INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Freedonia®

Aseptic Packaging

Industry Study with Forecasts for 2020 & 2025

Study #3386 | March 2016 | $5200

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.

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MARKETS

Aseptic Packaging Demand

Beverage aseptic packaging applications are forecast to incre
in 2020. Growth will be basec
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increases for beverage applicat
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and will also stimulate export opportunities. Advances will be res
by the maturity of the fruit beverage market, consumer expectatio
of milk in refrigerated cases, competition from refrigerated carton
nondairy milk uses, and the dominance of hot-fill packaging, whic
long established base.

Fruit beverages are by far the largest application for aseptic p
ing in the beverage market, accounting for more than 60 percent o
demand in 2015. Dairy beverages and nondairy milk beverages to
represented an additional 22 percent of demand, with the remaind
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

TABLE III-1

ASEPTIC PACKAGING DEMAND BY TYPE
(million dollars)

Item	2005	2010	2015	2020	2025
Total Packaging Demand (bil $)					
% aseptic					
Aseptic Packaging Demand					
Plastic Bottles					
Prefillable Syringes					
Vials & Ampuls					
Bags & Pouches					
Cartons					
Cups					
Glass Bottles					
cents/unit					
Aseptic Packaging Demand (bil units)					

Source: The Freedonia Group

TABLE IV-3

PHARMACEUTICAL MARKET FOR ASEPTIC PACKAGING
(million dollars)

Item	2005	2010	2015	2020	2025
Pharmaceutical Shipments* (bil $)					
$ pkg/000$ pharmaceuticals					
Pharmaceutical Aseptic Pkg Demand					
Prefillable Syringes					
Vials & Ampuls					
Bottles:					
Plastic					
Glass					
IV Bags					
% pharmaceuticals					
Total Aseptic Packaging Demand					

* includes shipments originating in Puerto Rico

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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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 $8.2 billion US pouch 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.

#3383.............. February 2016 .... $5400

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.

#3308................August 2015................. $5300

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.

#3269.................. July 2015 .... $6700

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.

#3297..................June 2015................... $5300

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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

About The Freedonia Group

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:

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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