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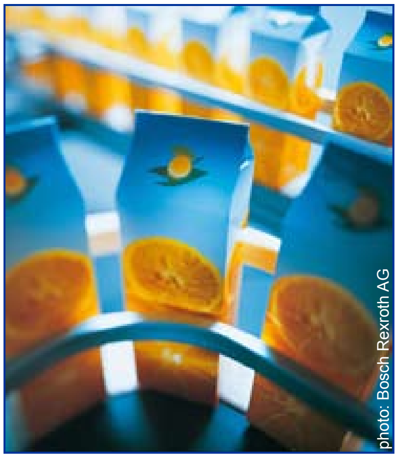

Aseptic Packaging

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

Study #2827 | December 2011 | $4900 | 207 pages

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Aseptic Packaging

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

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Aseptic Packaging

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

Growth in US aseptic packaging demand will be driven by drug sterility requirements and ambient distribution and storage advantages for food and beverages.

US demand to rise 8% annually through 2015

Demand for aseptic packaging is projected to expand 8.0 percent per year to $5.1 billion in 2015, outpacing overall packaging demand. In unit terms, demand is expected to expand 4.1 percent annually to 52.4 billion. Growth will be driven by drug sterility requirements and distribution and storage advantages for food and beverages.

Dominant pharmaceutical market to lead gains

Through 2015, demand for aseptic packaging in the dominant pharmaceutical market is forecast to advance 8.4 percent annually to $3.4 billion. Growth will reflect the broadening availability and consumption of biotechnology-based drugs, and aseptic filling requirements with other liquid pharmaceuticals. Additionally, opportunities will be driven by preferences among health care providers for unit-dose delivery formats, such as vials, ampuls, prefillable syringes and premixed IV solutions, for increased dosing accuracy. Growth for aseptic packaging in the beverage market will be supported by consumption trends in beverages that tend to be packaged aseptically, along with cost and environmental benefits, especially in terms of ambient shipping and storage. Gains in the food market will be driven by shelf-stability advantages, as well as by expanding applications in liquid, low-particulate and pumpable foods, often supplanting metal cans and glass jars.

Prefillable syringes to be fastest growing product

The ongoing commercialization of biotechnology-based drugs will fuel above-average demand growth for aseptic vials and ampuls, and prefillable syringes, which are prevalent delivery systems for these drugs. Prefillable syringes will represent the fastest growing aseptic packaging product type through 2015, with demand projected to expand 11.0 percent yearly to $1.1 billion. Moreover, opportunities for aseptic prefillable syringes will benefit from safety and convenience advantages and the prevalence of chronic conditions necessitating lifetime drug regimens.

Though aseptic carton prospects will be moderated by slow unit demand growth in fruit beverage applications, robust increases are expected in other uses based on favorable consumption trends in ready-to-drink wellness-type beverages, improving aesthetics and the perception that products packaged in these containers are of higher quality than those in other container types. Safety concerns regarding bisphenol-A (BPA), a chemical used as an inner coating in metal cans, will fuel increased interest in BPA-free alternatives such as aseptic cartons. Continued opportunities are anticipated for aseptic bags and pouches, especially for bag-in-box and other large bags sold to the foodservice and food processing industries.

Sample Text, Table & Chart

TABLE III-1

ASEPTIC PACKAGING DEMAND BY TYPE
(million dollars)

SAMPLE TABLE

Item	2000	2005	2010	2015	2020
Total Packaging Demand (bil $)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% aseptic	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Aseptic Packaging Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Plastic Bottles	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Vials & Ampuls	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Prefillable Syringes	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Bags & Pouches	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cartons	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Cups	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Glass Bottles	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
cents/unit	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Aseptic Packaging Demand (bil units)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

PRODUCTS

Plastic Bottles

SAMPLE TEXT

Demand for plastic bottles for aseptic packaging is proj... increase ... 2 billion in 2015, represe... billion u... above-average advanc... and beve... expanding applications a... ity incre... ained by high capital inv... costs an... bandon their investment... efficient ... ns such as those for hot-... ethylene ... The pharmaceutical ma... continue to account for the largest portion of demand based o... requirements for aseptic filling for ophthalmic solutions.

Plastic bottle demand in aseptic pharmaceutical applications is expected to climb 7.8 percent per year to $735 million in 2015, slightly below-average based on the more well-established use of plastic bottles for aseptic filling than in the food and beverage markets. In addition, bottles will face increased competition from unit-dose packaging, especially aseptic blow-fill-seal vials, which are preservative-free and offer a high level of sterility and single-use convenience. Still, continued opportunities are anticipated due to ongoing requirements for dispensing bottles with ophthalmic preparations, both ethical and over-the-counter products. Aseptic filling is necessary for the sterilization of ophthalmic solutions, which are heat-sensitive.

High density polyethylene (HDPE) and low density pol... are the most common resins employed in the production of p... pharmaceutical dispensing bottles. In addition, ongoing effo... manufacturers to upgrade packaging aesthetics and barrier p... expanding the presence of bottles made from other resins, in... polyethylene terephthalate glycol (PETG) and polypropylen... Bausch & Lomb converted the packaging of its RENU FRES... lens solution from standard white HDPE bottles to transpare...

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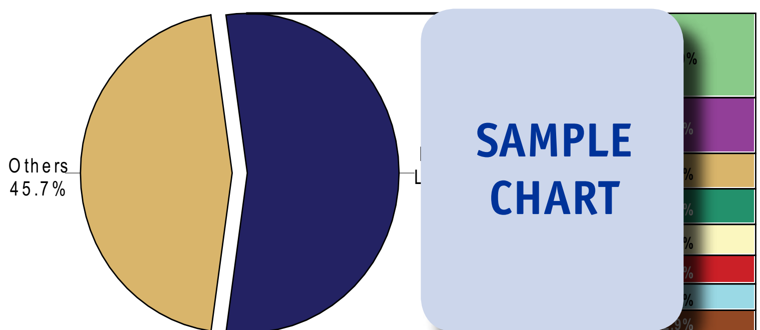
CHART V-1

US ASEPTIC PACKAGING MARKET SHARE, 2010
($3.5 billion)



Aseptic Packaging

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

Sample Profile, Table & Forecast

TABLE IV-6

FRUIT BEVERAGES ASEPTIC PACKAGING DEMAND (million dollars)

Item	2000	2005	2010	2015	2020
Fruit Beverage Shipments (mil gal)	3				0
$ pkg/000 gallons fruit beverages					4
Fruit Beverage Aseptic Packaging Dema					5
Cartons					0
Plastic Bottles					7
Bags & Pouches					9
Cups					9
% fruit beverages					0
Beverage Aseptic Packaging Demand					0

SAMPLE TABLE

COMPANY PROFILES

Weiler Engineering Incorporated
1395 Gateway Drive
Elgin, IL 60123
847-697-4900
http://www.w

Annual Sales:
Employment:

Key Products: packaging

SAMPLE PROFILE

Weiler E packaging for sterile liquid pro applications. The privately held company conducts development and manufacturing activities at its headquarters in Elgin, Illinois. Weiler Engineering's products are marketed and distributed worldwide via independent distributors.

The Company's main product line is the ASEP-TECH range of blow-fill-seal (BFS) machines for aseptic liquid packaging end uses. ASEP-TECH BFS technology integrates blow molding, sterile filling and hermetic sealing in one continuous operation to produce reliable and cost-effective aseptically manufactured products. ASEP-TECH BFS machines include a blow-fill nozzle that is lowered into the parison to form a seal with the neck of the mold. The container is formed by blowing sterile filtered compressed air into the parison, expanding the air against the walls of the mold cavity. The sterile air is then expelled from the container and the sterile product is metered into the container via the fill nozzle. Separate sealing molds are used to form the top and hermetically seal the container. End uses for ASEP-TECH BFS include small- and large-volume parenterals, ophthalmic solutions and respiratory therapy products.

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"Demand for aseptic packaging in fruit beverage applications is expected to increase 4.1 percent per year to $465 million in 2015, trailing the beverage market average due to the maturity of fruit beverages, along with competition from hot-fill processing. Aseptic cartons are the leading aseptic packaging type for fruit beverages, accounting for 55 percent of value demand in 2010."

--Section IV, pg. 88

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Other Studies

Beverage Containers in China

Demand for beverage containers in China will rise 9.6 percent per year through 2015. Plastic beverage containers will remain the largest material segment, while paperboard containers grow the fastest, led by aseptic cartons. Milk containers will be the largest nonalcoholic beverage market, while beer remains the largest alcoholic beverage market. This study analyzes the 297 billion unit beverage container industry in China, with forecasts for 2015 and 2020 by market and material. The study also evaluates company market share and profiles industry participants.

#2815 .... November 2011 .... $5400

Converted Flexible Packaging

Demand for converted flexible packaging in the US will rise 3.8 percent annually through 2015. Pouches will lead gains based on continued conversions to stand-up pouches and healthy gains for flat pouches, along with lighter weight and reduced material use. Bags will remain the largest segment. Food markets will outpace nonfood uses. This study analyzes the $15.1 billion US converted flexible packaging industry, with forecasts for 2015 and 2020 by material, product and market. The study also evaluates company market share and profiles industry players.

#2807 .... October 2011 .... $5100

World Pharmaceutical Packaging

World demand for pharmaceutical packaging is forecast to rise 5.5 percent annually through 2015. The developed countries of Western Europe, the US and Japan will account for over 70 percent of the amount, although China will provide faster growth opportunities. India and Brazil will also evolve into fast-growing markets. This study analyzes the $47.2 billion world drug packaging industry, with forecasts for 2015 and 2020 by raw material and resin, product, world region and for 14 countries. The study also evaluates company market share and profiles industry players.

#2765 .... June 2011 .... $6400

World Cups & Lids

World demand for cups and lids will rise five percent per year through 2014, fueled in part by advances in the quick service restaurant industry. Products made from biodegradable, recyclable or recycled materials will post robust advances. The US will remain by far the largest market, while developing regions grow the fastest. This study analyzes the $18.3 billion world cup and lid industry, with forecasts for 2014 and 2019 by product, market, world region and for 18 countries. It also evaluates company market share and profiles industry players.

#2741 .... March 2011.................. $5800

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

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