Pharmaceutical Glass Vials And Ampoules - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019-2029

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Report description:

The Pharmaceutical Glass Vials And Ampoules Market size is estimated at USD 14.82 billion in 2024, and is expected to reach USD 20.73 billion by 2029, growing at a CAGR of 6.94% during the forecast period (2024-2029).

Glass has long been the go-to material for safe packaging in the pharmaceutical packaging industry and is best suited to sustaining various chemical compositions. Also, glass vials and ampoules provide enhanced transparency, which allows easy inspection and monitoring of their contents.

Key Highlights
-The growing pharmaceutical industry aids the market's growth. The demand for pharmaceutical glass vials and ampoules arises in densely populated countries. The increasing pharmaceutical production in these countries is further increasing demand. In addition, growing healthcare spending in developing countries like India and China is another driver of the market's growth.
-Emerging markets are described as growing and prosperous nations owing to their favorable demographic conditions, low labor costs, and abundant resources. The BRICS nations (Brazil, Russia, India, China, and South Africa) are the top developing economies. There are a few different approaches to classifying lower-tier economies. MIST countries include Mexico, Indonesia, South Korea, and Turkey. Another interpretation separates the two groups into CIVETS (Colombia, Indonesia, Vietnam, Egypt, Turkey, and South Africa) and Bangladesh, Egypt, Indonesia, Iran, Korea, Mexico, Nigeria, Pakistan, the Philippines, Turkey, and Vietnam.
-The significant characteristic benefits of glass, such as chemical durability and suitability to sustain various chemical compositions, are some factors driving packaging vendors to choose glass as a pharmaceutical material. Additionally, glass vials and ampoules offer improved transparency, making viewing and monitoring the contents easier. This provides additional protection because glass is chemically resistant to most pharmaceuticals and comparatively impermeable to air and moisture.

-Traditionally, the preferred materials across pharmaceutical packaging have been aluminum and glass. Over time, these materials became expensive due to raw material prices and other factors and could not provide economically viable solutions for packaging products across mass consumption. That marked the advent of plastics as an option.
-The COVID-19 pandemic caused massive demand for vials and ampoules worldwide. The large-scale production of the Coronavirus vaccine in various countries worldwide has significantly affected the market scenario. As a result of the pandemic, R&D innovation has experienced a golden period of advancement, and the drug delivery and packaging markets have also experienced continuous growth and innovation. Whether vials, bottles, ampoules, auto-injectors, connected devices, or cold chain storage of lifesaving COVID-19 vaccines, the pharmaceutical packaging and delivery sectors have played a critical role in the pandemic in transforming the way of delivering medicines in general.
-Further, increasing company activities in developing effective vaccines and growing vaccine approvals are also contributing to the segment's growth. In August 2022, the US FDA approved the Moderna COVID-19 vaccine and the Pfizer-BioNTech COVID-19 vaccine as bivalent formulations of the vaccines for use as a single booster dose at least two months following primary or booster vaccination. Therefore, these continued developments in the vaccine industry post-COVID-19 have bolstered the demand for glass vials and ampoules.

Pharmaceutical Glass Vials and Ampoules Market Trends

Vaccines to Hold Significant Market Share

- The increasing demand for vaccines, coupled with the rising prevalence of chronic diseases, contributes to the overall growth of the pharmaceutical packaging industry. The market for glass vials and ampoules is expected to witness a substantial increase as a result.
- The surge in demand for vaccine packaging solutions is aided by the high number of vaccines acquired by consumers and the major vaccination drives organized by mainstream organizations like WHO and UNICEF. This has led to a significant increase in demand for glass ampoules and vials in end-use sectors such as hospitals, diagnostic centers, research programs, and other healthcare units.
- Furthermore, the global demand for vaccines has been steadily increasing due to various factors, including ongoing efforts to combat infectious diseases, emerging pandemics, and a growing awareness of the importance of vaccination.
- The flexibility and scalability of supply are greatly impacted by technology transfers and partnerships throughout the manufacturing process, particularly with the development of COVID-19 vaccines. Many manufacturers rely on receiving bulk vaccines from another manufacturer that they then fill into vials, ampoules, and packages for distribution.
- Stringent regulatory requirements for pharmaceutical packaging, especially for vaccines, often favor using glass due to its chemical inertness and the ability to withstand sterilization processes. This compliance drives the demand for glass vials and ampoules in pharmaceutical packaging. Ensuring an adequate supply of pharmaceutical glass vials for the distribution of the vaccine worldwide is crucial for the success of a global response. Governments and pharmaceutical companies worldwide are placing hundreds of millions of orders and urging primary packaging glass manufacturers to increase their production capacity.
- These initiatives proved successful in many countries, acquiring and administrating vaccines by their respective governments. For example, as of November 2023, the Indian government had administered more than 2.2 billion COVID-19 vaccinations. According to CNN and OWID, as of March 20, 2023, about 13 billion COVID-19 vaccine doses had been administered globally, with the United States accounting for almost 672 million.

Asia Pacific Expected to Witness Major Growth

- The Chinese pharmaceutical glass ampoules and vials market is expected to expand as China has established a standard framework for the pharmaceutical industry. The country is increasingly focusing on the stability of pharmaceutical packaging materials during drug storage and the safety of the packaging when used. Pharmaceutical companies increasingly use glass packaging because of its durability, non-reactivity, transparency, eco-friendliness, and versatility. Additionally, glass vials are in high demand due to increasing investment and R&D in healthcare systems and rising drug spending.
- Japan's pharmaceutical industry is one of the fastest growing in the world, second only to the United States. This is due to the country's continued focus on developing generic and patented drugs and vaccines and the government's deregulatory measures for international companies wishing to invest in the country. In May 2023, Nipro Corporation Japan, one of the world's largest companies, presented its investment of over PGK 100 million (USD 26.48 million) at the Sesvete plant, where it is constructing a new ampoules and vial factory (Pharmaceuticals) Nippro Pharma Packaging (Hrvatska) for the pharmaceutical industry. Nippro Corporation Japan purchased the old Piramida factory (Sesvete) from the Blue Sea Capital fund (which was recently named the year's most successful acquisition).
- The demand for glass packaging in India is expected to increase as the Indian pharmaceutical industry grows. Players in the industry are focusing on capitalizing on market growth, so they are opening glass tubing facilities to help the companies support drug manufacturers in addressing progressively complex capacity and quality challenges while fulfilling the need for essential medicines in the Indian market.
- For instance, in July 2023, a joint venture between United States technology company Corning and French pharmaceutical glassmaker SGD Pharma will build a pharmaceutical glass tubing facility in the Indian state of Telangana to scale up pharmaceutical manufacturing in India. The new facility will bring together Corning's proprietary glass coating technology platform, Velocity Vial, and SGD Pharma's vial converting expertise to enhance vial and fill-line productivity and the delivery speed for injectable treatments worldwide. The groundbreaking ceremony for the new facility was held in June 2023, and the company expects to invest approximately INR 5 billion (USD 60.3 million) in the facility, which is expected to create about 150 jobs. The manufacturing of Velocity Vials is expected to start at SGD Pharma's Vemula facility in 2024, with the production of pharmaceutical tubing expected to begin in 2025.
- The demand for injectables is increasing as they can bypass many issues plaguing orally administered nutrients. As healthcare needs increase, the demand for pharmaceuticals, vaccines, and other medical products packaged in vials and ampoules will also increase, creating pressure on the production of such medicines. This leads to pharmaceutical companies switching to contract manufacturers. For instance, in May 2023, Bridgewest Group, a company developing innovative software, life sciences, and deep tech companies, launched a new contract development and manufacturing organization (CDMO) focusing on sterile injectable drug products. The CMDO is located in Western Australia and will operate under NovaCina.

Pharmaceutical Glass Vials and Ampoules Industry Overview

The pharmaceutical glass vials and ampoules market is highly fragmented, with the presence of major players like Schott AG, Gerresheimer AG, Stevanato Group, Nipro Corporation, and Kapoor Glass India Pvt. Ltd. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

- October 2023 - Gerresheimer has launched vials containing COP (Cyclic Olefin Polymer), a suitable solution for filling and storing susceptible biological products. COP vials are ideal for using mRNA-active ingredients in cold and cryogenic environments. Gerresheimer is broadening its range of RTF glass vials, which are available in various qualities, with a high-quality polymer that combines the best properties of both glass and plastic.
- February 2023 - NOVA Ompi entered into a pre-sale agreement to purchase a brownfield site in Latin (Italy), close to other facilities of the Stevanato group, for an approximate price of EUR 16,0 million (USD 16.91 million). After renovation, the brownfield site is expected to produce EZ-filled syringes, vials, and other products.

Additional Benefits:

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

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