control, patient drug compliance, drug dispensing errors, and drug diversion and counterfeiting will underlie growth. An increased focus on these issues will boost demand for high value-added containers and accessories, including enhanced barrier plastic bottles, calendar and wallet blister packaging, prefillable syringes and inhalers, track and trace and authentication labels, and unit dose pouches.

US Pharmaceutical Packaging Demand by Product Group, 2009
($14.3 billion)

Prefillable syringes to pace primary containers

Demand for primary pharmaceutical containers will increase 5.2 percent annually to $11.3 billion in 2014. The fastest growth is anticipated for prefillable syringes, which will expand applications as advances in biotechnology lead to the introduction of new therapies that must be injected. 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. They will also continue to dominate applications in OTC medicines sold in tablet and capsule quantities of 50 or more. Pharmaceutical blister packaging will derive 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.

Closures to remain largest packaging accessory

Pharmaceutical closures will comprise a $3 billion US market in 2014, up 5.5 percent annually from 2009. Vial stoppers, syringe tips and plastic flip-top vial closures will command strong growth as injectable bioengineered drugs broaden emergency care and chronic disease indications. Push-and-turn child-resistant caps will remain the top closures for oral and liquid drug containers, but growth will slow 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.

Pharmaceutical Packaging

US Industry Study with Forecasts for ***2014 & 2019***

Freedonia

Sample Text, Table & Chart

TABLE V-2

PLASTIC PHARMACEUTICAL BOTTLES DEMAND BY PRODUCT GROUP (million dollars)

Item	1999	2004	2009	2014	2019
Oral Pharmaceutical Shipments (bil $)					.0
$ plastic bottles/000$ shipments					6
Plastic Pharmaceutical Bottles Demand					0
Ovals, Squares & Rounds					0
Dispensing Bottles					0
Jars					0
Cans					0
cents/unit					9
Plastic Pharmaceutical Bottles (mil units)					0
% plastic bottles					2
Primary Pharm Containers (mil units)	20				00

SAMPLE TABLE

PRIMARY CONTAINERS

Compartmented Packs -- Based on breadth of ap served, compartmented containers will continue to post th mand among pharmaceutical blister packaging in both uni Total demand for these containers is projected to increase annually to billion, in 2014 the packagi y supplements, sample, ins ail dispensed p drugs will a

Comp packs are avai major forma ed widely in the of over-the-counter and physicians' sample medication, co multiple-compartment thermoformed plastic film sealed to a backing composed of one or more materials. Each compartment is designed to hold a unit dose of medication. The primary blister pack component is usually enclosed in a secondary plastic or paperboard container, which is often overwrapped with plastic shrink film.

SAMPLE TEXT

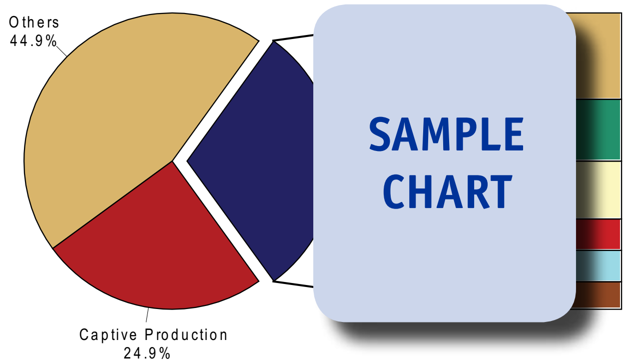
The second type of compartmented blister pack encloses medication in flexible strips of single bubble compartments attached end-to-end at perforated edges. The backing of each compartment is printed with the name and dosage formulation of the drug and contains a bar coding for that provides the lot number, expiration date and other security information. Except in the case of light sensitive medication, the top is usually made from clear plastic film, enabling health professionals to inspect the contents for quality prior to opening. Used primarily in the institutional medicines, flexible blister pack strips are usuall folding cartons containing 100 to 500 tablets or capsules.

Efforts to improve compartmented pharmaceutical blist have focused on upgrading security properties. For example SMART BLISTER PACKAGE produced by Amcor Flexible

100 Copyright 2010

CHART VIII-1

US PHARMACEUTICAL PACKAGING MARKET SHARE BY COMPANY ($14.3 billion, 2009)



Click here to purchase online

Order now, click here!

Pharmaceutical Packaging

US Industry Study with Forecasts for ***2014 & 2019***

Freedonia®

Sample Profile, Table & Forecast

TABLE VI-8

PRESCRIPTION CONTAINERS DEMAND BY TYPE
(million dollars)

Item	1999	2004	2009	2014	2019
Secondary Pharmaceutical Containers					[illegible]
% prescription containers					[illegible]
Prescription Containers Demand					[illegible]
Plastic Vials					[illegible]
Blister Packs					[illegible]
Glass Vials					[illegible]
Other					[illegible]
cents/unit					[illegible]
Prescription Containers Demand (mil un					[illegible]
Plastic Vials	[illegible]				[illegible]
Blister Packs					[illegible]
Glass Vials					[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	355

SAMPLE TABLE

COMPANY PROFILES

Oliver-Tolas Healthcare Packaging Incorporated
445 6th Street, Northwest
Grand Rapids, MI 49504
616-456-7711
http://www.ol

Annual Sales:
Employment:

Key Products foils, and anti-counterfeiting

SAMPLE PROFILE

Oliver-To the production of sterile-grade medical device packaging and pharmaceutical packaging. The Company is privately held.

Oliver-Tolas is active in the US pharmaceutical packaging industry through the manufacture of such products as pouches, lidding, high-barrier films and foils, and anti-counterfeiting and branding packaging. The Company was formed in December 2008, when Oliver Medical LLC (Grand Rapids, Michigan)--a sterile-grade packaging producer owned by private equity firm Mason Wells Incorporated (Milwaukee, Wisconsin)--acquired Tolas Healthcare Packaging Incorporated, also a manufacturer of sterile-grade packaging. Following the transaction, Oliver Medical merged its operations with those of Tolas Healthcare Packaging and changed its name to Oliver-Tolas Healthcare Packaging.

Oliver-Tolas produces pouches in OVANTEX, TYVEK (DuPont), foil, film and paper varieties. For example, the Company's patented OVANTEX material is a strong, breathable, synthetic fiber-based substrate with enhanced sterile barrier properties. Other representative pouch products include the Company's DISPOS-A-VENT range of film

291

"Demand for (blister packs) in secondary applications is projected to increase 3.8 percent annually to 590 million units, valued at $67 million, in 2014. Two principal trends will promote gains. First, to attract business from pharmaceutical benefit plans and consumers, an increasing number of retail and mail order pharmacies will offer blister packs as optional containers for prescription drugs. Second, ..."

--Section VI, pg. 183

ORDER INFORMATION

Five Convenient Ways to Order

INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Freedonia®

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or +1 440.684.9600

FAX: +1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional $2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM

f-WEB.-2645

Pharmaceutical Packaging $4900

☐ Corporate Use License (add to study price) * +$2600

___ Additional Print Copies @ $600 each *

Total (including selected option) $________

☐ Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

☐ Bill my company ☐ American Express ☐ MasterCard ☐ Visa

Credit Card # ________________ Expiration MM YY

Signature ________________

Name ________________

Title ________________

Company ________________

Division ________________

Street ________________ (No PO Box please)

City/State/Zip ________________

Country ________________

Phone ________________ Fax ________________

Email ________________

* Please check appropriate option and sign below to order an electronic version of the study.

☐ Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature ________________

☐ Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add $2600; one additional user, add $600; two additional users, add $1200; three additional users, add $1800.

Signature ________________

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com

Other Studies

Caps & Closures

US demand for caps and closures will rise 4% yearly through 2014. Advances will be aided by greater use of more costly dispensing and child-resistant closures, and by the ongoing popularity of single-serving containers. Plastic will remain the dominant material, while elastomer and rubber stoppers grow the fastest. This study analyzes the $7.8 billion US cap and closure industry, with forecasts for 2014 and 2019 by raw material, product and market. It also evaluates company market share and profiles industry players.

#2688 .... October 2010 .... $4900

Plastic Containers

US plastic container demand will rise 4.3% yearly to 2014, driven by performance advantages over alternative packaging media. Bottles and jars will remain the dominant type, while pails and other containers grow the fastest. PET and HDPE will remain the most common resins while polypropylene leads gains. This study analyzes the 12.5 billion pound US plastic container industry, with forecasts for 2014 and 2019 by type and resin. It also evaluates company market share and profiles industry players.

#2672 .... August 2010 .... $4900

Tube & Stick Packaging

US tube and stick packaging demand will rise 5.1% annually through 2014. The fastest gains are expected for stick packs, driven by advantages of product differentiation, portability and material savings compared to conventional single-portion pouches. The dominant squeeze tube segment will slightly lag the overall industry. This study analyzes the $1.4 billion tube and stick packaging industry, with forecasts for 2014 and 2019 by product type and market. It also evaluates company market share and profiles industry players.

#2631 .... May 2010 .... $4800

Converted Flexible Packaging

US converted flexible packaging demand will grow 3.4% yearly through 2013, supported by cost, performance and source-reduction advantages over most rigid packaging. Pouches will lead gains, including stand-up types as well as relatively newer products such as flat-bottomed, side-gusseted and stick types. This study analyzes the $15.2 billion US converted flexible packaging industry, with forecasts for 2013 and 2018 by material, product and market. It also evaluates market share and profiles industry players.

#2558 .... October 2009 .... $4900

Labels

US label shipments are projected to advance 4.5% annually through 2013. The pressure sensitive segment will claim most gains, while more rapid growth will be achieved by heat-shrink and stretch-sleeve, and in-mold labels. Paper will remain the most widely used stock material, but will be outpaced by plastic. This study analyzes the $15.4 billion US label industry, with forecasts for 2013 and 2018 by material, application method, printing technology and function. It also evaluates market share and profiles industry players.

#2536 .... August 2009 .... $4800

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

Click here to learn more about Freedonia

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

Click here to learn more about Custom Research

Click here for complete title list

Click here to visit freedoniagroup.com

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com