

Adherence Packaging Market Report: Trends, Forecast and Competitive Analysis to 2031

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Abstracts

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Adherence Packaging Trends and Forecast

The future of the global adherence packaging market looks promising with opportunities in the retail pharmacy, hospital, and long-term center markets. The global adherence packaging market is expected to reach an estimated \$1.1 billion by 2031 with a CAGR of 6.0% from 2025 to 2031. The major drivers for this market are the increasing demand for adherence solutions to manage multiple medications, the rising demand for patient-centric packaging, and the expanding adoption of digital health technologies.

Lucintel forecasts that, within the type category, plastic film is expected to witness the highest growth over the forecast period.

Within the application category, retail pharmacy will remain the largest segment.

In terms of regions, North America is expected to witness the highest growth over the forecast period.

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Emerging Trends in the Adherence Packaging Market

The adherence packaging market is witnessing several emerging trends driven by technological advancements, patient needs, and regulatory changes. These trends are reshaping how medications are packaged and delivered to improve patient adherence and overall healthcare outcomes.

Smart Packaging Solutions: The rise of smart packaging solutions with digital features, such as reminders and tracking, is transforming adherence management. These technologies enhance patient engagement by providing real-time notifications and monitoring medication usage, leading to improved adherence rates and better health outcomes.

Integration with Mobile Health Apps: Integration of adherence packaging with mobile health applications is becoming increasingly common. This trend allows for seamless communication between patients and healthcare providers, enabling better tracking of medication adherence and facilitating timely interventions when issues arise.

Personalized Medication Packaging: Personalized adherence packaging tailored to individual patient needs is gaining traction. Customization based on patient-specific factors, such as dosage schedules and health conditions, improves the relevance and effectiveness of medication management solutions, enhancing overall patient compliance.

Sustainability and Eco-Friendly Materials: There is a growing emphasis on sustainable and eco-friendly materials in adherence packaging. Companies are focusing on reducing environmental impact by using recyclable and biodegradable materials, aligning with global sustainability goals, and responding to increasing consumer demand for environmentally responsible solutions.

Regulatory Compliance and Standards: Adherence packaging solutions are increasingly designed to meet stringent regulatory requirements and standards. This trend ensures that packaging solutions are not only effective in improving adherence but also compliant with regulatory guidelines, enhancing safety and quality across different markets.

These emerging trends are driving significant changes in the adherence packaging market, emphasizing technological innovation, patient-centered solutions, and environmental sustainability. These developments are reshaping the market by improving medication adherence and contributing to more effective healthcare management.

Recent Developments in the Adherence Packaging Market

Recent developments in the adherence packaging market reflect ongoing

advancements in technology, materials, and regulatory compliance. These changes are aimed at improving patient adherence to prescribed therapies and enhancing overall healthcare outcomes.

Digital Adherence Solutions: The introduction of digital adherence solutions, such as smart pill bottles and connected packaging, has revolutionized patient compliance. These solutions provide real-time reminders and tracking capabilities, significantly improving medication adherence and patient engagement.

Advancements in Blister Packaging: Innovations in blister packaging, including tamper-evident features and easy-to-open designs, are enhancing medication management. These developments are aimed at improving usability and ensuring the safety and integrity of medications.

Integration with Health Records: Adherence packaging systems are increasingly integrated with electronic health records (EHRs) and mobile health apps. This integration facilitates better tracking of medication usage and enables healthcare providers to monitor patient adherence more effectively.

Sustainable Packaging Materials: The adoption of sustainable and eco-friendly materials in adherence packaging is on the rise. Companies are focusing on reducing environmental impact by using recyclable and biodegradable materials, aligning with global sustainability trends.

Regulatory Updates: Recent updates in regulatory standards are driving improvements in adherence packaging. Compliance with new regulations ensures that packaging solutions meet high safety and quality standards, contributing to better patient outcomes and market acceptance.

These recent developments are advancing the adherence packaging market by enhancing technology, usability, sustainability, and regulatory compliance. These changes are crucial for improving patient adherence, safety, and overall effectiveness of medication management solutions.

Strategic Growth Opportunities for Adherence Packaging Market

The adherence packaging market offers several strategic growth opportunities across various applications. These opportunities are driven by technological advancements, increasing patient needs, and evolving healthcare trends.

Expansion in Chronic Disease Management: The growing prevalence of chronic diseases presents a significant opportunity for adherence packaging solutions. Developing advanced packaging systems tailored to chronic disease management can improve patient adherence and health outcomes.

Growth in Digital Health Integration: Integrating adherence packaging with digital health technologies, such as mobile apps and remote monitoring systems, offers substantial growth potential. This integration enhances medication tracking and patient engagement, driving demand for innovative adherence solutions.

Emergence of Personalized Packaging Solutions: There is a growing demand for personalized medication packaging that caters to individual patient needs. Tailoring packaging based on patient-specific factors, such as dosage schedules and health conditions, presents a valuable opportunity for market growth.

Focus on Sustainable Packaging: The increasing emphasis on sustainability provides an opportunity for growth in eco-friendly adherence packaging. Developing recyclable and biodegradable materials can attract environmentally conscious consumers and align with global sustainability goals.

Enhancement of Regulatory Compliance: As regulatory standards evolve, there is an opportunity to innovate adherence packaging solutions that meet new requirements. Ensuring compliance with updated regulations can enhance market acceptance and expand business opportunities.

These strategic growth opportunities highlight the potential for innovation and expansion in the adherence packaging market. Focusing on chronic disease management, digital health integration, personalization, sustainability, and regulatory compliance can drive significant market growth and improve patient adherence.

Adherence Packaging Market Driver and Challenges

The adherence packaging market is influenced by a range of drivers and challenges that impact its development and growth. These factors include technological advancements, economic conditions, and regulatory requirements.

The factors responsible for driving the adherence packaging market include:

1. **Technological Advancements:** Innovations in digital and smart packaging technologies are driving the market. Advanced solutions, such as smart pill bottles and connected systems, improve patient adherence and medication management, fueling market growth.

2. **Increasing Demand for Chronic Disease Management:** The rising prevalence of chronic diseases is driving demand for effective adherence packaging solutions. Tailored packaging systems that enhance medication management for chronic conditions are in high demand.

3. **Integration with Digital Health Solutions:** The growing integration of adherence packaging with digital health technologies, such as mobile apps and electronic health records, is a significant driver. This integration enhances tracking and monitoring, improving patient adherence.

4. **Regulatory Support and Compliance:** Supportive regulatory environments and compliance requirements drive innovation in adherence packaging. Adhering to stringent regulations ensures safety and quality, enhancing market growth and acceptance.

5. **Focus on Patient-Centered Solutions:** The shift towards patient-centered healthcare is driving the development of personalized adherence packaging solutions. Tailoring packaging to individual needs improves adherence and overall patient satisfaction.

Challenges in the adherence packaging market are:

1. **High Costs of Advanced Packaging Solutions:** The cost of developing and implementing advanced adherence packaging solutions can be a barrier. Balancing performance with affordability is a challenge for manufacturers and healthcare providers.

2. **Regulatory Complexity:** Navigating complex regulatory requirements can be challenging. Ensuring compliance with diverse regulations across different markets can increase development time and costs.

3. **Integration with Existing Systems:** Integrating new adherence packaging technologies with existing healthcare systems can be difficult. Ensuring compatibility and seamless operation with legacy systems is essential for successful implementation.

The adherence packaging market is shaped by drivers such as technological advancements, chronic disease management, and regulatory support, while challenges include high costs, regulatory complexity, and integration issues. Addressing these factors is crucial for the market's continued growth and success.

List of Adherence Packaging Companies

Companies in the market compete on the basis of product quality offered. Major players in this market focus on expanding their manufacturing facilities, R&D investments, infrastructural development, and leverage integration opportunities across the value chain. Through these strategies adherence packaging companies cater increasing demand, ensure competitive effectiveness, develop innovative products & technologies, reduce production costs, and expand their customer base. Some of the adherence packaging companies profiled in this report include-

Cardinal Health

Westrock

Omnicell

Genoa

Parata

Amcor

Medicine-On-Time

Adherence Packaging by Segment

The study includes a forecast for the global adherence packaging market by type, application, and region.

Adherence Packaging Market by Type [Analysis by Value from 2019 to 2031]:

Plastic Film

Paper & Paperboard

Aluminum

Others

Adherence Packaging Market by Application [Analysis by Value from 2019 to 2031]:

Retail Pharmacy

Hospital

Long-Term Center

Others

Adherence Packaging Market by Region [Analysis by Value from 2019 to 2031]:

North America

Europe

Asia Pacific

The Rest of the World

Country Wise Outlook for the Adherence Packaging Market

The adherence packaging market is evolving rapidly as healthcare systems and pharmaceutical companies seek innovative solutions to improve patient compliance and medication management. Recent developments include advancements in technology, increasing adoption of smart packaging solutions, and regulatory changes aimed at enhancing medication adherence.

United States: In the U.S., advancements in digital adherence packaging are transforming patient management. Innovations include smart pill bottles with connectivity features that remind patients to take their medications. Integration with mobile health apps and electronic health records (EHRs) is improving tracking and compliance rates. Increased focus on personalized medicine is also driving the development of customized adherence solutions.

China: China is experiencing growth in adherence packaging driven by its expanding healthcare infrastructure and increasing demand for chronic disease management. New developments include affordable, scalable blister packs and compliance-enhancing technologies. The government's push towards improved healthcare delivery and patient-centered care is fostering innovation in adherence packaging.

Germany: Germany is advancing in adherence packaging with a focus on regulatory compliance and environmental sustainability. Recent developments include eco-friendly packaging solutions and adherence systems integrated with electronic health records for better monitoring. Germany's stringent regulatory environment is driving the adoption of high-quality, compliant adherence packaging solutions.

India: In India, the adherence packaging market is evolving with affordable, user-friendly solutions to address the diverse needs of patients. Innovations include low-cost blister packs and simplified medication management systems. The rise of digital health initiatives and government programs aimed at improving healthcare access is accelerating the adoption of adherence packaging.

Japan: Japan is at the forefront of incorporating technology into adherence packaging. Recent advancements include smart packaging with digital features such as dosage reminders and tracking. Japan's emphasis on advanced healthcare technologies and its aging population are driving demand for sophisticated adherence solutions that enhance medication management and compliance.

Features of the Global Adherence Packaging Market

Market Size Estimates: Adherence packaging market size estimation in terms of value (\$B).

Trend and Forecast Analysis: Market trends (2019 to 2024) and forecast (2025 to 2031) by various segments and regions.

Segmentation Analysis: Adherence packaging market size by type, application, and region in terms of value (\$B).

Regional Analysis: Adherence packaging market breakdown by North America, Europe, Asia Pacific, and Rest of the World.

Growth Opportunities: Analysis of growth opportunities in different types, applications, and regions for the adherence packaging market.

Strategic Analysis: This includes M&A, new product development, and competitive landscape of the adherence packaging market.

Analysis of competitive intensity of the industry based on Porter's Five Forces model.

If you are looking to expand your business in this market or adjacent markets, then contact us. We have done hundreds of strategic consulting projects in market entry, opportunity screening, due diligence, supply chain analysis, M & A, and more.

This report answers following 11 key questions:

Q.1. What are some of the most promising, high-growth opportunities for the adherence packaging market by type (plastic film, paper & paperboard, aluminum, and others), application (retail pharmacy, hospital, long-term center, and others), and region (North America, Europe, Asia Pacific, and the Rest of the World)?

Q.2. Which segments will grow at a faster pace and why?

Q.3. Which region will grow at a faster pace and why?

Q.4. What are the key factors affecting market dynamics? What are the key challenges

and business risks in this market?

Q.5. What are the business risks and competitive threats in this market?

Q.6. What are the emerging trends in this market and the reasons behind them?

Q.7. What are some of the changing demands of customers in the market?

Q.8. What are the new developments in the market? Which companies are leading these developments?

Q.9. Who are the major players in this market? What strategic initiatives are key players pursuing for business growth?

Q.10. What are some of the competing products in this market and how big of a threat do they pose for loss of market share by material or product substitution?

Q.11. What M&A activity has occurred in the last 5 years and what has its impact been on the industry?

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