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Nano-Enabled Packaging for the Pharmaceutical Industry: a Technology, Industry and Market Analysis

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Packaging in the pharmaceutical industry has gone through major changes in the past decade. The advent of new drug delivery systems and the development of new biochemical compounds have resulted in a need not only for enhanced protection against factors such as moisture, light, oxygen and mechanical forces, but also for packaging forms to play a more integral role in the drug delivery process. Packaging design today provides stability and shelf life to the drug and the delivery system, which becomes fundamental to the safety, convenience and compliance of drug use.

Nanotechnology, the science of very small materials, is poised to have a big impact in pharmaceutical packaging. Basic categories of nanotechnology applications and functionalities appear in development of pharmaceutical (or pharma) packaging in terms of enhancement of plastic materials' barriers; incorporation of active components that can deliver functional attributes beyond those of conventional active packaging; and sensing and signaling of relevant information.

STUDY GOAL AND OBJECTIVES

The study is intended to benefit existing manufacturers of pharmaceuticals who seek to expand market opportunities. It also can serve as a reference for pharma packaging industry players who would like to expand to nano-enabled technologies for drug packaging. This study also provides the most complete accounting of nano-enabled packaging of pharmaceutical products in various markets around the globe.

The main objective of this report is to understand the current state of nano-enabled packaging in the pharmaceutical industry, market opportunities, the companies involved, technologies being pursued and intellectual property (IP) trends.

This study covers various aspects of nano-enabled packaging, providing data about the size and growth of application segments, industry trends, new developments including a detailed patent analysis, and company profiles. Another goal of this report is to provide a detailed and comprehensive multi-client study of the market in North America, Europe, Asia Pacific and the rest of the world for nano-enabled packaging, as well as potential business opportunities emerging in the future.

The study objectives include thorough coverage of the underlying economic issues driving the nano-enabled packaging business, as well as assessments of new advanced nano-enabled packaging that are being developed. Particular attention was paid to providing realistic market data and forecasts for the nano-enabled packaging industry segments. This study provides the most thorough and up-to-date assessment that can be found anywhere on the subject. The study also provides extensive quantification of the many important facets of market developments in nano-enabled packaging all over the world. Ultimately, the study contributes to the determination of the kinds of strategic responses that can be adopted by companies hoping to compete in this dynamic market.

REASONS FOR DOING THE STUDY

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In the pharmaceutical industry, there is an ever growing emphasis on security, as well as on patient convenience and greater automation, without compromising quality or safety standards. Increasing importance has been placed on the role that packaging plays in establishing brand preference.

The role of packaging in pharmaceuticals has taken an incremental leap forward in terms of its critical importance as an integral part of the product. New packaging solutions will focus more on drug safety by controlling microbial growth, delaying oxidation, improving tamper visibility and enhancing convenience. Therefore, iRAP felt a need to do a detailed market update and analysis for this industry.

CONTRIBUTIONS OF THE STUDY

This study provides the most complete accounting of the nano-enabled pharma packaging market growth in North America, Europe, Asia Pacific and the rest of the world currently available in a multi-client format. It provides the most thorough and up-to-date assessment that can be found anywhere on the subject and includes extensive quantification of the many important facets of market developments in various markets for nano-enabled pharma packaging. This quantification, in turn, contributes to the determination of strategic responses that suppliers may adopt in order to compete in these dynamic markets. Audiences for this study include marketing executives, business unit managers and other decision makers in the pharma packaging companies, as well as in companies peripheral to this business.

SCOPE AND FORMAT

The market data contained in this report quantifies opportunities for nano-enabled packaging technologies, nanomaterials used for packaging, and technology applications. In addition to product types, it also covers the merits and future prospects of the nano-enabled pharma packaging business. It also covers in detail the economic and regulatory issues regarded by many as critical to the industry's current state of change. The report provides a review of the nanotechnologies involved in the pharma packaging industry, its structure, and the companies involved in providing these packaged products.

TO WHOM THE STUDY CATERS

The report provides the most thorough and up-to-date assessment that can be found anywhere on the subject. The study is intended to benefit current pharma packaging producers and users as well as developers of new technologies in this area. Specifically, the report would be of great use to:

- producers and suppliers of pharma packaging;
- suppliers of pharma packaging materials;
- resin supplier;
- producers and suppliers of nanoparticles;
- users of pharma packaging;
- universities and research institutions involved in research in the pharma packaging area;
- investors and venture capitalists interested in new technology areas.

REPORT SUMMARY

Packaging in the pharmaceutical industry has gone through major changes in the past decade. The advent of new drug delivery systems and the development of new biochemical compounds have resulted in a need not only for enhanced protection against factors such as moisture, light, oxygen and mechanical forces, but also for packaging forms to play a more integral role in the drug delivery process.

Nanotechnology is poised to have a big impact in pharmaceutical packaging and will enable it to bring innovative and new generation packaging solutions to market. The addition of certain nanoparticles into shaped objects and films has been shown to render them light, fire-resistant and stronger in terms of

mechanical and thermal performance, as well as less permeable to gases. Thus, it is possible to make new packaging solutions that focus more on drug safety by controlling microbial growth and delaying oxidation as well as improving tamper visibility and anti-counterfeiting.

As nanotechnology meets the new demands of pharma packaging, there are opportunities for tremendous growth in next few years. To clearly understand the landscape and undercurrents, the nano-enabled packaging for pharma industry has been segmented by:

- technology – active and smart packaging;
- pharma packaging applications – blisters, containers, bottles, pouches, syringes etc.;
- market regions – namely, North America, Latin America, Europe (including Russia), Asia Pacific and China.

The total market for nano-enabled packaging for pharma is $3.8 billion in 2009, which is expected to grow to $8.1 billion by 2014, at a compound annual growth rate (CAGR) of 16.48% from 2009 to 2014.

Other major findings of this report are:

- The U.S. and Europe will remain the largest consumers of pharmaceutical packaging, as their advanced drug-producing sectors introduce new therapies with specialized packaging needs.
- The North America market for nano-enabled packaging in pharma will grow from $1.08 billion in 2008 to $2.03 billion by 2014. The European market will grow from $1.15 billion in 2008 to $1.46 billion in 2014.
- Japan continues to have the major share of the Asia Pacific market (65%), but its share is expected to decrease as India evolves into a fast-growing pharmaceutical packaging market as drug-producing sectors are upgraded and diversified, especially in the area of generic drugs.
- China’s growth opportunities will be among the strongest, based on rapidly expanding pharmaceutical manufacturing capabilities there and the phasing-in of a government program designed to upgrade the quality and integrity of nationally produced medicines.

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TECHNOLOGY OVERVIEW

MARKET ANALYSIS

PATENTS AND PATENT ANALYSIS

COMPANY PROFILES

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