SCOTTS INTERNATIONAL

Pharmaceutical Cartridges - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2024 - 2029

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

The Pharmaceutical Cartridges Market is expected to grow at a significant CAGR of 7.5% during the forecast period.

The COVID-19 pandemic has disrupted the pharmaceutical cartridges market in the initial phase due to the disruptions in the production and distribution of pharmaceutical cartridges. However, the pandemic has also led to a surge in demand for a wide range of drugs, vaccines, and other essential pharmaceuticals which created a huge demand for pharmaceutical cartridges. For instance, a total of 11.4 billion doses of COVID-19 vaccines have been administered globally as of April 2022. Countries with vaccine manufacturing capabilities such as the United States, China, India, Germany, and the United Kingdom have administered more than 100 vaccine doses per 100 people. Also, around 16 billion vaccine doses worth USD 141 billion were supplied in 2021 which is nearly 3.5 times of 2019. Thus, the huge demand for vaccines positively impacted the pharmaceutical cartridges market.

The key factors driving the growth of the pharmaceutical cartridges market are the increase in research & development (R&D) spending in the pharmaceutical industry, technological advancements in drug delivery devices, and the growing prevalence of chronic diseases. For instance, in 2022, according to SHL Medical an innovative method known as Needle Isolation Technology (NIT) is developed to address the problems with cartridge-based injection devices. Based on a pre-installed needle hidden inside the device, the technology eliminates the need for users to manually attach the needle. With NIT, users merely remove the cap to insert the needle prior to injection, allowing the fluid route to be opened and the injector to automatically prime. Such advancements in products will contribute to the growth of the pharmaceutical cartridge market.

However, the development of new drugs creates demand for pharmaceutical cartridges products. For instance, according to a report by the International Federation of Pharmaceutical Manufacturers and Associations, globally, 64 novel active substances (NAS) have been launched in 2022, while more than 6,147 products are currently in active development from Phase 1 to regulatory submission. There are currently more than 9,000 drugs in development across all therapeutic areas, along with 260 vaccines. Such developments of novel drugs are likely to create demand for pharmaceutical cartridges over the forecast period.

However, the challenges associated with material such as damage or breakage during transportation may hinder the growth of the pharmaceutical cartridges market.

Pharmaceutical Cartridges Market Trends

Glass Material is Expected to have Significant Market Share during the Forecast Period

The glass material segment is expected to witness significant growth in the pharmaceutical cartridges market over the forecast period. This is largely due to increased demand for their superior quality and stronger chemical resistance than plastics. These cartridges have the lowest coefficient of expansion and a high level of thermal shock and stress tolerance. It is resistant to damage from many substances and has less leaching due to characteristics such as a high melting point. Glass cartridges are compatible with a wide range of pens and auto-injectors that are often utilized for administering drugs, including local dental anesthesia and insulin for people with diabetes.

Also, there are several advantages of glass material over plastic that includes the non-absorbent and non-leaching nature of glass cartridges which is crucial for preserving the purity and effectiveness of biological & sensitive drugs and providing product protection over a period. It is easy for healthcare professionals to check the dosage, inspect the content and check for any impurities through glass material. Also, glass is chemically inert, and it does not react with most pharmaceutical substances. This makes it secure and dependable material for preserving and storing a wide range of drugs without compromising efficacy and safety.

Furthermore, the COVID-19 pandemic has increased the demand for parenteral drugs, which has increased the pressure on biopharmaceutical companies to reduce their time to market. Thus, in June 2021, SGD Pharma announced that 20ml EasyLyo molded glass Type 1 vials were available to consumers in a ready-to-use manner. SGD Pharma was the first manufacturer of molded glass to deliver RTU vials for injectable drugs on an industrial scale. Also, due to the company's collaboration with the Stevanato Group, it has also been the first to market 20ml EasyLyo molded glass Type I vials in EZ-fill Nest & Tub.

North America is Expected to Dominate the Market Over the Forecast Period

North America is expected to dominate the pharmaceutical cartridges market over the forecast period. The key factors contributing to the market are highly developed healthcare infrastructure, and well-established authorities ensuring stringent regulatory monitoring of the pharmaceutical industry.

The increasing demand for drugs & precise drug delivery systems is a major factor contributing to the market growth in the region. The high demand for drugs has been influenced by the prevalence of chronic diseases, the rising aging population, and the adoption of new technologies and advancements in the pharmaceutical industry. For instance, according to the American Cancer Society report, cancer is the second most prevalent cause of mortality in the United States. Also, 1.95 million new cases of cancer, which is equal to 5,370 cases every day are likely to be diagnosed in the country in 2023. Hence, cancer is increasing the demand for pharmaceutical drugs which is further likely to drive the growth of the pharmaceutical cartridges market.

Furthermore, the rising R&D expenditure in the pharmaceutical industry in Canada and the United States by the top key players are also driving market growth in the region. For instance, in March 2023, in the United States, Bayer AG planned to invest USD 1.0 billion in the research & development of drugs. Also, there were around 25 pharmaceutical companies that invested heavily in R&D in 2022. The top investors include Roche, Merck & Co., Pfizer, Novartis, and AstraZeneca. Among these players, Roche invested USD 14.7 million in 2022, a significant increase of 27.1% from 2021. Pfizer, a global leader in pharmaceuticals, spent USD 11.4 billion on R&D in 2022. Thus, the increasing R&D expenses are driving the growth of pharmaceutical drugs which would also strengthen the demand for cartridges in the region.

Therefore, due to the factors mentioned above, the pharmaceutical cartridges market is expected to grow in the region over the forecast period.

Pharmaceutical Cartridges Industry Overview

The pharmaceutical cartridges market is moderately competitive. Some of the key players operating in the market include Schott AG, Nipro Corporation, Stevanato Group, West Pharmaceutical Services, Inc, Gerresheimer AG, and Merck KGaA. Companies are adopting various strategies such as product launches, expansion of the products and services into new regions, mergers & acquisitions, and entering new partnerships and collaborations to strengthen their position in the market.

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
4.2 Market Drivers
4.2.1 Rising Demand for Easy to Use and Convenient Pharmaceutical Packaging Solutions
4.2.2 Increase in R&D Spending in the Pharmaceutical Industry
4.3 Market Restraints
4.3.1 Manufacturing Complexity and Stringent Regulatory Compliance Related to Pharmaceutical Cartridges
4.4 Porter's Five Force Analysis
4.4.1 Threat of New Entrants
4.4.2 Bargaining Power of Buyers/Consumers
4.4.3 Bargaining Power of Suppliers
4.4.4 Threat of Substitute Products
4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD million)
5.1 By Material
5.1.1 Glass
5.1.1.1 Type 1
5.1.1.2 Type 2

5.1.1.3 Type 3
5.1.1.4 Type 4
5.1.2 Plastic
5.1.2.1 Polyethylene Terephthalate (PET)
5.1.2.2 High-Density Polyethylene (HDPE)
5.1.2.3 Other Plastic Material
5.1.3 Rubber
5.2 By Capacity
5.2.1 Less than 3ml
5.2.2 3ml-5ml
5.2.3 5ml-10ml
5.2.4 More than 10 ml
5.3 By Therapeutic Area
5.3.1 Ophthalmology
5.3.2 Respiratory
5.3.3 Neurology
5.3.4 Oncology
5.3.5 Immunology
5.3.6 Cardiology
5.3.7 Diabetes
5.3.8 Dental
5.3.9 Other Therapeutic Area
5.4 By End User
5.4.1 Pharmaceutical Companies
5.4.2 Biotechnology Companies
5.4.3 Other End Users
5.5 Geography
5.5.1 North America
5.5.1.1 United States
5.5.1.2 Canada
5.5.1.3 Mexico
5.5.2 Europe
5.5.2.1 Germany
5.5.2.2 United Kingdom
5.5.2.3 France
5.5.2.4 Italy
5.5.2.5 Spain
5.5.2.6 Rest of Europe
5.5.3 Asia-Pacific
5.5.3.1 China
5.5.3.2 Japan
5.5.3.3 India
5.5.3.4 Australia
5.5.3.5 South Korea
5.5.3.6 Rest of Asia-Pacific
5.5.4 Middle East and Africa
5.5.4.1 GCC

5.5.4.2 South Africa
5.5.4.3 Rest of Middle East and Africa
5.5.5 South America
5.5.5.1 Brazil
5.5.5.2 Argentina
5.5.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE
6.1 Company Profiles
6.1.1 Merck KGaA
6.1.2 Nipro Corporation
6.1.3 Schott AG
6.1.4 Stevanato Group
6.1.5 West Pharmaceutical Services, Inc.
6.1.6 Gerresheimer AG
6.1.7 Datwyler Holding Inc.
6.1.8 AptarGroup, Inc.
6.1.9 Transcoject GmbH
6.1.10 Shandong Province Medicinal Glass Co., Ltd.
6.1.11 Kalbag Filters Pvt.
6.1.12 Kel India Filters

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

SCOTTS INTERNATIONAL

Pharmaceutical Cartridges - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2024 - 2029

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-05
		Signature	