INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

World Pharmaceutical Packaging

Industry Study with Forecasts for **2017 & 2022**

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World Pharmaceutical Packaging

Industry Study with Forecasts for ***2017 & 2022***

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MARKET ENVIRONMENT

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INDUSTRY STRUCTURE

World Pharmaceutical Packaging

Industry Study with Forecasts for ***2017 & 2022***

Because of advanced and diverse drug producing industries, almost 65 percent of global demand will exist in the developed economies of Canada, Japan, the US, and Western Europe.

World demand to rise 6.4% annually through 2017

World demand for pharmaceutical packaging products will increase 6.4 percent annually to $90 billion in 2017. Because of advanced and diverse drug producing industries, almost 65 percent of global demand will exist in the developed economies of Canada, Japan, the US, and Western Europe. India and China will form the fastest growing markets due to rapidly expanding pharmaceutical manufacturing capabilities and the adoption of more stringent regulations aimed at improving the quality and integrity of domestically produced medicines. Turkey, Mexico, and Brazil are among other developing countries that are expected to expand and diversify drug producing industries and register above average gains in pharmaceutical packaging product demand.

US to remain largest national market

Over the long term, the US will continue to form the largest national pharmaceutical packaging product market as its advanced drug producing sector commercializes new sophisticated therapies with specialized packaging needs. Demand in Western Europe will remain comparatively high and expand steadily due to the impact of new product introductions and upgraded government standards covering unit dose, high barrier, and anti-counterfeit packaging of many types of medicines. Based on broad contingents of proprietary and generic drug producers, Canada and Japan will continue to be large, diverse consumers of pharmaceutical packaging products. However, both countries will see below average growth in demand as drug makers pursue greater packaging efficiencies to offset medication pricing pressures.

World Pharmaceutical Packaging Demand ($90 billion, 2017)

Prefillable syringes, parenteral vials to lead gains among primary containers

Global demand for primary pharmaceutical containers will expand 6.6 percent annually to more than $57 billion in 2017. Prefillable syringes and parenteral vials will lead growth as new injectable therapies developed through biotechnology and related methods are introduced into the marketplace. Based on uses in the bulk and prescription dose packaging of oral ethical drugs and the large quantity packaging of solid dose oral over-the-counter medicines, plastic bottles will continue to record the largest demand globally among primary pharmaceutical containers, or $20.6 billion in 2017. Blister packaging will comprise the second largest selling group of these containers based on its adaptability to unit dose and clinical trial dosage formats with expanded label content, high visibility, and built-in track and trace features.

Sample Text, Table & Chart

TABLE V-12

SPAIN: PHARMACEUTICAL PACKAGING DEMAND BY TYPE (million dollars)

Item	2002	2007	2012	2017	2022
Pharmaceutical Shipments (bil $)					
$ packaging/000$ pharmaceuticals					
Pharmaceutical Packaging Demand					
Primary Containers:					
Plastic Bottles					
Blister Packaging					
Prefillable Syringes					
Parenteral Ampuls & Vials					
Prefillable Inhalers					
Pouches					
Medication Tubes					
IV Containers					
Glass Bottles & Jars					
Other Primary Containers					
Closures					
Labels					
Secondary Containers					
Prescription Containers					
Packaging Accessories					
% Spain					
Western Europe Pharm Pkg Demand					

SAMPLE TABLE

WESTERN EUROPE

Spain: Pharmaceutical Packaging Demand

Demand for pharmaceutical packaging products in Spai... almost $... percent annually from 20... increasi... -counter and alternative m... coupled ... prescription drugs by the ... populati... nited growth in the level ... pharmac... ble to the new reference ... system ... harmaceutical packaging ...

SAMPLE TEXT

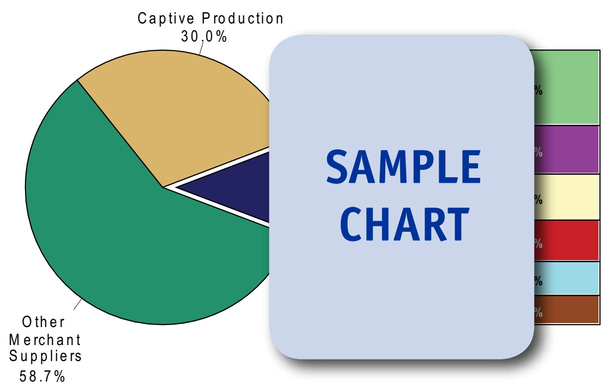
Plastic bottles will account for the largest share of dema... pharmaceutical packaging products consumed in Spain base... of applications in ethical, over-the-counter, and alternative m... and nutritional preparations. Blister packaging will continue... the second largest share of primary container demand, spurre... panding uses as prescription packs and over-the-counter med... tainers. Among all pharmaceutical packaging sold in Spain, ... closures, labels, and accessories that promote safer and more... drug administration and improved patient medication schedu... ence will post the strongest growth opportunities. Included i... will be prefillable inhalers and syringes, high barrier glass an... 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 pharmaceuti... try. Since the early 2000s, Boehringer Ingelheim, Eli Lilly, ... Company, Merck KGaA, Novartis, and Sanofi all initiated o... major projects involving the expansion and modernization o... ish production sites. In addition, leading national drug make... opened a new research and development center near Barcelo... to focus on commercializing biotechnology-based drugs.

246 Copyright 2013 ...

CHART VIII-1

WORLD PHARMACEUTICAL PACKAGING INDUSTRY MARKET SHARE BY SEGMENT ($66 billion)



World Pharmaceutical Packaging

Industry Study with Forecasts for ***2017 & 2022***

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Sample Profile, Table & Forecast

TABLE V-11

**SPAIN:
PHARMACEUTICAL PACKAGING INDICATORS**

Item	2002	2007	2012	2017	2022
Total Population (million)					
% 65 years & older					
Population 65 Years & Older (million)					
$ GDP/capita					
Gross Domestic Product (bil 2011$)					
$ health expenditures/capita					
Health Expenditures (bil $)					
$ pharm/000$ health expenditures					
Pharmaceutical Demand (bil $)					
net exports					
Pharmaceutical Shipments (bil $)					

SAMPLE TABLE

COMPANY PROFILES

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

Annual Sales
Employment

Key Products ... ct pharmaceutical packaging

SAMPLE PROFILE

Unicep is a privately held company that specializes in the contract packaging of customer-supplied products. The Company's contract packaging business serves the cosmetic, medical, dental, pharmaceutical, veterinary, household, and industrial markets.

Unicep is active in the world pharmaceutical packaging market via the provision of primary and secondary contract packaging services and related materials for over-the-counter (OTC) drugs and other pharmaceutical products in such formats as liquids, gels, lotions, and creams. The Company's primary contract pharmaceutical packaging utilizes unit dose vials and pouches. Unit dose packaging is made via blow-fill-seal processes for packaging pharmaceuticals for oral health care and other applications. Examples of unit dose packaging products are TWIST-TIP vials composed of medium density polyethylene (MDPE), high density polyethylene, and polypropylene; MICRODOSE vials produced from low density polyethylene and MDPE; and DUALDOSE modified packages, which are suitable for OTC drugs and other products, and are designed to keep two different substances separate until the point of use. The Company produces form-fill-seal pouches from heat-sealable papers, films, coextruded materials, and laminates for

 513

"... billion in 2017, above the West European average. Hospital care, physicians' services, and medication will continue to absorb 80 percent of spending as regional health authorities focus on extending the accessibility and availability of basic health care. Expenditures for nursing home care, home health care, dental procedures, and specialty outpatient services will remain below average by West European standards, with most activities in these areas financed by private sources."
--Section V, pg. 283

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Other Studies

Labels

This study analyzes the US label industry. It presents historical demand data (2002, 2007, 2012) and forecasts for 2017 and 2022 by raw and stock material (e.g., paper, plastic, adhesives, inks), application method (e.g., pressure sensitive, glue-applied, stretch sleeve and heat-shrink, heat transfer, in-mold), printing technology (e.g., flexography, lithography, screen), and function. The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry players.

#3057 .... July 2013.................... $5300

World Medical Device Packaging

This study analyzes the world market for medical device packaging. It presents historical (2002, 2007, 2012) demand data and forecasts for 2017 and 2022 by type (e.g., trays, pouches, bags, blister and clamshell packs, boxes, specialty vials, labels, lidding, protective packaging), application (surgical appliances and supplies, surgical and medical instruments, electromedical equipment, diagnostic products), world region, and major country. The study also considers market environment factors, evaluates company market share, and profiles industry players.

#3056 .... July 2013.................... $6100

World Caps & Closures

World demand for caps and closures is projected to rise 5.3 percent per year to $46 billion in 2016, led by developing regions. Beverages will remain the dominant market, while opportunities in the food market will benefit from dispensing and other value-added closures such as non-drip flip top pourer caps. This study analyzes the $35.8 billion world cap and closure industry, with forecasts for 2016 and 2021 by material, market, world region and for 18 countries. The study also evaluates company market share and profiles industry participants.

#2986 .... February 2013................. $6300

Caps & Closures

US demand for caps and closures will rise 4.4 percent annually to $10.4 billion in 2016. The dominant plastic cap and closure segment will post above average increases. Beverages will remain the largest market, while pharmaceuticals will be the fastest growing. Among other closure types, elastomer and rubber stopper demand will register healthy gains. This study analyzes the $8.4 billion US cap and closure industry, with forecasts for 2016 and 2021 by raw material, product and market. The study also evaluates company market share and profiles industry players.

#2975 ....December 2012 .... $5200

Pouches

Demand for pouches in the US is projected to increase 5.1 percent per year to $8.8 billion in 2016. Gains will be driven by faster growth for stand-up pouches stemming from sustainability, functional, and marketing advantages over alternative packaging media. The nonfood market will slightly outpace the dominant food market. This study analyzes the $6.9 billion US market for pouches, with forecasts for 2016 and 2021 by type, market, feature and production method. The study also evaluates company market share and profiles industry players.

#2899 .... July 2012.................... $4900

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