INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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World Pharmaceutical Packaging

Industry Study with Forecasts for **2015 & 2020**

Study #2765 | June 2011 | $6400 | 528 pages

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INDUSTRY STRUCTURE

Reflecting the operation of extensive and diverse drug-producing industries, Western Europe, the US and Japan will account for over 70 percent of demand in 2015.

World demand to rise 5.5% annually through 2015

World demand for pharmaceutical packaging products is forecast to expand 5.5 percent annually to $62 billion in 2015. Reflecting the operation of extensive and diverse drug-producing industries, the developed countries of Western Europe, the US and Japan will account for over 70 percent of this amount. However, China will provide faster 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.

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 packaging, but will provide below-average growth opportunities as drug makers pursue greater packaging efficiencies to offset pricing pressures.

World Pharmaceutical Packaging Demand by Region, 2010
($47.2 billion)

Prefillable syringes/vials to pace primary containers

Among primary pharmaceutical containers, 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. 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 over-the-counter medicines sold in tablet and capsule quantities of 50 or more. Blister packaging will comprise the second-largest selling group of primary pharmaceutical containers based on its adaptability to unit dose and clinical trial formats with expanded label content, high visibility, and built-in track and trace.

The global market for pharmaceutical pouches will expand at a below- average pace as applications remain limited to the unit dose packaging of transdermal, powder and topical medicines. Prefillable inhalers will realize stronger growth opportunities as the worldwide 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.

Sample Text, Table & Chart

TABLE V-11

SPAIN: PHARMACEUTICAL PACKAGING INDICATORS

Item	2000	2005	2010	2015	2020
Total Population (million)					.7
% 65 years & older					.7
Population 65 Years & Older (million)					.3
$ GDP/capita	2				0
Gross Domestic Product (bil 2009$)					.5
$ health expenditures/capita					2
Health Expenditures (bil $)					.0
$ pharmaceuticals/000$ health exper					9
Pharmaceutical Demand (mil $)	1				00
net exports	-				00
Pharmaceutical Shipments (mil $)					00

SAMPLE TABLE

WESTERN EUROPE

Spain: Pharmaceutical Packaging Demand

Demand for pharmaceutical packaging products in Spai $ percent annually from 2010. The c unter and alternative medicines, c th iption drugs by the aging populat p wth in the level of external pharr ir ne new reference pricing system w fa l packaging demand.

SAMPLE TEXT

Plastic bottles will account for the largest share of dema pharmaceutical packaging products consumed in Spain based of applications in ethical, over-the-counter and alternative me and nutritional preparations. Blister packaging will continue to real-ize the second-largest share of primary container demand, spurred by expanding uses as prescription packs and over-the-counter medication containers. Among all pharmaceutical packaging sold in Spain, contain-ers, closures and accessories that promote safer and more effective drug administration and compliance will post the strongest growth opportuni-ties. Included in this group will be prefillable inhalers and syringes, high barrier glass and plastic vials, dispensing closures, and expanded content and security labels.

Prior to the tightening of prescription drug price controls, Spain had been attracting a high level of investment in its pharmaceutical industry. Since the early 2000s, Boehringer Ingelheim, Eli Lilly, Merck KGaA, Merck & Company, Novartis, Organon and Sanofi-Aventis a or completed major projects involving the expansion and mo of Spanish production sites. In addition, leading national dru Almirall opened a new research and development center nea in 2004 to focus on commercializing biotechnology-based dı

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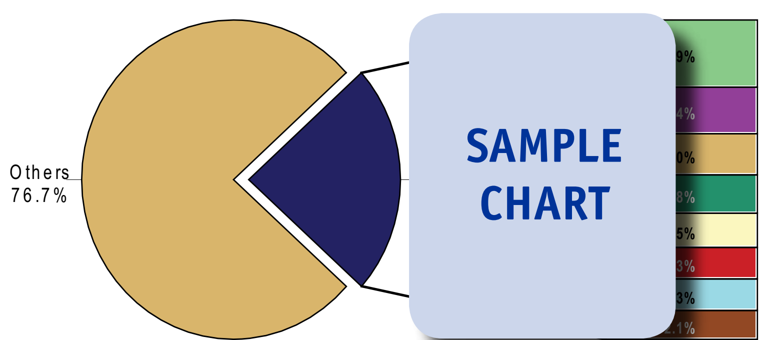
CHART VIII-1

WORLD PHARMACEUTICAL PACKAGING, MERCHANT MARKET SHARE BY COMPANY ($35.4 billion, 2010)



World Pharmaceutical Packaging

Industry Study with Forecasts for ***2015 & 2020***

Freedonia®

Sample Profile, Table & Forecast

TABLE V-12

**SPAIN: PHARMACEUTICAL PACKAGING DEMAND
(million dollars)**

Item	2000	2005	2010	2015	2020
Pharmaceutical Shipments					
$ packaging/000$ shipments					
Pharmaceutical Packaging Demand					
Primary Containers:					
Plastic Bottles					
Blister Packaging					
Prefillable Syringes					
Parenteral Vials & Ampuls					
Prefillable Inhalers					
Pouches					
Medication Tubes					
Glass Bottles					
IV Containers					
Other Primary Containers					
Closures					
Labels					
Secondary Containers					
Prescription Containers					
Packaging Accessories					
% Spain					
Western Europe Pharm Pkg Demand					

SAMPLE TABLE

COMPANY PROFILES

Global Closure Systems
220 Bureaux de la Colline
92213 Saint Cloud Cedex
France
331-7876-
http://w

Annual ... d by c
Employ

Key Pro

SAMPLE PROFILE

Gl... anufactures plastic and meta... ceutical, household and industrial markets. Annually, the Company produces in excess of 30 billion closures. GCS is owned by Europe-based private equity firm PAI Partners Incorporated.

GCS competes in the world pharmaceutical packaging industry through the Astra Plastique SAS and the United Closures and Plastics Limited (UCP) subsidiaries. These companies manufacture a range of closures that can be used in pharmaceutical packaging applications.

Astra Plastique (France) manufactures child-resistant and tamper-evident closures for the pharmaceutical, industrial and food industries. Specifically, GCS makes VISTOP tamper-evident closures, which include seals, stoppers, drop dispensers, pourers and child-resistant types. These closures are available in a wide range of sizes and with various features. Astra Plastique also makes CAPEPHARMA lightweight screw-on closures for use with plastic or glass containers. Production operations for the company are conducted at a plant in Saint-Georges de Reneins, France.

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"In spite of stringent prescription drug price controls, pharmaceutical demand in Spain will expand at a relatively strong pace, increasing 6.1 percent annually to $32.7 billion in 2015. Growth will partially reflect continuing imbalances in primary medical resources, which will keep many residents dependent on medication to meet basic health care needs. Periodic price cuts on ethical drugs will inhibit faster gains."

--Section V, pg. 253

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Other Studies

Labels

This study analyzes the US label industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by raw and stock material, application method (e.g., pressure sensitive, glue-applied, stretch sleeve and heat shrink, thermal transfer, in-mold), printing technology and function (e.g., primary, secondary, industrial, decorative, mailing and shipping). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2784 .... July 2011 .... $5100

Active & Intelligent Packaging

US demand for active and intelligent packaging will climb eight percent annually through 2015. Intelligent packaging will be the fastest growing segment, propelled by Quick Response (QR) and other two-dimensional (2D) barcodes. The dominant active packaging segment will be driven by above-average advances for gas scavengers and susceptor packaging. This study analyzes the $1.5 billion US active and intelligent packaging industry, with forecasts for 2015 and 2020 by product and market. The study also evaluates company market share and profiles industry players.

#2772 ....June 2011 .... $4900

World Caps & Closures

World demand for caps and closures will rise 4.6 percent annually through 2014. Growth will be based in part by a shift toward higher-value closures such as child-resistant, tamper-evident and dispensing types. Some of the best opportunities will be found in the Asia/Pacific region, where over two-fifths of market gains will occur. This study analyzes the $32 billion world cap and closure industry, with forecasts for 2014 and 2019 by material, market, world region and for 18 countries. It also evaluates company market share and profiles industry participants.

#2719 ....January 2011 .... $6100

Caps & Closures

US demand for caps and closures will rise 4 percent 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

Pharmaceutical Packaging

Demand for pharmaceutical packaging in the US is forecast to increase 5.3 percent annually through 2014. Gains will be driven by recently upgraded regulations and standards that will boost demand for high value-added containers and accessories. Parenteral containers and labels will be among the fastest growing types. This study analyzes the $14.3 billion US pharmaceutical packaging industry, with forecasts for 2014 and 2019 by type and market. It also evaluates company market share and profiles industry players.

#2645 .... September 2010................ $4900

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