

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 5](#)

[Sample Text, Table
& Chart 6](#)

[Sample Profile, Table &
Forecast 7](#)

[Order Form & Corporate
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World Pharmaceutical Packaging

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

Study #3025 | May 2013 | \$6500 | 529 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Economic Factors	5
Recent Economic Trends	6
World Economic Outlook	8
World Demographic Trends	11
Total Population	11
Population 65 Years & Older	13
World Health Expenditures	15
World Pharmaceutical Market Overview	18
Product Demand Patterns	19
Product Shipments	21
Regulation	25

OVERVIEW

General	29
Pharmaceutical Packaging Demand by Region	30
Pharmaceutical Packaging Demand by Product Group	33
Primary Pharmaceutical Containers	38
Demand by Region	39
Demand by Type	40
Plastic Pharmaceutical Bottles	42
Demand by Region	42
Demand by Type	44
Ovals, Squares, & Rounds	46
Dispensing Bottles	47
Plastic Jars	48
Plastic Cans	49
Producers	49
Pharmaceutical Blister Packaging	50
Demand by Region	50
Demand by Type	52
Compartment Blister Packs	54
Slide Blister Packs	54
Other Blister Packs	55
Demand by Component	55
Films	55
Lidding Materials	58
Secondary Containers	59
Packaging Accessories	59
Producers	61
Prefillable Syringes	62
Demand by Region	62
Demand by Type	64
Injectors	65
Cartridges	68
Parenteral Vials & Ampuls	70
Demand by Region	71
Demand by Type	72
Glass Vials	73
Plastic Vials	75
Ampuls	76

Prefillable Inhalers	77
Demand by Region	78
Demand by Type	79
Metered Dose Inhalers (MDIs)	80
Dry Powder Inhalers (DPIs)	84
Pharmaceutical Pouches	86
Demand by Region	86
Demand by Type	88
Producers	89
Medication Tubes	90
Demand by Region	90
Demand by Type	92
Composite Tubes	92
All-Plastic Tubes	94
Collapsible Metal Tubes	95
IV Containers	95
Demand by Region	96
Demand by Type	97
Semi-Rigid Plastic Containers	98
Mini-Bags	100
Glass IV Containers	102
Glass Pharmaceutical Bottles & Jars	102
Demand by Region	103
Demand by Type	104
Producers	105
Other Primary Pharmaceutical Containers	105
Demand by Region	106
Demand by Type	107
Strip Packs	108
Paperboard Boxes	109
All Other Primary Containers	109
Pharmaceutical Closures	111
Demand by Region	112
Demand by Type	113
Plastic Closures	115
Child Resistant Closures	116
Standard Plastic Closures	118
Specialty Plastic Closures	120
Other Closures	122
Elastomer & Rubber Stoppers	123
Metal Closures	125
Foil, Paper, & Laminated Closures	126
Pharmaceutical Labels	127
Demand by Region	127
Demand by Type	128
Security Labels	129
Track & Trace Labels	130
Authentication Labels	131
Standard Labels	132
Specialty Labels	132
Producers	134
Secondary Pharmaceutical Containers	134
Demand by Region	134
Demand by Type	135
Outer Paperboard Boxes	136
Folding Cartons	139
Corrugated Shipping Containers	139
Other Secondary Containers	140

Prescription Containers	141
Demand by Region	141
Demand by Type	143
Plastic Vials	144
Blister Packs	146
Other Prescription Containers	147
Producers	147
Pharmaceutical Packaging Accessories	148
Demand by Region	148
Demand by Type	149
Package Inserts	150
Shrink Materials	151
Security Components	151
Inner & Outer Seals	152
Desiccants	153
Other Accessories	153
World Production & Trade	154
Pharmaceutical Packaging Raw Materials	156
Plastic Resins	157
High Density Polyethylene (HDPE)	158
Polyethylene Terephthalate (PET)	159
Polypropylene	159
Low Density Polyethylene (LDPE)	160
Polyvinyl Chloride (PVC)	160
Polystyrene	161
Other Plastic Resins	161
Paper & Paperboard	162
Glass	163
Aluminum Foil	164
Other Raw Materials	165

NORTH AMERICA

Market Environment	167
Pharmaceutical Packaging Demand	169
United States	172
Canada	182
Mexico	190

WESTERN EUROPE

Market Environment	197
Pharmaceutical Packaging Demand	201
France	204
Germany	214
Ireland	225
Italy	232
Spain	241
Switzerland	249
United Kingdom	258
Other Western Europe	269

ASIA/PACIFIC

Market Environment	283
Pharmaceutical Packaging Demand	287

(continued on following page)

Table of Contents

(continued from previous page)

China	291
India	302
Japan.....	312
South Korea	323
Other Asia/Pacific	330

OTHER REGIONS

Central & South America	341
Market Environment	341
Pharmaceutical Packaging Demand	345
Brazil	347
Other Central & South America	355
Eastern Europe	368
Market Environment	368
Pharmaceutical Packaging Demand	
by Product Group.....	371
Pharmaceutical Packaging Demand by Country.....	374
Africa/Mideast.....	382
Market Environment	382
Pharmaceutical Packaging Demand	386
Turkey	388
Other Africa/Mideast	394

INDUSTRY STRUCTURE

General	407
Market Share	411
Competitive Strategies.....	415
Mergers & Acquisitions.....	418
Licensing & Related Agreements.....	422
Product Development Activities.....	426
Marketing & Distribution	428
Manufacturing	430

COMPANY PROFILES

Alexander (James) Corporation.....	433
Amcor Limited	435
AmerisourceBergen Corporation.....	440
AptarGroup Incorporated.....	442
Becton, Dickinson and Company.....	446
Catalent Pharma Solutions.....	448
CCL Industries	450
Chesapeake Limited.....	454
Clondalkin Group.....	457
Constantia Flexibles Group.....	461
Dätwyler Holding	464
Gerresheimer Holdings	466
Global Closure Systems.....	471
Hindalco Industries	473
International Paper	475
IntraPac Group	477
Clöckner Pentaplast Group.....	479

Körber AG	482
McKesson Corporation.....	484
MeadWestvaco Corporation	486
Menasha Corporation	489
Mini Graphics	491
Nampak Limited.....	492
Palladio Zannini Industrie	
Grafiche Cartotecniche	494
Placon Corporation.....	495
Plastube Incorporated	496
Rexam plc.....	497
Reynolds Group.....	500
Ropack Incorporated	502
RPC Group.....	504
SCHOTT AG	507
3M Company	511
Unicep Packaging.....	513
United Drug plc	515
Vetter Pharma International	518
West Pharmaceutical Services.....	520
Wihuri Oy	524
Other Companies Mentioned in the Study.....	526

8 World Pharmaceutical Blister Packaging Demand by Type & Component	53
9 World Prefillable Syringe Demand by Region	64
10 World Prefillable Syringe Demand by Type	65
11 World Parenteral Vial & Ampul Demand by Region.....	72
12 World Parenteral Vial & Ampul Demand by Type.....	73
13 World Prefillable Inhaler Demand by Region	79
14 World Prefillable Inhaler Demand by Type	80
15 World Pharmaceutical Pouch Demand by Region.....	87
16 World Pharmaceutical Pouch Demand by Type.....	89
17 World Medication Tube Demand by Region	91
18 World Medication Tube Demand by Type.....	92
19 World IV Container Demand by Region.....	97
20 World IV Container Demand by Type.....	98
21 World Glass Pharmaceutical Bottle & Jar Demand by Region	103
22 World Glass Pharmaceutical Bottle & Jar Demand by Type.....	105
23 World Other Primary Pharmaceutical Container Demand by Region.....	106
24 World Other Primary Pharmaceutical Container Demand by Type.....	107
25 World Pharmaceutical Closure Demand by Region.....	113
26 World Pharmaceutical Closure Demand by Type.....	115
27 World Plastic Pharmaceutical Closure Demand by Type	116
28 World Other Pharmaceutical Closure Demand by Type	123
29 World Pharmaceutical Label Demand by Region.....	128
30 World Pharmaceutical Label Demand by Type.....	129
31 World Secondary Pharmaceutical Container Demand by Region.....	135
32 World Secondary Pharmaceutical Container Demand by Type.....	136
33 World Prescription Container Demand by Region.....	143
34 World Prescription Container Demand by Type.....	144
35 World Pharmaceutical Packaging Accessory Demand by Region	149
36 World Pharmaceutical Packaging Accessory Demand by Type.....	150
37 World Pharmaceutical Packaging Raw Material Demand by Type	157
38 World Plastic Pharmaceutical Packaging Resin Demand by Type	158

(continued on following page)

List of Tables

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 World Macroeconomic Indicators	5
2 World Gross Domestic Product	11
3 World Population	13
4 World Population 65 Years & Older.....	15
5 World Health Expenditures	18
6 World Pharmaceutical Demand by Therapeutic Class	21
7 World Pharmaceutical Shipments by Region..	24

OVERVIEW

1 World Pharmaceutical Packaging Demand by Region.....	32
2 World Pharmaceutical Packaging Demand by Product Group.....	37
3 World Primary Pharmaceutical Container Demand by Region.....	39
4 World Primary Pharmaceutical Container Demand by Type.....	41
5 World Plastic Pharmaceutical Bottle Demand by Region	44
6 World Plastic Pharmaceutical Bottle Demand by Type	45
7 World Pharmaceutical Blister Packaging Demand by Region.....	52

List of Tables

(continued from previous page)

NORTH AMERICA

1 North America: Pharmaceutical Packaging Indicators	169
2 North America: Pharmaceutical Packaging Demand by Type	171
3 United States: Pharmaceutical Packaging Indicators	176
4 United States: Pharmaceutical Packaging Demand by Type.....	179
5 Canada: Pharmaceutical Packaging Indicators	186
6 Canada: Pharmaceutical Packaging Demand by Type.....	189
7 Mexico: Pharmaceutical Packaging Indicators	193
8 Mexico: Pharmaceutical Packaging Demand by Type.....	195

WESTERN EUROPE

1 Western Europe: Pharmaceutical Packaging Indicators	201
2 Western Europe: Pharmaceutical Packaging Demand by Type	203
3 France: Pharmaceutical Packaging Indicators	209
4 France: Pharmaceutical Packaging Demand by Type.....	211
5 Germany: Pharmaceutical Packaging Indicators	217
6 Germany: Pharmaceutical Packaging Demand by Type	221
7 Ireland: Pharmaceutical Packaging Indicators	229
8 Ireland: Pharmaceutical Packaging Demand by Type.....	231
9 Italy: Pharmaceutical Packaging Indicators	237
10 Italy: Pharmaceutical Packaging Demand by Type.....	239
11 Spain: Pharmaceutical Packaging Indicators	246
12 Spain: Pharmaceutical Packaging Demand by Type.....	248
13 Switzerland: Pharmaceutical Packaging Indicators	253
14 Switzerland: Pharmaceutical Packaging Demand by Type.....	256
15 United Kingdom: Pharmaceutical Packaging Indicators	264
16 United Kingdom: Pharmaceutical Packaging Demand by Type	266
17 Other Western Europe: Pharmaceutical Packaging Indicators	273

18 Other Western Europe: Pharmaceutical Packaging Demand by Type	275
19 Other Western Europe: Pharmaceutical Packaging Demand by Country.....	276

ASIA/PACIFIC

1 Asia/Pacific: Pharmaceutical Packaging Indicators	287
2 Asia/Pacific: Pharmaceutical Packaging Demand by Type	290
3 China: Pharmaceutical Packaging Indicators	298
4 China: Pharmaceutical Packaging Demand by Type.....	300
5 India: Pharmaceutical Packaging Indicators	307
6 India: Pharmaceutical Packaging Demand by Type.....	309
7 Japan: Pharmaceutical Packaging Indicators	318
8 Japan: Pharmaceutical Packaging Demand by Type.....	320
9 South Korea: Pharmaceutical Packaging Indicators	326
10 South Korea: Pharmaceutical Packaging Demand by Type	328
11 Other Asia/Pacific: Pharmaceutical Packaging Indicators	333
12 Other Asia/Pacific: Pharmaceutical Packaging Demand by Type	335
13 Other Asia/Pacific: Pharmaceutical Packaging Demand by Country.....	336

OTHER REGIONS

1 Central & South America: Pharmaceutical Packaging Indicators	344
2 Central & South America: Pharmaceutical Packaging Demand by Type	346
3 Brazil: Pharmaceutical Packaging Indicators	351
4 Brazil: Pharmaceutical Packaging Demand by Type.....	353
5 Other Central & South America: Pharmaceutical Packaging Indicators.....	359
6 Other Central & South America: Pharmaceutical Packaging Demand by Type.....	361
7 Other Central & South America: Pharmaceutical Packaging Demand by Country	362
8 Eastern Europe: Pharmaceutical Packaging Indicators	371
9 Eastern Europe: Pharmaceutical Packaging Demand by Type	373
10 Eastern Europe: Pharmaceutical Packaging Demand by Country.....	374

11 Africa/Mideast: Pharmaceutical Packaging Indicators	386
12 Africa/Mideast: Pharmaceutical Packaging Demand by Type	387
13 Turkey: Pharmaceutical Packaging Indicators	391
14 Turkey: Pharmaceutical Packaging Demand by Type.....	393
15 Other Africa/Mideast: Pharmaceutical Packaging Indicators	397
16 Other Africa/Mideast: Pharmaceutical Packaging Demand by Type	399
17 Other Africa/Mideast: Pharmaceutical Packaging Demand by Country.....	400

INDUSTRY STRUCTURE

1 World Pharmaceutical Packaging Sales by Company, 2012	408
2 Selected Acquisitions & Divestitures	419
3 Selected Cooperative Agreements	424

List of Charts

MARKET ENVIRONMENT

1 World Pharmaceutical Shipments by Region, 2012.....	25
---	----

OVERVIEW

1 World Pharmaceutical Packaging Demand by Region, 2012.....	33
2 World Pharmaceutical Packaging Demand by Product Group, 2012.....	38
3 World Primary Pharmaceutical Container Demand by Type, 2012	42

INDUSTRY STRUCTURE

1 World Pharmaceutical Packaging Industry Market Share by Segment, 2012.....	412
--	-----

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

World Pharmaceutical Packaging Demand (\$90 billion, 2017)



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.

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.

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Sample Text, Table & Chart

WESTERN EUROPE

Spain: Pharmaceutical Packaging Demand

Demand for pharmaceutical packaging products in Spain almost \$1 billion in 2012, an increase of 1.5 percent annually from 2011. The increase is driven by over-the-counter and alternative medicine coupled with the growth in prescription drugs by the population. The limited growth in the level of pharmaceutical packaging is due to the new reference system.

**SAMPLE
TEXT**

Plastic bottles will account for the largest share of demand for pharmaceutical packaging products consumed in Spain based on applications in ethical, over-the-counter, and alternative medicine and nutritional preparations. Blister packaging will continue to be the second largest share of primary container demand, spurred by expanding uses as prescription packs and over-the-counter medications. Among all pharmaceutical packaging sold in Spain, closures, labels, and accessories that promote safer and more efficient drug administration and improved patient medication adherence will post the strongest growth opportunities. Included in this category will be prefillable inhalers and syringes, high barrier glass ampoules, 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, Novartis, and Sanofi all initiated major projects involving the expansion and modernization of their production sites. In addition, leading national drug manufacturer opened a new research and development center near Barcelona to focus on commercializing biotechnology-based drugs.

246

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TABLE V-12

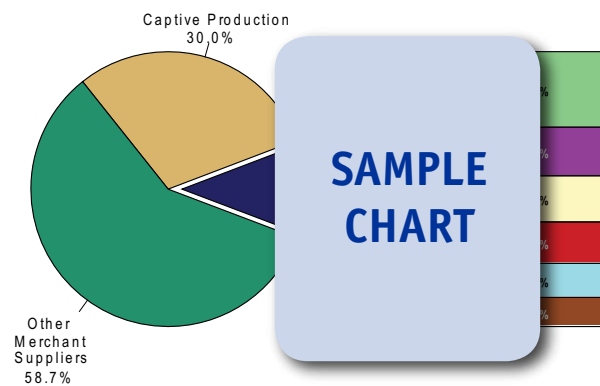
SPAIN: PHARMACEUTICAL PACKAGING DEMAND BY TYPE
(million dollars)

Item	2002	2007	2012	2017	2022
Pharmaceutical Shipments (bil \$)	100	100	100	100	100
\$ packaging/000\$ pharmaceuticals	3	3	3	3	3
Pharmaceutical Packaging Demand	0	0	0	0	0
Primary Containers:	0	0	0	0	0
Plastic Bottles	0	0	0	0	0
Blister Packaging	0	0	0	0	0
Prefillable Syringes	0	0	0	0	0
Parenteral Ampuls & Vials	0	0	0	0	0
Prefillable Inhalers	0	0	0	0	0
Pouches	0	0	0	0	0
Medication Tubes	0	0	0	0	0
IV Containers	0	0	0	0	0
Glass Bottles & Jars	0	0	0	0	0
Other Primary Containers	0	0	0	0	0
Closures	0	0	0	0	0
Labels	0	0	0	0	0
Secondary Containers	0	0	0	0	0
Prescription Containers	0	0	0	0	0
Packaging Accessories	0	0	0	0	0
% Spain	4	4	4	4	4
Western Europe Pharm Pkg Demand	100	100	100	100	100

**SAMPLE
TABLE**

CHART VIII-1

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

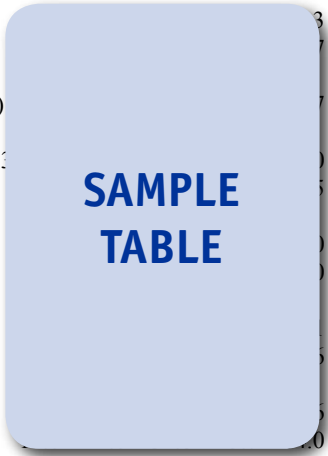


**SAMPLE
CHART**

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 \$)					



COMPANY PROFILES

Unicep Packaging Incorporated

1702 Industrial Drive
 Sandpoint, ID 83864
 208-265-9696
<http://www.unicep.com>

Annual Sales
 Employment

Key Products
 Key Products include contract pharmaceutical packaging



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

"... 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

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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