

Adherence Packaging Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The adherence packaging market is expected to register a CAGR of 7.22% over the forecast period (2022-2027). Adherence packaging is primarily used in medical services to replace burdensome medication planners and organize drug consumption in the way patients do. It is given to the patient during the day or as time passes to make it easier to take their prescription as advised by their doctor.

Key Highlights

Poor adherence to pharmacological therapy and illness management has been linked to emergency hospitalization in individuals with chronic obstructive pulmonary disease. Due to these factors, adherence packaging is one of the growing needs for such patients and is anticipated to witness significant growth in the coming years.

The growing desire to reduce drug wastage is contributing to the growth of the adherence packaging industry. Medication waste has a significant financial impact on the healthcare system and has negative environmental consequences. However, high implementation, installation, and maintenance expenses, on the other hand, may limit the market's total growth at a global level. Recent developments about digital capturing dispense events via near-field communication (NFC) or radio frequency identification (RFID) is being incorporated into packaging for verification on similar lines. The unit-dose blisters allow passive, active, and interactive features to combat the opioid epidemic and improve pharmaceutical safety. Passive elements refer to graphic or text reminders and warnings. Dynamic features use electronics for reminders or alarms in case of a shortened dosing period. Moreover, interactive features enable the patients to respond to prompts from the packaging in the form of recording doses and timing to curb addictive behavior.

Several companies are undertaking initiatives, such as product launches and partnerships, to gain a competitive edge in the studied market. For instance, in January 2021, Jones Healthcare Group, a developer of advanced packaging and medication dispensing solutions, announced the addition of first-of-its-kind sustainable packaging for pharmacies to its Qube and FlexRx

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medication adherence product lines. The Qube Pro, FlexRx One, and FlexRx Reseal help pharmacies and patients reduce their environmental footprints.

Meanwhile, on the vendor front, Acute Technology, a tech-based medication adherence provider, has been stressing the use of Hydra Communications Gateway. This may enable smartphone users to facilitate the electronic monitoring of dosages. This effectively addresses the lack of control of the medication supplied through weekly medicine trays. However, pharmaceutical companies taking centre stage in the COVID-19 fight, such as Gilead and Eli Lilly, are seeing positive growth on the stock market and a new burst of innovation in the infectious disease landscape as the race for treatment approval for a COVID-19 therapy is taking off, which is expected to boost the adherence packaging market significantly.

Adherence Packaging Market Trends

Multi-dose Packaging is Expected to Witness Significant Growth

The importance of medication adherence and the benefits of synchronizing those medications have led to the development of multi-dose packages. The benefits of multi-dose blister cards include setting up dosage time to eliminate confusion, more natural self-medication, and cutting down the number of visits to the pharmacy per month. Multiple studies have proven improved adherence and health outcomes, combined with multimed blister packs and medication therapy management (MTM).

A survey conducted by Omnicell suggested that patients assigned to the multimed packaging groups accounted for medication adherence rates of 80% initially, and they even accounted for 90% adherence rates by the completion of the trial. Alternatively, patients assigned to the pill bottle-only group accounted for an adherence rate of 56%. Omnicell offered multimed blister cards to Holyoke Health Center. The health center used Omnicell's SureMed+, a seven-day, four-time pass, cold-seal, and bi-fold card. In May 2021, Euclid introduced a multi-dose packaging system that boosts adherence and satisfaction for two Arkansas pharmacies. The company's Axial multi-dose pouch packaging machines promote adherence and simplify the process for the patient by pouch packaging medications and labeling with appropriate consumption time. The Axial RMD-144 has only a 2-by-2-foot footprint, making it ideal for pharmacies with limited space.

Furthermore, e-commerce players are observed to have been expanding convenience, compliance, and customized healthcare packaging for the elderly population. Last year's Amazon's purchase of the online pharmacy, PillPack, suggests the need for online medication delivery, thus indicating the potential for multimed packs to be demanded. The multi-dose packaging, amid the COVID-19 outbreak, has to ensure a reduced amount of 'touchpoints' for processing a patient's prescriptions while avoiding confusion associated with self-medicating.

North America Dominates the Market

The North American region is developed with prosperous economies, aging population segments, and advanced medical delivery systems. Still, the countries vary measurably in population size, healthcare spending intensities, aggregate gross domestic product (GDP) levels, and the structure of health insurance plans. With an advanced primary medical community, extensive medical and life science research activities, high healthcare spending intensity, and large pharmaceutical and medical supply and device industries, the United States accounts for one of the world's largest geographical markets for adherence packaging products.

Further, the United States is witnessing improved medication adherence in the correctional setting. The incarcerated population in most correctional facilities relies on an outside pharmacy to fill their prescriptions. An onsite pharmacist may be provided in some situations. However, such staff is often restricted, relying on a centralized location to supply drugs and an onsite nurse manager or similar to dispense. This strengthens the case for dispensing administration systems that are low-effort for personnel while yet

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being well-managed to ensure patient adherence.

In February 2022, CuePath Innovation, a provider of medication adherence solutions for the home healthcare sector, announced the release of its second-generation suite of remote patient care medication adherence monitoring tools that include Smart Blister Packaging Solution. The announcement comes with the launch of the company's critical care project with Wellness Pharmacy Group, which will provide medication monitoring and adherence support for patients on complicated regimens. The program's purpose is to guarantee that patients with complex medical conditions, such as renal and transplant patients, stick to their medications as close as possible.

Also, as per Parata Systems, non-adherence to medication, on average, costs USD 300 billion/year in the United States. Pouch packaging has reduced the cost of care and improved patient outcomes. With the growing presence of strip packaging in the market, patient awareness is expected to pressurize pharmacies without proper packaging to be left behind. The company launched Parata PASSTM 36, targeting pharmacies. Parata Systems, being a provider of pharmacy automation systems, including vial-filling, adherence packaging, and workflow and patient experience solutions, launched a pouch packager named PASSTM 36.

Adherence Packaging Market Competitor Analysis

The adherence packaging market is moderately competitive and consists of a few significant players. Companies like Cardinal Health Inc., WestRock Company, Omnicell Inc., Parata Systems LLC, and Keystone Folding Box Co., among others, hold substantial market shares. The market is also witnessing multiple product launches and partnerships.

April 2022 - Schreiner MediPharm has launched its upgraded Smart Blister Wallet, a digitally-enabled tool that allows pharmaceutical manufacturers to track compliance in their clinical trial participants automatically and with greater flexibility.
July 2021 - Cardinal Health launched Cardinal Health NavixRx™ Compliance Packaging, which provides independent pharmacies with a solution to outsource compliance packaging for patients taking two or more prescriptions daily. Furthermore, the packaging facility is fully operational in Lewisville with proximity to a Cardinal Health distribution center and the Dallas Fort Worth and Alliance airports, providing supply and logistical advantages for service to pharmacies nationwide.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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