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# World Pharmaceutical Packaging

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Industry Study with Forecasts for **2019 & 2024**

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Study #3269 | July 2015 | \$6700 | 546 pages

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*India and China will form the fastest growing markets due to rapidly expanding drug-producing capabilities and the adoption of more stringent regulations aimed at improving the medicine quality and integrity.*

## World demand to rise 6.5% annually through 2019

World demand for pharmaceutical packaging products will increase 6.5 percent annually to over \$100 billion in 2019. Because of advanced and diverse drug-producing industries, almost 60 percent of global demand will come from 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. Russia, Turkey, Mexico, Iran, Argentina, and Brazil are among other developing markets that are expected to expand and diversify drug-producing industries and register above average gains in pharmaceutical packaging demand.

## US to remain largest national market

Over the long term, the US will continue to be the largest national pharmaceutical packaging 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.

## World Pharmaceutical Packaging Demand, 2019 (\$101.3 billion)



Based on broad contingents of proprietary and generic drug producers, Canada and Japan will continue to be significant consumers of a diverse array 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 inhalers among fastest growing products

Global demand for primary pharmaceutical containers will expand at the industry average pace through 2019. Prefillable syringes and parenteral vials will see above average growth as new injectable

therapies developed through biotechnology and other advanced life sciences 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. Blister packaging will comprise the second largest selling group of primary pharmaceutical 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. Prefillable inhalers will post above average demand gains as the number of chronic asthma, allergy, and migraine patients treated with inhalation drugs rises globally.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### India: Pharmaceutical Packaging Demand

Demand for pharmaceutical packaging products in India is expected to increase to \$1.5 billion in 2019. The most standard packaging and packaging solutions will continue to dominate the domestic pharmaceutical packaging market. Demand for high value pharmaceutical packaging is expected to increase as an increase in the number of clinical trials in the country by multinational pharmaceutical companies, Pfizer, and Teva.

Pharmaceutical are among the companies that have established clinical testing operations in India. The country's large, aging population forms an enormous base from which to select clinical trial subjects. Among specific types of pharmaceutical packaging products in India, plastic bottles will continue to dominate the packaging market for oral medication. However, blister packaging will see fast growth as drug makers pursue export opportunities in countries requiring blister medication packaging. Demand for prefillable syringes and vials will increase rapidly as industry capacity for injectable packaging expands.

A recently imposed ban on the use of plastic containers in the packaging of liquid medication for the domestic market will keep Indian demand for glass pharmaceutical bottles and jars rising. Nonetheless, anticipated improvements in the properties of resin materials will likely lead to the eventual rescinding of this ban. New regulations designed to combat drug counterfeiting will boost the demand for specialized labels, films, and accessories that incorporate electronic tags, holograms, images, or other features that validate the contents of primary containers. The market for most other types of pharmaceutical packaging in India, including closures, secondary containers, tubes, and syringes, will gain upward momentum from expanding drug production and

316

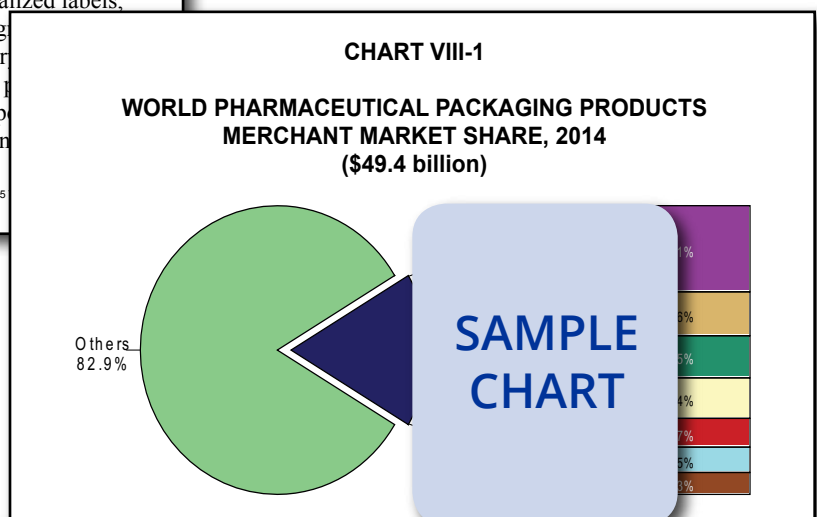
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**TABLE VI-6**

**INDIA:**  
**PHARMACEUTICAL PACKAGING PRODUCT DEMAND BY TYPE**  
(million dollars)

Item	2004	2009	2014	2019	2024
Pharmaceutical Shipments (bil \$)					
\$ packaging/000\$ pharmaceuticals					
Pharmaceutical Packaging Demand					
Primary Containers:					
Plastic Bottles					
Blister Packaging					
Prefillable Syringes					
Parenteral Vials & Ampuls					
Prefillable Inhalers					
Pouches					
Medication Tubes					
Glass Bottles & Jars					
IV Containers					
Other Primary Containers					
Closures					
Labels					
Secondary Containers					
Prescription Containers					
Packaging Accessories					
% India					
Asia/Pacific Pharm Pkg Demand					

Source: The Freedonia Group, Inc.



## Sample Profile & Table, & Study Coverage

### COMPANY PROFILES

#### Global Closure Systems

220, Bureaux de la Colline  
 92213 Saint Cloud Cedex  
 France  
 331-78-76-44-41  
<http://www.gc>

Zeller Plastik  
 1515 Franklin  
 Libertyville, I  
 847-247-7900

Annual Revenue (in million USD) (Company)

Employment:

Key Products: child-resistant closures and droppers, & tamper-evident screw caps

Global Closure Systems (GCS) designs and manufactures plastic and metal closures for the food, beverage, wine and spirits, pharmaceutical, cosmetic, personal care, household, and industrial markets. The principal geographic markets served by GCS are Europe, the Americas, and Asia. The Company is owned by European private equity firm PAI Partners (France).

GCS is involved in the world pharmaceutical packaging industry through the production of child-resistant closures and droppers, and tamper-evident screw caps. Child-resistant closures include SAFE VISTOP, PHARMASAFE, and MEDI-LOC types for syrup and liquid pharmaceuticals; and CLIC-LOC varieties for syrup, liquid, and solid-dose pharmaceuticals. These closures are also available with tamper evident features. The Company's droppers are made in VISTOP styles for aqueous and alcohol solutions; and GL18 vertical models for

SAMPLE PROFILE

TABLE VI-5

### INDIA: MARKET INDICATORS

Item	2004	2009	2014	2019	2024
Total Population (million)					
% 65 years & older					
Population 65 Years & Older (million)					
\$ GDP/capita					
Gross Domestic Product (bil 2013\$)					
\$ health expenditures/capita					
Health Expenditures (bil \$)					
\$ pharm/000\$ health expenditures					
Pharmaceutical Demand (bil \$)					
net exports					
Pharmaceutical Shipments (bil \$)					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

### STUDY COVERAGE

This Freedonia study, *World Pharmaceutical Packaging*, offers historical data (2004, 2009, 2014) plus forecasts (2019, 2024) for supply and demand, as well as demand by product, in 6 regions and 16 countries. The study also considers market environment factors, examines the industry structure, evaluates company market shares and profiles 36 industry participants worldwide.





## Related Studies

### Active & Intelligent Packaging

This study analyzes the US active and intelligent packaging industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., gas scavengers, corrosion control packaging, desiccants, susceptor packaging, color indicator packaging, time-temperature indicators) and market (e.g., food, beverages, pharmaceuticals, primary metals, motor vehicles, electronics). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3338.....October 2015.....\$5300

### Converted Flexible Packaging

This study analyzes the US converted flexible packaging industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by material, product (e.g., bags, pouches), food packaging market (e.g., meat, baked goods, snack food, produce, candy and confections, frozen food, dairy products, pet food) and nonfood packaging market (e.g., pharmaceuticals, medical products, paper and textile products). The study also considers market environment factors, evaluates company market share and profiles industry players.

#3333.....October 2015.....\$5500

### Labels

US label demand will rise 3.8 percent annually to \$19.7 billion in 2019. In-mold, stretch sleeve and heat-shrink labels will grow the fastest. Digital printing will continue to displace traditional label printing methods. Primary packaging will remain the largest function, while secondary labeling and mailing/shipping labels will pace gains. This study analyzes the \$16.3 billion US label industry, with forecasts for 2019 and 2024 by material, application method, printing technology, and function. The study also evaluates company market share and profiles industry players.

#3291.....June 2015.....\$5500

### World Caps & Closures

World cap and closure demand will rise 5.6 percent yearly to \$58 billion in 2019. The Asia/Pacific and Africa/Mideast markets will grow the fastest, while North America will remain a leading outlet. The beverage market will be driven by bottled water. In wine bottles, the shift toward metal screw caps and plastic stoppers will continue. This study analyzes the \$44.3 billion world cap and closure industry, with forecasts for 2019 and 2024 by material, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3259.....April 2015.....\$6500

### Pharmaceutical Packaging Products

Demand for pharmaceutical packaging products in the US will increase 4.9 percent annually to \$22.1 billion in 2018. Led by prefillable syringes, vials, and premixed IV systems, parenteral containers will post the fastest growth in both revenue and unit demand as new injectable biological and bioengineered therapies are introduced into the marketplace. This study analyzes the \$17.4 billion US pharmaceutical packaging industry, with forecasts for 2018 and 2023 by material and market. The study also evaluates company market share and profiles industry players.

#3193.....July 2014.....\$5300

## 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 and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

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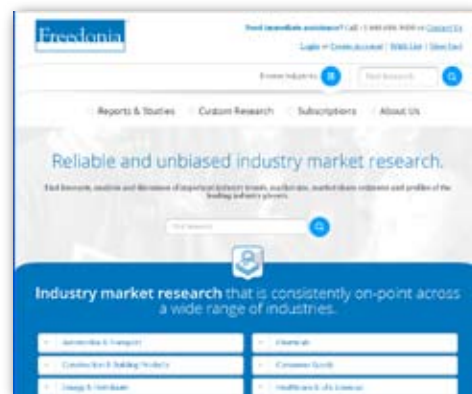
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