

## **Sterile Medical Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The Sterile Medical Packaging Market size is estimated at USD 63.77 billion in 2024, and is expected to reach USD 96.72 billion by 2029, growing at a CAGR of 8.69% during the forecast period (2024-2029).

#### Key Highlights

- The threats posed by epidemics and pandemics have become increasingly evident as ongoing universal challenges, and they are now recognized as a top priority for action on the global health agenda. Various organizations have put up strict regulations toward infection prevention and control (IPC), which is expected to drive the demand for sterile-based medical packaging, contamination-free medical products, and preventing disease transmission. Owing to such regulation, a player such as Jubilant HollisterStie is investing in expanding capacity. In May 2022, Jubilant HollisterStier invested USD 285 million to double its capacity to fill and finish sterile injectables at its Spokane, Washington facility. The investment is part of the company's cooperative agreement providing USD 149.6 million from the US Government to expand its critical vaccine manufacturing capacity in the US.
- Additionally, vendors are continuously expanding their operations to widen their product portfolio. For instance, Dordan Manufacturing Inc. (an ISO 9001:2015 certified company) initiated its cleanroom project to enhance its existing expertise in medical packaging. The company designs, manufactures and distributes custom thermoformed packaging for multiple industries.
- Sterile medical packaging is integral to healthcare and infectious disease control. Sterile medical packaging continues to innovate and invest in single-use options and biodegradable plastics without the risk of contamination. These packagings protect patients, medical staff, and clinicians from potential microbial infections. It also helps ensure that medical products are sterile and uncontaminated during transportation, storage, and use.
- In the past few years, many polymers, such as polycarbonates, polypropylene, and polyethylene, have been widely adopted as a material of choice by the medical packaging industry. However, high-performance advancements in plastic and engineering polymers have seen growing penetration in the industry, replacing conventional metals and existing commodity plastics primarily

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because of the advent of stringent and robust sanitizing agents. In September 2022, Scientists in the UK developed a plastic film that can kill SARS-CoV-2 virus particles attached to its surface with just room light. Developed by a team at Queen's University Belfast in the UK, the self-sterilizing film is cheap to manufacture and easy to scale. It is used in tablecloths, curtains in hospitals, and disposable aprons. The film is coated with a thin layer of particles that absorb ultraviolet (UV) light and generate reactive oxygen species - ROS and is expected to replace disposable plastic films used in the healthcare industry.

-However, In European countries, EU regulations require that various pharmaceutical manufacturers comply with EU Good Manufacturing Practices (GMP) when supplying products to the EU. In addition, manufacturers and importers must be licensed and registered by the competent authorities of Member States. Manufacturers and importers are regularly inspected by their EU authorities in the jurisdiction or other recognized authorities to confirm compliance with their GMPs in the EU. This process applies regardless of the manufacturer's location. If the product is imported from another company, the importer is responsible for GMP compliance.

-Furthermore, disruptions in the supply chain contributed to a downfall in manufacturing sterile packaging amid the global COVID-19 pandemic. In contrast, rising consumer concerns associated with viral exposure to various materials favour the industry's growth. Also, rapid production has become a key factor for medical packaging professionals during the pandemic. More medical companies are demanding faster and more sustainable packaging, and packaging companies are overdriving to meet that demand post-COVID-19.

## Sterile Medical Packaging Market Trends

### Vials and Ampoules is Expected to Hold a Significant Share

- Sterile medical packaging mainly includes vials and ampoules. They are widely used in the pharmaceutical business to fill and store a variety of medications and pharmaceuticals. Chemically unstable materials, drugs, and chemicals can all be stored in these items. These aid in preventing tampering with medicines and other things kept there. Every sample, including medications and drugs, can be kept longer in vials.

- The demand for vials and ampoules has grown due to the medications and vaccination demand related to the COVID-19 pandemic in the past few years. Manufacturers of pharmaceutical packaging have significantly boosted their production capacity. Millions of vials and ampoules are produced monthly by manufacturers operating at full capacity.

- Major companies operating in the industry are focused on expansions through investments and collaborations. For instance, in August 2022, German pharmaceutical packaging supplier Gerresheimer announced an investment of up to USD 94 million to strengthen its glass vial manufacturing, shipping, and distribution capabilities in the United States. The company will add a vial forming line to its North Carolina facility for the expansion project. These include dimensional control, annealing, visual inspection, and packaging lines.

- Glass is one of the materials that is frequently used to make vials and ampoules. The increasing healthcare expenditures, along with growing pharmaceutical sales and the expanding propensity of various end-users, including hospitals and pharmaceutical businesses, would propel the use of the items due to their chemical inertness and impermeability to drug stability, glass vials, and ampoules package liquid and lyophilized medications. Further, according to AstraZeneca, pharmaceutical sales in the United States are growing by ~8% year-on-year and have reached USD 605 billion in 2022 from USD 516 billion in 2020.

- Further, there is an increasing demand for vials and ampoules in nations with dense populations. The rising pharmaceutical manufacturing in these nations is further fueling the need. Depending on parameters, such as the ingredients and medication content, they must be packaged in a nonreactive container. Increased consumption of biopharmaceuticals, vaccines, and insulin, particularly in nations in the Asia-Pacific, Latin America, and Eastern Europe, is projected to encourage a rise in the usage of ampoules during the forecast period.

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North America is Expected to Witness a Significant Growth.

- The developed countries in the region, such as the United States and Canada, have prosperous economies, ageing populations, and advanced medical delivery systems. With its advanced primary care community, extensive medical and life sciences research activities, high healthcare spending intensity, and ample pharmaceutical and medical supplies and medical device industries, the United States is the world's largest market for sterile medical packaging products. It is one of our important geographical markets.
- High medical spending on medical technology drives the demand for the sterile medical packaging market in the United States. Technological advancements in medicine have enabled doctors to diagnose and treat diseases in previously difficult ways. Increased medical spending on medical technology may bring new medical devices and products to market. As the availability, number, and variety of devices and products increase, so does the demand for sterile medical packaging.
- International companies are expanding their business into the region. In March 2023, Granules India launched its packaging facility through its Granules Consumer Health (GCH) step-down subsidiary, which is located in Virginia, US. The facility is over 79,000 square feet and is equipped with packaging lines and clean rooms to package and ship prescription and over-the-counter products across the U.S. market. The facility received US FDA approval with zero 483 observations.
- The increasing demand for sterile medical packaging products from pharmaceutical industries would further drive the growth of the studied market during the projected timeframe. According to StatCan, in 2024, pharmaceutical and medicine manufacturing industry revenue is expected to account for USD 9.94 billion.
- Moreover, the increasing demand for injectable pharmaceuticals in Canada is driving the growth of glass bottles. The need for oncology and other high-potency drugs (such as steroids, IV fluids, and antibody conjugates that require quick onset of action) is anticipated to be the key growth driver. In addition, global players, such as Hikma Pharmaceuticals PLC, are focusing on launching sterile injectable medicines in the region. In March 2023, Hikma Pharmaceuticals PLC (Hikma), a multinational pharmaceutical company, announced the launch of four new sterile injectable drugs in Canada, providing new treatment options for patients and healthcare service providers alongside building on the company's growing presence in the Canadian market.

#### Sterile Medical Packaging Industry Overview

The Sterile Medical Packaging Market is highly competitive, owing to several small and large players operating in domestic and international markets. The players in the market are adopting major strategies, like product innovations, mergers and acquisitions, and strategic partnerships, to widen their product portfolio and expand their geographical reach. Some of the players in the market are Amcor PLC, Steripack Ltd, Wipak Group, and Placon Corporation, among others.

In May 2022, Cleanroom Film and Bags (CFB), a division of a US-based packaging company, opened a facility to manufacture sterile cleanroom packaging. The facility features ISO-certified cleanrooms and will use solar-powered energy.

In April 2022, Amcor expanded its healthcare packaging facility in Sligo, Ireland, to strengthen its position in the sterile packaging industry. As part of the project, Amcor will add Class VII cleanroom manufacturing environments and ISO 13485-certified advanced thermoforming operations that meet regulatory requirements.

#### Additional Benefits:

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

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