Growth in aseptic packaging will be driven by advantages in processing, as well as the ability of products in aseptic packaging to be distributed and stored at ambient temperatures. Demand gains will also be based on drug sterility requirements. The increased availability of biotechnology-based injectable drugs necessitates aseptic filling and packaging as such drugs tend to be heat-sensitive, making the high temperature utilized in terminal sterilization processes unfeasible.

Pharmaceuticals comprised the largest market for aseptic packaging in 2015. Through 2020, growth will be aided by opportunities with heat-sensitive advanced injectable and infusion therapies and trends toward self-administration of injectable drugs for chronic conditions. Prefillable syringes, which help eliminate dosing errors, will post the fastest gains among all aseptic packaging product types.

Beverage market to remain dominant
Beverage market growth will slightly outpace the overall average, supported by continued expansion in beverage production along with increased adoption of aseptic packaging in dairy-based beverages and other ready-to-drink beverages such as protein shakes and iced coffee, and with concentrates for smoothies and cocktails. Sustainability benefits, derived from storing and transporting perishable beverages at ambient temperatures, will also promote gains. Advances will be restrained by maturity in fruit beverage uses, consumer expectation of milk in refrigerated cases, and the dominance of hot-fill packaging. Similar sustainability and storage benefits will drive demand in the food market. In addition, opportunities will be strengthened by expanding applications with liquid, low-particulate, and pumpable foods, often via the replacement of metal cans and glass jars.

Aseptic cartons, bags & pouches to post strongest growth
Aseptic cartons will post solid increases, fueled by growing dairy beverage applications, favorable consumption trends in ready-to-drink premium wellness beverages, and product differentiation advantages. Prospects for bags and pouches will be driven by opportunities for bag-in-box and other large format aseptic bags used in the packaging of products sold to the foodservice and food processing industries. Plastic bottle demand growth will be in line with the overall average, the result of expanding food and beverage applications, especially in the dairy market. Cups are expected to record below average growth based on increased competition from pouches in the baby food and processed fruit and vegetable segments.

Study coverage
This study analyzes the US aseptic packaging market. It provides historical data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by product (plastic bottles, vials and ampuls, prefillable syringes, bags and pouches, cartons, cups, glass bottles) and market (pharmaceuticals, food, beverages). The study also considers market environment factors, assesses industry structure, evaluates company market share and profiles 36 US industry competitors.
Aseptic Packaging
US Industry Study with Forecasts for 2020 & 2025

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Beverage aseptic packaging applications are forecast to increase 7.1 percent annually to $1.5 billion in 2020. Growth will be based on continued expansion in beverage production along with increased adoption of aseptic packaging in dairy-based beverages, other ready-to-drink beverages such as protein shakes and iced coffee, and with concentrates for smoothies and cocktails. Solid increases for beverage applications will also result from cost and sustainability benefits of aseptic packaging, especially in terms of offering the ability for dairy and other perishable beverages to be transported and stored at ambient temperatures. This benefit will support growth for aseptically packaged beverages in channels such as vending machines and foodservice establishments and will also stimulate export opportunities. Advances will be restrained by the maturity of the fruit beverage market, consumer expectations of milk in refrigerated cases, competition from refrigerated cartons in nondairy milk uses, and the dominance of hot-fill packaging, which has a long established base.

Fruit beverages are by far the largest application for aseptic packaging in the beverage market, accounting for more than 60 percent of demand in 2015. Dairy beverages and nondairy milk beverages together represented an additional 22 percent of demand, with the remainder of demand coming from such beverages as nondairy protein shakes, vegetable juices, flavored and unflavored waters, sports drinks, wine, smoothies, bar mixes, and beverage concentrates.

Cartons are the leading aseptic container for beverages, accounting for 60 percent of beverage market demand in 2015, with plastic bottles representing an additional 23 percent of demand. Bags and pouches, largely bag-in-box types, are also significant and are used primarily for products in the foodservice market. Aseptic cups see niche usage with...
Related Studies

Pouches
Demand for pouches in the US will grow 4.4 percent annually through 2020 to $10.1 billion. Growth will be driven by the introduction of pouch packaging into new markets and the integration of high value features, such as resealable closures and spouts, in more mature markets. Stand-up pouches will remain the fastest growing type. This study analyzes the $3.2 billion US pouch packaging industry, with forecasts for 2020 and 2025 by product type, feature, market, and production method. The study also evaluates company market share and profiles industry players.

Wine Packaging
Demand for wine packaging in the US will increase 4.4 percent annually to $3.0 billion in 2019. Glass bottles will remain dominant but will face increasing competition from alternative formats and sizes, such as single-serving plastic bottles, aseptic cartons, aluminum cans, and cups and goblets, as well as bag-in-box packaging. This study analyzes the $2.4 billion US wine packaging industry, with forecasts for 2019 and 2024 by container, closure, accessory and bulk packaging type. The study also evaluates company market share and profiles industry competitors.

World Pharmaceutical Packaging
World demand for pharmaceutical packaging will rise 6.5 percent annually to over $100 billion in 2019. The Africa/Mideast region will be the fastest growing market, followed by the Asia/Pacific region and Central and South America. Primary containers will remain the dominant segment, led by prefillable syringes and parenteral vials. This study analyzes the $74 billion world drug packaging industry, with forecasts for 2019 and 2024 by product for six world regions and 16 major countries. The study also evaluates company market share and profiles industry players.

Beverage Containers
US beverage container demand will rise 1.9 percent yearly to 283 billion units in 2019, valued at $31.5 billion. Plastic will remain the dominant and fastest growing material, supported by increased consumption of bottled water, which will become the leading beverage container market by 2019. However, growth in plastic bottles will slow due to environmental concerns. This study analyzes the 258 billion unit US beverage container industry, with forecasts for 2019 and 2024 by material and market. The study also evaluates company market share and profiles industry players.

Freedonia’s methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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The Freedonia Group 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:

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- Energy & Petroleum
- Industrial Components
- Healthcare & Life Sciences
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- Packaging
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