INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Pharmaceutical Packaging Products

US Industry Study with Forecasts for **2018 & 2023**

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Pharmaceutical Packaging Products

US Industry Study with Forecasts for *2018 & 2023*

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Pharmaceutical Packaging Products

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Led by prefillable syringes, vials, and premixed IV systems, parenteral containers will post the fastest growth in both revenue and unit demand for pharmaceutical packaging products.

US demand to rise 4.9% annually through 2018

Demand for pharmaceutical packaging products in the US will increase 4.9 percent annually to $22.1 billion in 2018. Primary containers will make up two-thirds of the total, with the remainder generated by closures, secondary containers, labels, and other packaging accessories. 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 and infusion therapies based on biotechnology and other advanced life sciences are introduced into the marketplace. Demand for these containers will exceed that for blister packaging and will generate the second largest share of value demand among primary drug containers in 2018.

US Pharmaceutical Packaging Product Demand, 2018
($22.1 billion)

Plastic bottles to remain largest product segment

Reflecting usage in the bulk and prescription dose packaging of oral ethical drugs and the packaging of solid dose oral over-the-counter medicines in large quantities, plastic bottles will continue to record the largest demand among primary pharmaceutical containers, reaching $4.6 billion in 2018. Blister packaging will remain the leading competitor to plastic bottles in solid oral drug applications and, overall, will post above average revenue growth based on adaptability to unit dose and clinical trial dosage formats.

The value of demand generated by prefillable inhalers will expand somewhat faster than the overall average of primary pharmaceutical containers as the devices build applications in the delivery of asthma, COPD, and, most recently, insulin therapies. By contrast, the market for pharmaceutical pouches will grow at a slightly below average pace as uses remain limited to the unit dose packaging of transdermal, powder, and topical medicines. Advances in aesthetic and barrier properties will keep tubes a leading primary package for topical medication. However, the value of demand posted by these containers will increase at a comparatively slow pace due to competition from plastic dispensing bottles and unit dose pouches.

Dispensing closures among fastest growing accessories

Demand for pharmaceutical packaging accessories will expand at a slightly slower annual pace than primary containers through 2018. Dispensing closures, parenteral stoppers, security-enhanced labeling, and intelligent components will see the fastest revenue growth. Dispensing closures will see increased use in pharmaceutical applications as they offer improved functional properties. Parenteral stoppers will derive most revenue growth from new drug introductions, upward trends in shipments of injectable therapies, and advantages in drug storage safety.

Sample Text, Table & Chart

TABLE IV-15

IV CONTAINER DEMAND BY TYPE

Item	2003	2008	2013	2018	2023
Parenteral Pharmaceutical Shpts (bil $)					
$ IV containers/000$ shipments					
IV Container Demand (mil $)					
Semi-Rigid Plastic IV Containers					
Premixed IV Minibags					
Glass IV Containers					
cents/unit					
IV Container Demand (mil units)					
Semi-Rigid Plastic IV Containers					
Premixed IV Minibags					
Glass IV Containers					

SAMPLE TABLE

PRIMARY PHARMACEUTICAL CONTAINERS

Plastic Bottles

The US market for plastic pharmaceutical bottles is fore... increase ... billion in 2018, represe... billion u... ablets, caplets, capsules will mak... and. Additionally, plas... will con... usage as primary contai... lected to... es as well as prescriptio... containe...

SAMPLE TEXT

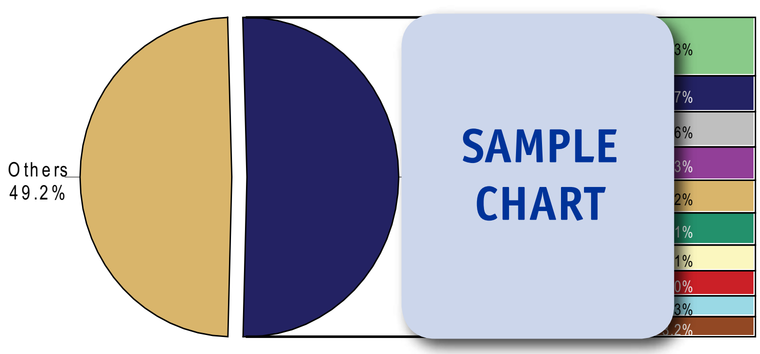
Plastic pharmaceutical bottles span five major product c... -- standard bottles; dispensing bottles; jars; cans, and prescri... Standard bottles consisting of oblongs, ovals, squares, and ro... the broadest range of applications, which extend to virtually all solid and liquid dosage formulations of oral drugs, herbal medicines, dietary supplements, and nutritional preparations. Uses of other plastic bottles are narrower in scope. Dispensing bottles provide a combination packaging and delivery system for liquid, spray, and low viscosity medication administered orally or topically.

Plastic jars compete against tubes and wide-mouth glass containers in the packaging of topical drugs. Plastic cans are employed primarily as containers for powder and lyophilized dosage formulations of oral and topical medicines. Included in this group are laxatives; cough, cold, and flu preparations; and medicated powders. Lastly, plastic pres... als compete against blister packaging in the dispensing of or... tion drugs directly to patients.

Generally, limited adaptability to unit dose and adheren... will represent the major moderating influence on long-term g... plastic pharmaceutical bottle demand. The containers do no... viable, cost-effective option for meeting regulations and sta... require the unit dose packaging and bar coding of institution...

CHART VII-1

PHARMACEUTICAL PACKAGING PRODUCTS, MERCHANT MARKET SHARE BY COMPANY ($9.7 billion, 2013)



Pharmaceutical Packaging Products

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Sample Profile, Table & Forecast

TABLE V-2

PHARMACEUTICAL CLOSURE DEMAND BY TYPE

Item	2003	2008	2013	2018	2023
Pharmaceutical Shipments (bil $)					
$ closures/000$ shpts					
Pharmaceutical Closure Demand (mil					
Specialty Closures					
Child-Resistant Closures					
Standard Closures					
cents/unit					
Pharma Closure Demand (mil units)					
Specialty Closures					
Child-Resistant Closures					
Standard Closures					

SAMPLE TABLE

COMPANY PROFILES

Centor
1899 North Wilkinson Way
Perrysburg, OH 43551
567-336-2900
http://www.ce

Annual Sales:
Employment:
Key Products: ... ated closures

Centor is ... iners and related closures for ... ny was formed in May 2014 a ... Kingdom) purchased the Prescription Retail Packaging division (US) and Pharmaceutical Devices division (France) of Rexam plc (United Kingdom) for $805 million. In July 2014, the Prescription Retail Packaging division began operating as Centor, and the Pharmaceutical Devices division began operating as Nemera.

The Company is active in the US pharmaceutical packaging industry via the manufacture of plastic vials and other containers and related closures suitable for use in a variety of retail, mail order, central fill, and repackaging applications. Centor's plastic vials include PLASTAINER amber types with snap-on caps, 1-CLIC amber models with child-resistant and senior-friendly closures, and SCREW-LOC amber varieties that feature closures designed to be opened when pushed down and turned. Additional plastic containers from the Company include dropper bottles in 0.5-, 1-, and 2-ounce (oz) models, ointment jars in sizes ranging from 0.5 to 16 oz, 1-oz applicator bottles, and amber oval bottles in capacities of 1 to 16 oz.

Centor conducts manufacturing operations at a plant in Berlin, Ohio. As of February 2014, this facility had the capacity to produce

280

SAMPLE PROFILE

STUDY COVERAGE

Pharmaceutical Packaging Products is a Freedonia industry study that offers historical data (2003, 2008, 2013) plus forecasts for 2018 and 2023 for pharmaceutical container and accessories demand by type and market. This study also assesses key market environment factors, evaluates company market share and profiles 39 US industry competitors.