

Pharmaceutical Glass Vials and Ampoules Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Pharmaceutical Glass Vials and Ampoules Market is anticipated to grow at a CAGR of 7.4% over the forecast period. The stringent law's introduction enhances the quality and integrity of domestically manufactured drugs, primarily leading to increased glass usage as a material for pharmaceutical packaging products. Also, the global demand for pharmaceutical glass vials increased due to the need for the COVID-19 vaccine.

Key Highlights

The growing pharmaceutical industry is aiding the market's growth. The demand for pharmaceutical glass vials and ampoules is arising in densely populated countries. The increasing pharmaceutical production in these countries is further increasing the demand. Some factors, such as the constituents and drug content, require them to get packaged in a nonreactive container. Increasing lifestyle diseases (like diabetes) and consumption of biopharmaceuticals, vaccines, and insulin, especially in countries in the Asia-Pacific, Latin America, and Eastern Europe, are likely to foster growth in ampoules use during the forecast period. Also, glass vials and ampoules offer high transparency, which enables easy inspection of their contents and higher protection because they are relatively impermeable to air and moisture and chemically resistant to most medicinal products. A significant volume of glass vials and ampoules are manufactured from borosilicate glass. The product demand is increasing rapidly, primarily owing to its inert properties, which other conventional materials cannot offer.

The growing complexity of drugs and the increasing diseases, such as diabetes, are expected to drive the vials and ampoules growth, primarily driven by increased consumption from emerging markets, such as China and India. The World Health Organization (WHO) states around 422 million people have diabetes. Also, factors, such as the rise in the medical care cost, due to incorrect medicine consumption and the growing inclination of various end-users, such as hospitals and drug manufacturers, are expected to drive the glass vials to use during the forecast period.

Vendors in the market have tried to help as much as possible during the coronavirus outbreak. For instance, Corning supplied its

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products, from glass tubing for diagnostic test kits to vials for clinical drug trials for vaccines, to provide Corning Vialor glass packaging and fill the gap for the projected drug shortages. The company also added glass packaging or any need for consumables from its Life Sciences portfolio for vaccine process development.

However, setting up the manufacturing unit for this packaging product is capital-intensive and involves using large furnaces and machines. They are also vulnerable to easy breakage. Besides, other alternatives like lightweight products are available. Factors such as these may hamper the growth prospects of the pharmaceutical glass and ampoules market during the forecast period. There was a mixed response from the global pharma industry about continuing business with Russia after it invaded Ukraine. Many drugmakers have suspended operations and deferred investments in Russia. AbbVie, an American biopharma company, suspended its aesthetic products operations and paused new clinical trials in Russia. Pfizer, Bayer, Sanofi, and others have deferred new investments or development in the country. Energy uncertainty in Europe is expected to inflate the cost of glass packaging, as well. Users, across the globe can expect continued upward pricing pressure from the energy-intensive industry.

Pharmaceutical Glass Vials & Ampoules Market Trends

Commodity Value of Glass Increased with Recyclability

Glass is chemically durable and is best suited to sustain various chemical compositions. Also, glass vials and ampoules provide enhanced transparency, which allows easy inspection and monitoring of their contents. It further enables protection because it is relatively impervious to most medicinal products' air, moisture, and chemical resistance.?

Glass makes up the majority of waste, and pharmaceutical packaging makes up a minor fraction of waste. Glass packaging is 100% recyclable, making it a desirable packaging choice in terms of the environment. Additionally, tinted glass can shield its contents from ultraviolet rays and particular wavelengths, such as amber and red glass. Glass ampoules and vials are the perfect material for pharmaceutical packaging since they can be easily sterilized with heat.?

Furthermore, strict government regulations regarding the restrictions on PET material usage for pharmaceutical packaging further increase the glass packaging attractiveness for the pharmaceutical industry. For instance, the Minister of Environment, Forestry, and Fisheries in South Africa announced the government was considering introducing a new policy to address single-use plastics use and their disposal management. As part of this process, discussions will be held with the retail, pharmaceutical, cosmetics, and packaging sectors.

Piramal Enterprise announced employing recycled glass and eco-friendly power sources to lower overall energy usage and carbon impact, promoting a safer and greener workplace. It recently created thin, lightweight glass packaging for pharmaceuticals, reducing the company's use of raw materials and energy even more.

Gerresheimer also committed to a sector-wide sustainability trend. For more than ten years, the company is manufacturing glass in Belgium utilizing a significant amount of post-consumer recycled (PCR) material. Further, during the COVID-19 pandemic, the European and US-based glass trade organizations reminded consumers, manufacturers, and municipalities that recycling is essential and needed even during the COVID-19 health crisis.

Moreover, the European Container Glass Federation FEVE encouraged governments to continue recycling programs, especially during this critical time, so glass manufacturers can remake new safe products to support the global health system across the food, beverage, and pharmaceutical industries.

North America is Expected to Hold a Major Share of the Market

The United States primarily dominates the pharmaceutical market in consumption and development. The region's demand for vials and ampoules is constantly advancing with the growing complexity of drugs and increasing health problems, such as

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diabetes. Furthermore, the vaccines and medications needed to prevent diseases like COVID-19 have also increased the demand for vials in the region. According to the STAT, prescription drug spending in the nation is estimated to be USD 600 billion by 2023, further expected to drive the market for glass vials and ampoules in the country.

The North American region is one of the largest regions for the pharmaceutical packaging industry owing to its large pharmaceutical manufacturing base and the ability to introduce technological advancements to pharmaceutical packaging. According to the association for packaging and processing technologies (PMMI), more than 700 North American manufacturers of equipment, components, and materials for processing and packaging are present. The US drug regulator had given clearance to various companies to speed up COVID-19 vaccine output with more oversized vials.

In January 2021, Pfizer discovered an extra dose in every vial, which means that pharmacists got an additional vaccine dose out of Pfizer vials that were supposed to contain only five. Earlier, the company committed to providing 200 million doses of the COVID-19 vaccine by the end of July. However, they will be providing fewer vials than once expected for the United States due to the extra dose.

Similarly, Novavax received USD 1.6 billion, and Sanofi Pasteur got around USD 2.07 billion to support their COVID-19 vaccine development. It is expected to increase the demand for vials as a part of the pharmaceutical packaging requirements of vaccines. As of March 2021, according to the US Department of Health and Human Services, BARDA (Biomedical Advanced Research and Development Authority), funding for the development of COVID-19 vaccines in the US was USD 5.9 billion for Pfizer/BioNTech, USD 5.8 million for Moderna and NIAID, and USD 1.9 billion for Johnson & Johnson. Such initiatives by the companies and the government in the region are expected to increase the demand for Pharmaceutical Glass Vials and Ampoules in the US market.

Pharmaceutical Glass Vials & Ampoules Market Competitor Analysis

The Pharmaceutical Glass Vials and Ampoules Market is highly competitive, owing to multiple players operating in domestic and international markets. The market is moderately concentrated, with major players like Schott AG, Gerresheimer AG, and Nipro Corporation adopting strategies, like product innovation, mergers, acquisitions, and expansion, to expand their reach and increase their production capabilities.

In July 2022, Japan's Nipro invested KN 100 million (USD 14 million) in a new glass packaging plant for the pharmaceutical industry in Croatia. A new factory that will produce glass ampoules and vials to package life-saving drugs was inaugurated in Zagreb's suburb Sesvete, Nipro's division Nipro PharmaPackaging.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

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- 4.2 Market Drivers
 - 4.2.1 Growth of the Pharmaceutical Industry in Emerging Economies
 - 4.2.2 Commodity Value of Glass Increased with Recyclability
- 4.3 Market Restraints
 - 4.3.1 Increased Relevance of Alternate Sources
- 4.4 Value Chain Analysis
- 4.5 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.5.1 Bargaining Power of Suppliers
 - 4.5.2 Bargaining Power of Buyers
 - 4.5.3 Threat of New Entrants
 - 4.5.4 Threat of Substitutes
 - 4.5.5 Intensity of Competitive Rivalry
- 4.6 Assessment of the Impact of COVID-19 on the Market

5 MARKET SEGMENTATION

- 5.1 Application
 - 5.1.1 Vaccines
 - 5.1.2 Others (Insulin, Biopharma, Others)
- 5.2 Geography
 - 5.2.1 North America
 - 5.2.1.1 United States
 - 5.2.1.2 Canada
 - 5.2.2 Europe
 - 5.2.2.1 Germany
 - 5.2.2.2 United Kingdom
 - 5.2.2.3 France
 - 5.2.2.4 Italy
 - 5.2.2.5 Spain
 - 5.2.2.6 Rest of Europe
 - 5.2.3 Asia Pacific
 - 5.2.3.1 China
 - 5.2.3.2 Japan
 - 5.2.3.3 India
 - 5.2.3.4 South Korea
 - 5.2.3.5 Rest of Asia Pacific
 - 5.2.4 Rest of the World

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
 - 6.1.1 Schott AG
 - 6.1.2 Gerresheimer AG
 - 6.1.3 Stevanato Group
 - 6.1.4 NIPRO Corporation
 - 6.1.5 Piramida d.o.o.
 - 6.1.6 SGD SA
 - 6.1.7 AAPL Solutions Pvt. Ltd
 - 6.1.8 Crestani SRL

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- 6.1.9 Borosil Limited
- 6.1.10 Amposan SA
- 6.1.11 Accu-Glass LLC
- 6.1.12 Adit Containers Private Limited
- 6.1.13 Agrado SA
- 6.1.14 Birgimefar Group
- 6.1.15 J. Penner Corporation
- 6.1.16 Bormioli Pharma
- 6.1.17 Sisecam

7 INVESTMENT ANALYSIS

8 FUTURE OF THE MARKET

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