

Europe Pharmaceutical Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Pharmaceutical Packaging Market is expected to register a CAGR of 7.3% during the forecast period.

The Europe Pharmaceutical Packaging Market is estimated to grow at a CAGR of about 7.3% over the forecast period 2021 to 2026. The pharmaceutical industry in Europe is experiencing constant disruption as it experiences exponential growth with the changing lifestyle and more and more people being diagnosed with various diseases and increased spending on healthcare by the government bodies. However, it continues to face challenges such as globalization of drug supply, rise in chronic lifestyle, and evolving threat concerning counterfeit medicine, among others.

The pharmaceutical packaging industry in the region plays a vital role in helping the evolving pharma industry to address the impact associated with challenges being felt across the market, ensuring the protection of drugs against all sorts of alteration in the properties caused as a result of physical damage, degradation, biological contamination while driving boost in profits.

Over the period last few years, the packaging sector in the region has been experiencing a great deal of transformation with the industry-changing focus towards personalized approaches with development of platforms such as IoMT, genomics, and other connected medical devices, localized production of customized medicines added with the increase in the number of SMEs entering the market, increasing demand for cannabis-based medicinal products and diversification of the innovators.

Also, the introduction of innovative techniques like Blow-Fill-Seal technology and the increasing need for anti-counterfeiting technologies are changing the market drastically. The increasing globalization has resulted in the setting up of manufacturing plants all across the world, thereby improving the raw materials used and lengthening the supply chains.

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Additionally, with the recent European Union (EU) regulations mandating pharmaceutical serialization is added with the US Drug Supply Chain Security Act, compliance extended to 2023 is driving the serialization and track-and-trace efforts, thereby are promoting pharmaceutical traceability and authenticity in the region. Similarly, other EU regulation now requires dimensional codes on the medical packaging to help identify the product and verify their authenticity; leveraging smartphone technology drives the digitalization of the packaging industry.

According to a study conducted by the UN, the release of antibodies into the environment will accelerate the emergence of resistant strains and will impact antibiotic pollution, which continues to be the topic of global discussion in 2020. Owing to such instances, the manufacturers of pharmaceutical packaging are showcasing greater emphasis on sustainability by considering recyclable and biodegradable packaging materials, reduction in their carbon footprint, and lifecycle analyses.

However, Europe has been the second, just behind North America with more than a third of the global market, but with the emergence of China and other Asia-Pacific nations remains a threat, the increasing need for faster production and enhanced shelf appeal are driving the market ahead. Some concerns to this market are the stringent regulations to pharmaceutical packaging by the governments across Europe, environmental concerns regarding the use of plastics, and the rising costs of raw materials used.

Before the global pandemic COVID-19, the industry was driving growth concerning the growth of the e-commerce industry, increased interest in sustainable materials, and integration of smart technologies. Still, later the pandemic, there has been a surge in demand for healthcare packaging such as pumps, flexible blister foils, among others. Also, with the need for biologics and vaccines, the companies are now investing in the sterile format and are expanding their production capacity.

Europe Pharmaceutical Packaging Market Trends

Sustainable packaging materials to drive the market growth

- The pharmaceuticals industry is known to be a significant global polluter as it is responsible for generating the greenhouse gas emissions, i.e., 55% greater than that of the gas emitted by the automotive industry owing to the growing number of regulations and compliance such as the Paris agreement added with raising concern of people against the non-recyclable packaging materials is enabling the manufacturers to switch to sustainable materials.
- Also, Most of the R&D efforts by Europe's pharma packaging companies concerning drug dispensing systems are focused on factors such as sustainability, increasing compliance, and child safety considerations, among others.
- For instance, major players such as Ramaco Siebler, Huhtamaki announced their plans to launch a range of recyclable unit dose packaging for reliable pharmaceutical products to be made from recyclable material such as polyolefin laminate. The packaging component is expected to be made from 90% of either polypropylene or polyethylene, with more than 70% of the product would be recycled. Also, the companies have significantly reduced their emissions over the years.
- Furthermore, In February 2020, Natupharma A/S, based in Europe, developed a novel completely recyclable, biodegradable plastic packaging solution made of plastic additive and sugarcane, which is aimed to be used in the pharmaceutical industry owing to its biodegradability nature that does not alter the product' shelf life.
- Evidently, It is expected that pharma packaging will shift towards more sustainable materials by moving away from plastic, which the industry traditionally has been heavily dependent on for design and manufacturing. Also, the industry would continue the application of polyethylene terephthalate (PET) owing to its capability of breaking down its molecular level back into PET.

Germany to hold major market share

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- Germany is expected to hold a significant market share in the region owing to factors such as its significant contribution in the European pharmaceutical & packaging industry, the presence of a few prominent vendors in the region, including Gerresheimer AG and Schott AG, among others, and also being one of the largest producers of chemicals and plastics in the region.
- For instance, According to the research conducted by CPhI Worldwide, Germany ranks as Europe's preeminent pharma industry as per the data drawn from CPhI Annual report and opinions from over 350 global pharma companies. Also, the results consolidate Germany as an elite pharmaceutical market.
- Owing to such instances, the Prominent vendors in the region have started to invest in the region to maintain their strategic position in the market. For instance, In February 2020, Schott AG announced its plan for expansion by building a new production plant at its existing site in Mullheim, Germany, to meet the increasing demand for pre-fillable sterile polymer syringes are used in intravenous therapies and highly viscous medications. The construction is expected to be completed by the end of 2021.
- The plant will help the company leverage the rising demand for pharmaceutical packaging made out of high-end polymer and is expected to enhance Schott AG's position in the pharmaceutical market in the near future. Also, In April 2020, the company further announced its plan to expand its pharmaceutical packaging business by investing USD 1 billion until the year 2025.
- Moreover, the pharmaceutical and medical device industries are highly regulated and have been emphasizing the safety and sustainability aspects of manufacturing and packaging processes. The development of better and more advanced healthcare infrastructure, coupled with the growth of pharmaceutical companies through alliances and partnerships, is set to boost the growth of the packaging market.

Europe Pharmaceutical Packaging Industry Overview

The European Pharmaceutical Packaging Market is moderately fragmented due to the presence of players like Amcor, CCL Industries, Intrapac, Rexam Plc, and Schott AG upscaling the market with substantial R&D investments, driving towards the sustainability and digitization of the packaging industry in Europe.

- February 2020 - Amcor announced the partnership with the Healthcare Plastics Recycling Council to improve the recyclability of plastic products.
- June 2020- Amcor and Espoma Organic partnered together and innovated sustainable plastic packaging and even launched a new bio-based polymer packaging. The PE (Polyethylene) film contains 25% bio-based material that is derived from sugarcane.
- November 2021 - Gerreshmeir and Midas Pharma announced a partnership for an innovative autoinjector is an important milestone to be a solution provider offering leading and innovative medical devices. With an increasing focus on its own-IP products, the company enhances the broad portfolio of devices and primary pharmaceutical packaging with this cartridge-based autoinjector.

Additional Benefits:

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

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