

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

Market Report | 2025-04-28 | 133 pages | Mordor Intelligence

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Report description:

The Europe Pharmaceutical Plastic Packaging Market size is estimated at USD 14.40 billion in 2025, and is expected to reach USD 18.52 billion by 2030, at a CAGR of 5.17% during the forecast period (2025-2030).

Advantages associated with plastic packaging materials and products, such as their lightweight, low cost, flexibility, mechanical strength, and stability, make them suitable for use in the European pharmaceutical packaging market.

Key Highlights

- The growing adoption of blister packs in pharmaceutical packaging, which provides convenient methods to store and transport solid medicinal products, such as tablets and capsules, is fueling the demand for plastic packaging.
- Due to the low fragile nature and light weight of plastic bottles, European pharmaceutical companies increasingly prefer plastic bottles for cough syrups and other liquid drug packaging for better profit margins, supporting the growth of plastic packaging in the studied market.
- Rigid plastic bottles and vials offer better barrier properties, protecting medication from moisture and contamination. They are lightweight, easy to handle, and come in various sizes, supporting the growth adoption of plastic packaging in the pharmaceutical industry. Flexible plastic pouches and blister packs are convenient for unit-dose dispensing and on-the-go medication use.
- The development of better and advanced healthcare infrastructure in Europe is driving the pharmaceutical plastic packaging market, considering logistical aspects like cold chain requirements for vaccines since advanced healthcare facilities usually have robust cold chain infrastructure for storing and transporting temperature-sensitive medications like vaccines.
- The Red Sea crisis emerged from the Israel and Hamas conflict. It generated missile attacks against merchant and naval vessels in the Red Sea, which disrupted the supply chain route of resins and plastic raw materials to Europe from Middle Eastern countries, raising the price of raw materials in the ecosystem thereby hindering the market's growth.

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- In April 2024, Flexible Packaging Europe, the industry association for all types of flexible packaging manufacturers, reported that supply chain disruptions due to the shipping disruptions in the Red Sea had a significant impact on supply chains, leading to increased prices of European flexible packaging materials, including plastic packaging material, in the first quarter of 2024. This negatively impacted the growth of the European market.

Europe Pharmaceutical Plastic Packaging Market Trends

Syringes Segment is Expected to Hold Significant Market Share

- The rise in population in Europe is accompanied by a surge in aging demographics and chronic diseases, fueling the demand for syringes and injectables. Concurrently, key players are driving medical technology advancements and innovations bolstered by evolving regulations on medical needle usage.
- Syringes have become the go-to tools for parenteral medication administration. Specifically, pre-fillable syringes, designed for extracting and administering drug substances from vials, are gaining prominence. These syringes, predominantly used for chronic conditions like cancer and diabetes, offer precise drug delivery and minimize needle exposure, enhancing patient safety.
- Given the uptick in chronic diseases, the rising preference for injectable medications, and ongoing technological strides in the syringe sector, the pre-fillable syringes market is poised for growth in the coming years. The IDF Diabetes Atlas 10th edition projects a significant rise in diabetes cases in Europe, with estimates reaching 67 million by 2030 and 69 million by 2045.
- Plastic syringes are increasingly prevalent in medical disposables, supplanting traditional materials such as metals and glass. A notable instance in this trend is the adoption of disposable syringes made from polypropylene resin through injection molding. These syringes include a plunger, a graduated main body for capacity indication, a gasket, a needle holder, and a protective sheath cover. Disposable syringes find widespread use in modern medicine, primarily for drug and vaccine injections and blood extractions. They are favored over reusable syringes to mitigate disease transmission risks. Typical applications include insulin injections for diabetics and local anesthesia administration by dentists.
- The accelerated pace of clinical trials translates to a higher volume of samples collected for analysis, requiring efficient collection, storage, and transportation of these samples. The growing trend of decentralized and virtual trials, where samples are collected at remote locations, creates demand for temperature-controlled plastic packaging. According to the Alliance for Regenerative Medicine, 329 active clinical trials for regenerative medicine were done in Europe in 2023.
- Considering the demand, in April 2024, at Medtec Europe in Stuttgart this June, Arburg, a German manufacturer of injection molding machines, unveiled its stainless steel electric Allrounder. This machine is designed to produce syringe barrels using cyclic olefin polymer (COP) as a glass alternative. The showcased Allrounder 370 A, crafted from stainless steel to meet GMP standards, is tailored for cleanroom operations. Boasting a clamping force of 600 kN and an injection unit size of 70, it features a Lonstatex clean air module above the clamping unit, ensuring pristine production conditions.

Germany Expected to Witness Significant Growth

- Germany's pharmaceutical industry is experiencing considerable growth, driven by demographic shifts and a heightened focus on prevention and self-medication. These factors highlight the market's substantial growth potential. Germany is a global destination for clinical trials, with numerous ongoing studies contributing to medical advancements. Supported by significant R&D investments and many patent applications, the country leads Europe in pharmaceutical innovation. According to Germany Trade and Invest, Germany is the world's second-largest exporter of medicinal products, with a robust manufacturing sector that ranks among the top pharmaceutical producers globally.
- Government initiatives in Germany are set to play a pivotal role in propelling the pharmaceutical plastic packaging market.

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Notably, in 2023, the German government unveiled a new pharmaceutical strategy outlined in Strategy Paper 4.0. This strategy, designed to fortify the nation's pharmaceutical sector, focuses on bolstering research and production capabilities and aims to streamline market access and pricing mechanisms. The strategy includes significant investments in R&D, incentives for pharmaceutical companies to innovate, and measures to enhance the efficiency of regulatory processes. These reforms are expected to attract substantial foreign investment, stimulate domestic production, and ensure that Germany remains at the forefront of pharmaceutical advancements.

- Leading pharmaceutical companies are increasing investments in expansion activities in Germany. This investment surge is directly enhancing the production of plastic packaging in the pharmaceutical sector, serving as a key growth driver for the market.
- For instance, in February 2024, the Ontario Teachers' Pension Plan Board, a global institutional investor, and Nordic Capital, known for its focus on healthcare investments, unveiled a strategic collaboration with Advanz Pharma. A key player in the European pharmaceutical landscape, Advanz Pharma is set to benefit from this partnership, which is designed to bolster its growth and development initiatives. With a footprint spanning 90+ nations, Advanz specializes in pharmaceuticals catering to specialty, hospital, and rare diseases.
- In September 2024, Sanner, a German healthcare packaging company, will inaugurate a highly automated packaging production facility in Bensheim. Patents the European Patent Office granted to German applicants in the pharmaceutical sector are crucial in driving innovation and growth within Germany's pharmaceutical plastic packaging market, highlighting the sector's need for continuous adaptation.
- In 2023, the European Patent Office granted 172 patents in the pharmaceutical sector to German applicants. Germany, known for its strong industrial base and rigorous quality standards, is pivotal in the European pharmaceutical plastic packaging market. The country's emphasis on precision and reliability in manufacturing ensures high-quality packaging solutions. Germany's commitment to sustainability and advanced technologies, such as smart packaging, is expected to fuel market growth, making it a leader in this sector.

Europe Pharmaceutical Plastic Packaging Industry Overview

The European pharmaceutical plastic packaging market is highly fragmented, with major players like Gerresheimer AG, Amcor PLC, Berry Global Group Inc., Aptar Group Inc., and Origin Pharma Packaging. Key players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

- In April 2024, Berry Global Group Inc. invested in additional assets and manufacturing capabilities to increase its healthcare production capacity by up to 30% across three European sites. With this investment, Berry planned to deliver packaging and drug delivery devices that enhance the patient experience through improved medicine administration and adherence.
- In June 2024, Aptar Digital Health collaborated with SHL Medical, a provider of advanced drug delivery systems such as autoinjectors, pen injectors, and innovative specialty delivery systems. By integrating Aptar Digital Health's SaMD platform, SHL Medical is expanding its connected device technologies. This collaboration aims to offer holistic solutions, aiding patients in managing their diseases, especially those on injectable therapies.

Additional Benefits:

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

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