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Global Bio-based Pharmaceutical Packaging Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Bio-based Pharmaceutical Packaging market size was valued at US$ 166 million in 2025 and is forecast to a readjusted size of US$ 341 million by 2032 with a CAGR of 11.1% during review period.

In 2025, global production of bio-based pharmaceutical packaging stood at approximately 620,000 thousand units, with a global average market price of around $260 per thousand units. That year, total global production capacity reached 900,000 thousand units per annum, and the industry's average gross profit margin hit 29%. Bio-based pharmaceutical packaging refers to packaging materials and products manufactured wholly or partially from renewable biomass feedstocks; the bio-based carbon content is primarily derived from sources such as sugarcane, corn, cassava, vegetable oils, wood, and agricultural residues. Products include pharmaceutical bottles, caps, blister base films, packaging films, sachets, components for drug delivery devices, cartons, and pulp-based inserts. Common materials include bio-based PE, partially bio-based PET, PLA, PHA, bio-based polyamides, cellulose films, and paper-based materials.

The upstream sector primarily encompasses biomass feedstocks, bio-based chemical monomers and resins, pulp fibers, and functional additives. Sugars derived from sugarcane or corn can be further converted into bio-ethanol, ethylene, and lactic acid for the production of bio-based PE, PLA, and other polymers; castor oil can be used to produce bio-based polyamides, while wood and agricultural residues serve as raw materials for pharmaceutical cartons, cellulose films, and molded pulp inserts. Other upstream materials include barrier coatings, pharmaceutical-grade masterbatches, inks,

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adhesives, antistatic agents, and sealing materials; their purity, traceability, and safety regarding drug contact directly impact the packaging's regulatory compliance. The midstream sector consists mainly of companies specializing in the modification of bio-based packaging materials and manufacturers of pharmaceutical packaging, employing processes such as injection molding, blow molding, extrusion, thermoforming, film blowing, coating, printing, and pulp molding. Companies must optimize material barrier properties against water vapor and oxygen to suit specific drugs and conduct validation studies regarding migrants, extractables and leachables, drug compatibility, seal integrity, and sterilization stability. Currently, bio-based materials are best suited for solid oral dosage forms, over-the-counter (OTC) drugs, health supplements, and secondary packaging; for high-risk products such as injectables and biologics, the adoption cycle is typically longer due to stringent requirements regarding material purity and long-term stability. The downstream sector primarily includes pharmaceutical companies, biotechnology firms, pharmaceutical CDMOs, health supplement manufacturers, hospitals, pharmacies, and pharmaceutical distribution organizations. Large pharmaceutical companies typically procure bottles, caps, blister packs, and cartons from packaging material suppliers and converters, utilizing them only after undergoing supplier audits, regulatory registration and filing, and stability verification.

Decarbonization targets within pharmaceutical supply chains are the primary driver behind the development of bio-based pharmaceutical packaging. Given the high consumption volumes and predominantly single-use nature of pharmaceutical packaging, it represents a critical area for managing Scope 3 carbon emissions and reducing plastic usage. Bio-based PE, PET, and composite materials—derived from renewable feedstocks such as sugarcane, corn, vegetable oils, and cellulose—reduce reliance on fossil-based raw materials while maintaining functional performance; consequently, they are increasingly being adopted for tablet bottles, effervescent tablet tubes, pharmaceutical tubes, and certain drug delivery devices.

Policies promoting the circular economy, Extended Producer Responsibility (EPR) schemes, and sustainability requirements in healthcare procurement are also compelling packaging manufacturers to develop low-carbon products. However, while these policies emphasize packaging reduction, design-for-recyclability, and waste management, the use of bio-based materials does not automatically guarantee regulatory approval for pharmaceutical packaging applications. Unlike packaging for food or cosmetics, pharmaceutical packaging must undergo rigorous validation regarding drug compatibility, extractables and leachables, barrier properties, seal integrity, sterilization stability, and long-term storage performance. This results in longer

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adoption cycles and higher switching costs for customers.

Market trends indicate that the application of bio-based pharmaceutical packaging will initially expand within the sectors of over-the-counter (OTC) drugs, dietary supplements, oral solid dosage forms, and topical medications, before gradually extending to nasal sprays, ophthalmic preparations, and other drug delivery systems. Future competition will shift from the mere supply of bio-based resins to a comprehensive capability model encompassing material development, packaging manufacturing, regulatory validation, and global supply. The industry continues to face challenges such as high bio-based resin costs, limited supplies of pharmaceutical-grade raw materials, fragmented recycling systems, and potential confusion between mass-balance products and actual bio-based content. Consequently, companies capable of achieving scaled production, providing comprehensive validation data, and ensuring long-term supply reliability will be better positioned to establish competitive market advantages.

Report Scope

This report is a detailed and comprehensive analysis for global Bio-based Pharmaceutical Packaging market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Bio-based Pharmaceutical Packaging market size and forecasts, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global Bio-based Pharmaceutical Packaging market size and forecasts by region and country, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global Bio-based Pharmaceutical Packaging market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (K Units), and average

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selling prices (US$/Unit), 2021-2032

Global Bio-based Pharmaceutical Packaging market shares of main players, shipments in revenue ($ Million), sales quantity (K Units), and ASP (US$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Bio-based Pharmaceutical Packaging

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Bio-based Pharmaceutical Packaging market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Sanner, Gualapack, CurTec, Pont Packaging, Bormioli Pharma, Nissha, Braskem, IPL Schoeller, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Bio-based Pharmaceutical Packaging market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Bottles

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Bags

Caps

Others

Market segment by Material

Bio-based PE Packaging

Bio-based PET Packaging

Bio-based PLA Packaging

Bio-based PHA Packaging

Others

Market segment by Packaging Level

Primary Packaging

Secondary Packaging

Market segment by Bio-based Content

Low Bio-based Content (0–50%)

High Bio-based Content (over 50%)

Market segment by Application

Oral Medicine

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Injectable Drugs

Others

Major players covered

Sanner

Gualapack

CurTec

Pont Packaging

Bormioli Pharma

Nissha

Braskem

IPL Schoeller

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

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Chapter Outline

Chapter 1, to describe Bio-based Pharmaceutical Packaging product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Bio-based Pharmaceutical Packaging, with price, sales quantity, revenue, and global market share of Bio-based Pharmaceutical Packaging from 2021 to 2026.

Chapter 3, the Bio-based Pharmaceutical Packaging competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Bio-based Pharmaceutical Packaging breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Bio-based Pharmaceutical Packaging market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Bio-based Pharmaceutical Packaging.

Chapter 14 and 15, to describe Bio-based Pharmaceutical Packaging sales channel, distributors, customers, research findings and conclusion.

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