SCOTTS INTERNATIONAL

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

Market Report | 2025-07-01 | 121 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:

Ampoules Packaging Market Analysis

The ampoules packaging market reached USD 5.38 billion in 2025 and is projected to climb to USD 7.79 billion by 2030, translating to a 7.68% CAGR over the forecast period. Expansion is anchored in the pharmaceutical sector's pivot toward single-dose injectable formats, propelled by biologics growth and global regulations that prioritize tamper-evident, serialised containers. Glass ampoules currently dominate because they combine chemical inertness with established regulatory acceptance, yet plastic formats are scaling quickly as blow-fill-seal (BFS) platforms prove their sterility and cost benefits. Asia-Pacific leads demand after China and South Korea approved new botulinum toxin indications in 2024, while AI-enabled visual inspection lines accelerate quality-assurance gains for high-volume producers. Competitive intensity remains moderate: leading suppliers differentiate on break-system design, traceability features and sustainability programs instead of unit price, cushioning margins even as energy-related costs fluctuate.

Global Ampoules Packaging Market Trends and Insights

Demand for Tamper-Evident Pharmaceutical Packs

Drug manufacturers are investing heavily in visible tamper-evidence to satisfy FDA 21 CFR 211.132 and EU Falsified Medicines Directive requirements, steering ampoule specifications toward break-ring and score-line technologies that produce unmistakable indicators of interference. SCHOTT Pharma's One-Point-Cut system captured 62% of the global break-system sub-market by 2024, demonstrating how patient-safety features have moved from premium to standard expectation. Tamper-evidence also lowers liability risk for high-value biologics because compromised integrity directly threatens therapeutic efficacy. Hospitals increasingly cite simplified authenticity checks as a procurement criterion, encouraging suppliers to prioritise robust break designs. The resulting shift tightens qualification windows for alternative materials, reinforcing glass dominance in critical-care formulations.

Recyclability and Circular Value of Type-I Glass

Sustainability mandates push stakeholders to prefer containers that can re-enter production loops without downgrading quality. Type-I borosilicate satisfies this need: a 2024 closed-loop pilot by SCHOTT Pharma, Corplex and Takeda trimmed greenhouse-gas emissions by 50% versus virgin glass while meeting USP <660> chemical resistance benchmarks. European regulators now tie procurement incentives to recyclability scores, encouraging local health systems to favour glass derived from cullet streams. SGS audits confirm recycled Type-I maintains identical hydrolytic stability, so pharmaceutical?quality thresholds remain intact. As brand owners target Scope 3 decarbonisation, ampoule producers that guarantee traceable recycled content secure supply-agreement advantages. These developments extend to Asia-Pacific as multinationals transplant EU ESG criteria into regional tender processes.

Prefilled Syringes Cannibalising Volumes

Retail-oriented biologics and self-administered therapies are migrating to ready-to-inject syringes that offer dosing accuracy and patient convenience. Stevanato Group's 15% surge in syringe revenue in 2024 coincided with a 34% slump in vial sales, exemplifying format substitution pressure. Syringes carry superior margins, prompting producers to reallocate furnace hours away from ampoules. The shift is accelerated by blockbuster GLP-1 agonists, where self-injection adherence drives payer preference. Nevertheless, ampoules remain vital for drugs sensitive to silicone oil or tungsten residue associated with syringe stoppers. The segmented demand profile obliges ampoule suppliers to target niche, stability-critical molecules and invest in marketing that highlights glass purity advantages.

Other drivers and restraints analyzed in the detailed report include:

Regulatory Push on Injectable Traceability / Biologics CDMO Shift Toward Single-Dose Ampoules / Tubing Supply Volatility from Low-Carbon Furnaces /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Glass maintained an 87% share of the ampoules packaging market in 2024, reflecting entrenched regulatory confidence and unmatched chemical durability. Plastic formats, however, are logging a 9.78% CAGR through 2030, powered by BFS lines that cut sterility validation steps and shrink labor outlays. Within glass, Type-I borosilicate remains the default for biologics, oncology drugs and highly reactive compounds. Corning's Valor composition eliminates delamination while retaining hydrolytic class I properties, widening glass's applicability to high-stress cold-chain environments.

Manufacturers adopt divergent business models: SCHOTT Pharma derived 55% of 2024 revenue from high-value glass offerings that command premium pricing, whereas polymer specialists chase volume in vaccines and generics. Supply-chain simplicity strengthens plastic economics because containers form, fill and seal in one pass, reducing secondary packaging needs. Still, the ampoules packaging market size for glass?based solutions stood at USD 4.69 billion in 2025, dwarfing plastic's USD 690 million contribution. The trajectory indicates coexistence rather than displacement, hinging on therapeutic risk tolerance, required shelf-life and sustainability calculus.

Straight-stem ampoules led with 63% of ampoules packaging market share in 2024, but user-friendly formats such as One-Point-Cut (OPC), score-ring and color-breakring designs are rising at 9.21% CAGR. Healthcare providers increasingly rank reduced needlestick injuries and breakage complaints as procurement criteria, making easy-open options indispensable for nursing and at-home care settings. In parallel, funnel-type ampoules retain relevance for viscous or suspension formulations where wider necks enable efficient filling.

Easy-open uptake is also fueled by self-administration trends in vaccines and aesthetics. SCHOTT Pharma's easyOPC design cuts opening force variability by 60%, thereby decreasing spillage risk during dose preparation. As break-system patents expire, mid-tier producers can emulate these features, intensifying price competition in lower-margin therapeutic classes. Nonetheless, premium biologics continue to favor proprietary break technologies that guarantee sterility and traceability, reinforcing margin resilience for innovation leaders. The ampoules packaging market size for easy-open variants is projected to surpass USD 2.1 billion by 2030, supported by differentiating ergonomic value.

The Ampoules Packaging Market Report is Segmented by Material Type (Glass, and Plastic), Ampoule Type (Straight-Stem, Funnel-Type, Closed Form D, and More), Capacity (?2 ML, 3-5 ML, and Above 10 ML), End-User Industry (Pharmaceutical, and Personal Care and Cosmetics), Manufacturing Technology (Conventional Tubular Forming, Blow-Fill-Seal Plastic, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific controlled 39% of global revenue in 2024, buoyed by capacity expansions across China, India and South Korea as governments localise injectable drug supply chains. China's biopharmaceutical output hit CNY 565.3 billion (USD 78.4 billion) in 2024 and could eclipse CNY 1.4 trillion (USD 194 billion) by 2029, sustaining demand for ampoules despite sporadic API export restrictions tied to the 2024 Anti-Espionage Law. South Korea's aesthetics cluster in Gangnam fuels consistent small-volume glass orders, while India's "Make in India" incentives support BFS capacity additions for vaccines. Concurrently, ASEAN members court CDMOs by offering tax holidays and streamlined GMP approvals, amplifying regional competitiveness.

North America's growth is steadier, underpinned by biologics commercialisation pipelines and DSCSA compliance deadlines that require serialised primary containers. The United States drives high-value orders for Type-I glass and AI-enabled inspection lines that satisfy USP <1790> recommendations for parenteral visual inspection. Canada works to align with US traceability norms, spurring suppliers to provide bilingual packaging and GS1-compatible codes. Notably, herbicide litigation and supply-chain shocks have encouraged drug makers to dual-source ampoules from Mexico, broadening North American intra-regional trade.

Europe remains a value-rich but mature territory where sustainability and circular-economy targets dictate purchasing. The revised EU Packaging and Packaging Waste Regulation obliges recyclability scores above 70% by 2030, elevating demand for closed-loop Type-I glass streams. German hospitals formed a buying consortium in 2024 that gives 5-year contracts to vendors meeting ?50% cullet content, signalling future procurement norms. Meanwhile, energy-price volatility tied to gas supply cuts heightened concern over furnace downtime, prompting some firms to stockpile borosilicate tubing. Yet EU Recovery Funds earmarked for life-science infrastructure will subsidise next-generation inspection gear, partially offsetting cost fears.

The Middle East recorded the highest regional CAGR at 9.03% through 2030 as Saudi Arabia and the UAE channel public-health budgets into local manufacturing. Riyadh's Vision 2030 pharmaceutical programme co-funds sterile injectables plants, creating greenfield demand for BFS and tubular lines. Gulf Cooperation Council tender rules prioritize cost-effectiveness, positioning Indian and European mid-tier firms to capture share. However, limited skilled labour necessitates technology-transfer partnerships that intertwine equipment supply with long-term service contracts.

Latin America's uptake is hindered by macroeconomic instability, yet Brazil's ANVISA pushes serialization that mirrors EU-FMD requirements, opening opportunities for traceability-enabled ampoules. Africa remains nascent outside Egypt's vaccine complex; nonetheless, the African Union's 2040 target for 60% local vaccine manufacturing may catalyse BFS investments later in the forecast horizon.

List of Companies Covered in this Report:

Schott Pharma AG and Co. KGaA / Gerresheimer AG / Stevanato Group S.p.A. / SGD Pharma / Nipro PharmaPackaging International NV / Shandong Pharmaceutical Glass Co., Ltd. / James Alexander Corporation / Global Pharmatech Pvt. Ltd. / Essco Glass Pvt. Ltd. / AAPL Solutions Pvt. Ltd. / Hindusthan National Glass and Industries Ltd. / Ardagh Group S.A. / PGP Glass Pvt. Ltd. (Piramal) / Amcor plc (Rigid Plastics) / Unicep Packaging LLC / Catalent Pharma Solutions, Inc. / Recipharm AB (BFS) / Weiler Engineering, Inc. / Owens-Illinois, Inc. (O-I) / Vetropack Holding AG /

Additional Benefits:

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

Table of Contents:

5.6.4.2 Argentina
5.6.4.3 Rest of South America
5.6.5 Middle East
5.6.5.1 Saudi Arabia
5.6.5.2 United Arab Emirates
5.6.5.3 Rest of Middle East
5.6.6 Africa
5.6.6.1 South Africa
5.6.6.2 Nigeria
5.6.6.3 Rest of Africa

6 COMPETITIVE LANDSCAPE
6.1 Market Concentration
6.2 Strategic Moves
6.3 Market Share Analysis
6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)
6.4.1 Schott Pharma AG and Co. KGaA
6.4.2 Gerresheimer AG
6.4.3 Stevanato Group S.p.A.
6.4.4 SGD Pharma
6.4.5 Nipro PharmaPackaging International NV
6.4.6 Shandong Pharmaceutical Glass Co., Ltd.
6.4.7 James Alexander Corporation
6.4.8 Global Pharmatech Pvt. Ltd.
6.4.9 Essco Glass Pvt. Ltd.
6.4.10 AAPL Solutions Pvt. Ltd.
6.4.11 Hindusthan National Glass and Industries Ltd.
6.4.12 Ardagh Group S.A.
6.4.13 PGP Glass Pvt. Ltd. (Piramal)
6.4.14 Amcor plc (Rigid Plastics)
6.4.15 Unicep Packaging LLC
6.4.16 Catalent Pharma Solutions, Inc.
6.4.17 Recipharm AB (BFS)
6.4.18 Weiler Engineering, Inc.
6.4.19 Owens-Illinois, Inc. (O-I)
6.4.20 Vetropack Holding AG

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK
7.1 White-space and Unmet-Need Assessment

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

Market Report | 2025-07-01 | 121 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	2026-02-27
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com