SCOTTS INTERNATIONAL

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

Market Report | 2025-07-01 | 159 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:

Pharmaceutical Glass Packaging Market Analysis

The pharmaceutical glass packaging market size reached USD 31.31 billion in 2025 and is forecast to climb to USD 39.89 billion by 2030, expanding at a 4.97% CAGR. This outlook reflects a steady pivot toward high-value container systems that can meet rigorous sterility and leachables limits while supporting rapid biologics scale-up, decentralized vaccine production and growing self-injection preferences. Tightened guidelines from the FDA and the European Medicines Agency continue to elevate demand for Type I borosilicate formats, while AI-enabled inspection unlocks higher throughput with lower defect risk. At the same time, furnace modernization and greater recycled content help producers manage sustainability mandates without compromising regulatory compliance. As a result, the pharmaceutical glass packaging market continues to offer reliable growth opportunities, tempered only by raw-material cost swings and rising competition from advanced polymers.

Global Pharmaceutical Glass Packaging Market Trends and Insights

Expansion of Biologics and Injectable Drugs Pipeline

Regulatory data show 17 biologics approvals among 55 new FDA drugs in 2024, underscoring sustained biologics momentum. Manufacturers therefore accelerate Type I capacity upgrades that ensure protein stability and mitigate delamination risk. A revenue jump to EUR 1,104 million at Stevanato Group, with 38% from high-value solutions, highlights how premium containers capture this wave. Oncology and autoimmune therapies increasingly favor large-volume cartridges that enable subcutaneous dosing, reinforcing the critical role of the pharmaceutical glass packaging market in supporting patient-centric delivery. Continued gene-therapy breakthroughs will deepen reliance on containers that maintain sterility across frozen supply chains. Together these trends give biologics a structural tailwind that raises baseline demand well beyond 2030.

Mounting Vaccine Fill-Finish Capacity Post-COVID

Global vial consumption remains elevated as governments keep strategic vaccine reserves. SCHOTT produced enough vials for more than 1 billion COVID-19 doses, illustrating the sustained baseline. EMA coordination to ease GLP-1 agonist shortages further spotlights the drive for resilient supply chains. North American demand strengthened when Bormioli Pharma lifted regional sales 47% after adding FDA-approved storage capacity. Facility expansions across India and Southeast Asia also push incremental volume to local converters, reinforcing the pharmaceutical glass packaging market across emerging hubs. These investments support broad immunization goals while smoothing order volatility seen during the initial pandemic surge.

Rapid Adoption of COP/COC Polymer Syringes

ClearJect polymer syringes from Gerresheimer deliver break-resistant, glue-free formats that appeal to self-injection therapies. SCHOTT Pharma's TOPPAC Freeze targets mRNA drugs that need deep-cold durability, underscoring polymer versatility. Patient safety concerns for fragile glass in at-home settings accelerate polymer acceptance in high-value niches. While glass maintains dominance for conventional injectables, polymers now capture incremental share in viscous biologics and high-volume autoinjectors. This competitive encroachment creates a modest drag on the pharmaceutical glass packaging market over the medium term.

Other drivers and restraints analyzed in the detailed report include:

Shift to Ready-to-Use (RTU) Vials and Syringes / Rising Demand for High-Value Borosilicate Type I Glass / Volatile Soda-Ash and Energy Prices Inflating Glass Cost /

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

Segment Analysis

Vials retained 35.42% revenue in 2024 as their flexibility spans vaccines, lyophilized biologics and clinical batches. Steady demand lets SGD Pharma run more than 8 million vials daily across five plants, safeguarding global supply continuity. The pharmaceutical glass packaging market size for vials is projected to grow as destocking subsides and oncology pipelines refill commercial inventories. Prefillable syringes and cartridges expand fastest at a 7.53% CAGR, propelled by subcutaneous biologics and GLP-1 antagonists that favor ready-to-inject formats. BD's latest eight-millimeter needles address higher viscosity formulations, removing one adoption hurdle. Bottles hold steady in oral suspensions and pediatric electrolytes, whereas ampoules preserve niche demand for heat-stable anesthetics. Specialty formats, including dual-chamber systems, rise alongside complex combination therapies. Across products, AI inspection continues to trim scrap rates, protecting margins within the pharmaceutical glass packaging market.

The shift toward patient-centric care pushes drug developers to prioritize convenience, adherence and reduced clinic visits. Cartridge-based pens accommodate multi-dose regimes, while autoinjectors ensure accurate dose delivery without professional oversight. Vial makers lean on modular filling lines to remain competitive, offering hybrid batches that switch between clear and amber containers with minimal downtime. Coating technologies that reduce particle generation and ease siliconization broaden the performance envelope for glass. Consequently, every product category now competes on a mix of regulatory robustness, machinability and total cost of ownership, heightening differentiation within the pharmaceutical glass packaging market.

Type I borosilicate captured 55.32% revenue in 2024 thanks to sterling chemical resistance and global pharmacopeia acceptance. Its dominance will persist as high-concentration biologics and antibody-drug conjugates demand inert surfaces. The pharmaceutical glass packaging market size for Type I containers benefits further from new compositions like boron-free Valor that virtually eliminate delamination risk. Treated Type II soda-lime glass, however, posts a 6.86% CAGR as surface coatings extend suitability to mildly acidic injectables at lower cost, offering an attractive balance between performance and budget. Gerresheimer's latest Type II lines broaden options for mid-tier therapies that cannot justify premium borosilicate pricing.

Type III glass remains common for oral liquids, cough syrups and dropper bottles where pH neutrality dominates over hydrolytic stress. Meanwhile, colored amber variants shield photolabile drugs and line extensions of ophthalmic antivirals. Recycled content climbs as large pharma institutes Scope 3 emission targets; SGD Pharma now offers 20% post-consumer cullet in selected ranges without compromising regulatory compliance. Over the forecast horizon, sustainability scoring will intensify procurement decisions, making life-cycle analysis an embedded value proposition across all glass types of the pharmaceutical glass packaging market.

The Pharmaceutical Glass Packaging Market Report is Segmented by Product (Bottles, Vials, Ampoules, and More), Glass Type (Type I Borosilicate, Type II Treated Soda-Lime, and More), Drug Formulation (Injectables, Oral Liquids, Ophthalmic/Nasal, Topical), End-User (Pharma Innovator Companies, Generic and CMOs, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America generated 38.98% of 2024 revenue, fueled by intense R&D pipelines, strong venture funding and strict compliance culture. SCHOTT Pharma's USD 371 million investment in North Carolina is slated to triple domestic output of RTU syringes by 2030, further cementing regional leadership. Federal incentives for advanced manufacturing also speed furnace rebuilds into electric hybrids, aligning with carbon-reduction targets. Robust demand for GLP-1 therapeutics and oncology biologics sustains multi-shift operations at major converters, guarding against volume swings in legacy generics.

Europe maintains balanced growth, underpinned by its stringent regulatory environment and early sustainability mandates. The new EU Packaging and Packaging Waste Regulation 2025/40 exempts critical pharma glass from some recycling quotas, yet brand owners voluntarily pledge to integrate cullet to meet corporate net-zero goals. Political support for strategic drug reserves post-COVID fosters local vial and cartridge capacity. However, energy costs remain a competitive thorn, pushing some producers to relocate capacity to lower-cost regions unless green power tariffs stabilize.

Asia-Pacific records the fastest 8.12% CAGR, powered by manufacturing scale-ups in China and India where the 2023 biopharma market stood at 650.6 billion yuan and is forecast to double by 2029. Government stimulus packages encourage high-end glass imports even as domestic players ramp furnace rebuilds. Multinational CDMOs establish fill-finish sites in Singapore and South Korea, raising regional specifications to US and EU levels and enlarging the addressable pharmaceutical glass packaging market. Southeast Asian vaccine institutes leverage concessional funding to build fill-finish lines, further lifting vial demand.

South America and the Middle East & Africa trail in absolute numbers but gain momentum as local generics houses expand facility footprints to cut import reliance. Brazil's stringent ANVISA rules compel packaging upgrades, and Gulf states pursue health-care investment drives as part of economic diversification plans. Importantly, regional arteries for soda ash and LPG energy ease furnace-fuel concerns, positioning select emerging markets as secondary hubs for export-oriented production within the pharmaceutical glass packaging market.

List of Companies Covered in this Report:

Gerresheimer AG / Schott AG / SGD Pharma / Stevanato Group / Corning Inc. / Nipro Corp. / West Pharmaceutical Services / Bormioli Pharma / Owens-Illinois (Ardagh Glass Pharma) / Stolzle Glass Group / Beatson Clark / Shandong Medicinal Glass / Arab Pharmaceutical Glass / Piramal Glass / Sisecam Group / Baxter BioPharma Solutions / Kindeva Drug Delivery / Origin Pharma Packaging / DWK Life Sciences / GerroMed (under-reported niche) /

Additional Benefits:

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

Table of Contents:

5.1.2 Vials
5.1.3 Ampoules
5.1.4 Cartridges and Prefillable Syringes
5.1.5 Other Product
5.2 By Glass Type
5.2.1 Type I Borosilicate
5.2.2 Type II Treated Soda-Lime
5.2.3 Type III Soda-Lime
5.2.4 Other Glass Type
5.3 By Drug Formulation
5.3.1 Injectables
5.3.2 Oral Liquids
5.3.3 Ophthalmic / Nasal
5.3.4 Topical
5.4 By End-User
5.4.1 Pharma Innovator Companies
5.4.2 Generic and CMOs
5.4.3 Biotech Firms
5.4.4 Compounding Pharmacies
5.4.5 Veterinary Pharma
5.5 By Geography
5.5.1 North America
5.5.1.1 United States
5.5.1.2 Canada
5.5.1.3 Mexico
5.5.2 Europe
5.5.2.1 Germany
5.5.2.2 United Kingdom
5.5.2.3 France
5.5.2.4 Italy
5.5.2.5 Spain
5.5.2.6 Russia
5.5.2.7 Rest of Europe
5.5.3 Asia-Pacific
5.5.3.1 China
5.5.3.2 India
5.5.3.3 Japan
5.5.3.4 South Korea
5.5.3.5 Australia and New Zealand
5.5.3.6 Rest of Asia-Pacific
5.5.4 Middle East and Africa
5.5.4.1 Middle East
5.5.4.1.1 United Arab Emirates
5.5.4.1.2 Saudi Arabia
5.5.4.1.3 Turkey
5.5.4.1.4 Rest of Middle East
5.5.4.2 Africa

SCOTTS INTERNATIONAL

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

Market Report | 2025-07-01 | 159 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	2026-02-25
		Signature	

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