

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

Market Report | 2025-07-01 | 102 pages | Mordor Intelligence

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Report description:

Healthcare Packaging Market Analysis

The healthcare packaging market size reached USD 161.57 billion in 2025 and is projected to grow to USD 219.23 billion by 2030, registering a 6.29% CAGR. Accelerated demand for biologics, rapid expansion of home-care treatment models, and tightening serialization rules anchor this upward trajectory. Demographic momentum is evident as the over-65 cohort now outnumbers youth in Europe, intensifying needs for user-friendly, senior-safe packs. In parallel, pharmaceutical brand owners prioritize traceable, tamper-evident designs to curb counterfeits, while smart sensors embedded in primary packs enhance therapy adherence. Sustainability regulations in the European Union and select U.S. states are pushing brand owners toward recyclable mono-material structures without compromising barrier protection. Volatile polymer feedstock pricing and constrained medical-grade glass capacity remain cost headwinds, but ongoing investment in regional production hubs is cushioning supply risk.

Global Healthcare Packaging Market Trends and Insights

Demand Surge in Self-Care and Home-Diagnostic Devices

Annual med-tech capital spending on diabetes care devices hit USD 7.09 billion in 2024, with USD 2.7 billion earmarked for continuous glucose monitors that require retail-ready sterile packaging. BD's PIVO Pro and MiniDraw launches show how brands now spec tamper-proof pouches sized for mail-order fulfillment while ensuring hospital-grade sterility. Medtronic's FDA-cleared InPen-Simplera Smart MDI system underscores that packaging must protect not only the drug but also the embedded electronics

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and companion apps. The healthcare packaging market, therefore, pivots toward child-resistant yet senior-friendly closures, multi-layer cavities for sensors, and QR-enabled instructions that match telehealth workflows. Intensified home-care adoption keeps the healthcare packaging market on a robust growth arc.

Serialization and Anti-Counterfeit Mandates

Full enforcement of the U.S. DSCSA in November 2024 triggered up to 30% error rates in data exchanges, risking daily quarantines of 110,000 packs when codes mis-match. Cardinal Health's turnkey serialization service pipeline grew as drug makers outsourced coding, aggregation, and validation steps. BD's iDFill RFID syringe shows that embedding identifiers at the primary level lets companies dispense with secondary labels and accelerate line speeds. European FMD rules requiring dual human- and machine-readable codes further push the healthcare packaging market toward digital infrastructure investment. Suppliers able to bundle hardware, software, and validated cloud services gain share as serialization complexity mounts.

Petro-based Resin Price Volatility

The shutdown of LyondellBasell's Houston refinery and the commissioning of Formosa's new polypropylene plant tightened propylene supply, with Argus expecting double-digit price hikes in 2025. Engineering-resin costs climbed again in March 2025, eroding converter margins. Healthcare brands tied to FDA-validated material codes cannot switch resins quickly, so smaller converters face liquidity crunches. The healthcare packaging market sees larger players using long-term hedging and multi-sourcing to blunt volatility, while they evaluate higher-barrier mono-PP laminates that permit down-gauging without risking barrier failure.

Other drivers and restraints analyzed in the detailed report include:

Aging Population and Chronic-Disease Prevalence / Sustainability-Driven Material Substitution / Complex Multi-Jurisdictional Waste-Disposal Rules /

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

Segment Analysis

Plastics continued to account for 70.12% of healthcare packaging market share in 2024, reflecting unmatched cost efficiency and flexible processing windows. Conversely, glass is advancing at a 10.42% CAGR, buoyed by biologics that require zero-ion-leach containers. SCHOTT Pharma's USD 371 million North Carolina plant will add 401 jobs and expand borosilicate syringe capacity for GLP-1 injectables, evidencing long-term confidence in premium vials. The healthcare packaging market size for high-value glass formats-vials, cartridges, syringes-will expand as mRNA, gene-editing, and cell therapies exit the clinic.

Advanced plastics retain dominance in inhalers, flexible IV bags, and ophthalmic droppers, but PFAS restrictions on certain fluoropolymer coatings force resin formulators to develop new barrier chemistries. Hybrid solutions, such as TekniPlex's clear recyclable blister laminate, combine PET with EVOH to reach moisture-vapour-transmission targets traditionally reserved for foil. Paperboard is making headway in secondary wraps thanks to EU recyclability mandates, yet its penetration into primary drug contact layers remains limited. Metals continue to serve pressurized drug delivery aerosols, but propellant phase-out in European markets is opening white-space for algae-based biomaterials now in early testing. Collectively, raw-material diversification positions the healthcare packaging market for a nuanced landscape where therapeutic class determines container of choice.

Bottles and containers retained a 40.21% slice of the healthcare packaging market in 2024, but blister packs are sprinting ahead with an 8.67% CAGR. Amcor's recycle-ready AmSky system substitutes PVC with HDPE, reducing greenhouse-gas emissions by

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70% yet keeping the barrier specs demanded for moisture-sensitive antihypertensive tablets. Compliance blister cards featuring NFC tags now capture ingestion events, feeding adherence dashboards for clinicians. Vials and ampoules remain compulsory for lyophilized APIs, although Stevanato's EZ-fill platform allowed Nipro to commercialize D2F ready-to-fill glass vials that cut change-over time by 80%.

Cartridges paired with wearable injectors are pivoting toward 8-mm thin-wall cannulas to handle high-viscosity biologics. Pouches have become the go-to for direct-to-consumer diagnostics kits, enabling low-profile letter-box shipping formats. The "other" category is swelling as smart packs embed desiccant pouches with RFID sensors that alert pharmacists when humidity excursions occur. Ultimately, the healthcare packaging market embraces a form-factor hierarchy where each format's role is dictated by molecule sensitivity, dosage regimen, and emerging e-commerce fulfillment norms.

The Healthcare Packaging Market Report is Segmented by Material (Glass, Plastics, and More), Product Type (Bottles and Containers, Vials and Ampoules, Cartridges and Pre-Filled Syringes, and More), Packaging Level (Primary, Secondary, Tertiary), End-User (Pharmaceutical Manufacturing, Medical-Device OEMs, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America controlled 36.35% of healthcare packaging market share in 2024, supported by FDA serialization rules that compel high-margin coding equipment. Supply-chain turbulence persists; 80% of providers expect shortages to intensify, adding up to USD 3.5 million in annual costs for medium-sized systems. BD's USD 2.5 billion domestic capacity build underscores a reshoring logic that protects the healthcare packaging market from trade disruptions. However, tariffs on medical devices now reaching 25% incentivize converters to dual-source tooling from Mexico and Canada.

Asia-Pacific is the fastest-growing region, charting a 9.32% CAGR on the back of generics expansion and public-health funding in India, China, and ASEAN. Amcor's acquisition of Phoenix Flexibles doubled its cleanroom lamination capacity in India, demonstrating commitment to localize supply. Japan's Health 2025 expo spotlighted regenerative-medicine packaging that demands cryo-validated vials. TOPPAN and DNP showcased fiber-based sterile packs, signaling a regional tilt toward circular materials.

Europe maintains strong throughput despite regulatory churn. The upcoming recyclability mandate challenges legacy multilayer foils, yet drives R&D funding for bio-based barrier layers. Germany captures disproportionate share of glass syringe output, but capacity constraints spur investments in Spain and the Czech Republic. Middle East & Africa continue to expand basic generic drug plants in Saudi Arabia and Egypt, opening greenfield demand for GMP-grade films. South America posts mid-single-digit growth; Brazil's ANVISA introduced e-leaflets that lower carton size, trimming logistics costs. Collectively these dynamics widen the healthcare packaging market size across every continent while diversifying the risk portfolio for multinational converters.

List of Companies Covered in this Report:

Amcor plc / Gerresheimer AG / SCHOTT AG / Corning Incorporated / West Pharmaceutical Services / AptarGroup Inc. / Becton Dickinson & Co. / SGD Pharma / Nipro Corporation / Piramal Glass / Oliver Healthcare Packaging / Smurfit WestRock / Sealed Air Corp. / Sonoco Products Co. / Catalent Inc. / Beatson Clark PLC / Shandong Medicinal Glass / Sisecam Group / Arab Pharmaceutical Glass Co. / Stolze-Oberglas GmbH /

Additional Benefits:

 The market estimate (ME) sheet in Excel format /

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