

Temperature Controlled Packaging Solutions Market by Type (Active, Passive), Product, Usability (Single, Reuse), Revenue type (Product, Service), End-Use Industry (Pharma and Biopharma) & Region - Trends and Forecasts Up to 2026

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Abstracts

The global TCP market size was USD 34.4 billion in 2021 and is projected to reach USD 80.1 billion by 2026, at a CAGR of 18.4% between 2021 and 2026. Temperature-controlled packaging solution is a crucial part of the cold chain industry, involved in maintaining the desired temperature range for a predefined time for temperature-sensitive products. Pharma and Biopharma are end-use industries for Temperature-controlled packaging solutions. The products from these industries are temperature sensitive and are prone to temperature excursion during storage & shipment, degrading the efficacy of these products. There are two types of packaging systems for shipment of temperature-sensitive products: active system and passive system. The preference of the packaging system primarily depends on the type of product and cost incurred during shipment. Technology innovation and development in the packaging industry have led to the development of highly advance temperature-controlled packaging products. The market is projected to grow steadily due to the growing demand for these packaging solutions in various end-use industries.

“Active Systems is projected to be largest segment by type in TCP market”

Active systems are the largest type segment for TCP Market. Active containers have active temperature control, that means it maintains specific temperature range with minimum deviation. The systems are available in three types: - heat & cool using dry ice; cool only; and heat & cool using compressors. Active systems are suitable for the shipment of large volumes payload with substantial transit time, such as international

shipments. North America is the significant market for active systems. The temperature accuracy provided by the active system is highest compared to the passive system. The active system provides a stable temperature for long-distance shipment. The system can efficiently manage the delay caused in the supply chain. There is less possibility of temperature excursion with the availability of a power source.

“Single use is projected to be largest segment by usability in TCP market during forecast region.”

Single use is the largest usability segment for TCP market. They are basic containers that are suitable for one shipment. These containers are a lightweight and a cheaper option compared to reusable packaging systems. The packaging system tends to generate packaging waste with the disposal of containers. The single-use container market is driven by its ease of use, which provides open-ended distribution, and there is no requirement for shipping containers back to their origin. These containers are a suitable option for remote locations where reverse logistics is not feasible. The growing demand for pharmaceutical or biopharma products (Vaccines, cell and gene therapy, and clinical trials) is expected to drive the market for single-use packaging systems in the forecast period.

“Pharma is the largest segment by end-use industry in TCP market during forecast region.”

Pharma industries include products that are derived from synthetic or chemical processes (artificial sources). Its products include medicines and other drugs. Pharmaceuticals are susceptible to be damaged due to temperature deviation, humidity, and other reasons. Therefore, the products are transported in temperature-controlled packaging solutions across the globe. The growing demand for pharmaceutical products expects to drive the market for temperature-controlled packaging solutions during the forecast period. The recent trends in temperature-controlled packaging solutions for pharmaceutical products include the use of data loggers, temperature sensors, and other software platforms to improve visibility across the cold chain and the utilization of advanced insulation materials and refrigerants in packaging material for longer transit times.

“By revenue type, Products account for largest share of TCP market”

The product in the temperature-controlled packaging market includes packaging systems (shippers/containers) and refrigerants. These packaging systems are available

in various sizes and temperature ranges. These temperature-controlled packaging are suitable for the shipment of products in the healthcare & life science industry and other industries. With the development of new drugs & vaccines, the requirement for safe and secure distribution has increased. The focus is on developing packaging systems that are suitable for long transit time and at the same time show minimum temperature deviation. In the COVID scenario, the demand for vaccines, drugs, and cell & gene therapy has increased. The distributions of these products require temperature-controlled packaging products.

“Insulated Shippers accounts for largest share in TCP market by products”

Insulated shippers are also known as parcel shipping systems. These are suitable for carrying a temperature-sensitive payload of volume ranging from 4 liters to 100 liters. These shippers are ideal for pharmaceuticals and clinical trial shipments. Insulated shippers include both single-use and reuse packaging systems. To provide temperature protection for highly temperature-sensitive shipment, insulated shippers utilize advanced vacuum-insulated materials and phase change materials. These are lightweight and economical options appropriate for the shipment of domestic, international, and last-mile delivery.

Extensive primary interviews were conducted to determine and verify the market size for several segments and sub segments and information gathered through secondary research.

The break-up of primary interviews is given below:

By Company Type - Tier 1 – 25%, Tier 2 – 42%, and Tier 3 – 33%

By Designation – C level – 20%, Director level – 30%, and Others* – 50%

By Region – North America– 40%, Europe – 10%, APAC – 20%, South America– 10%, and Middle East & Africa- 20%

Notes: Others include sales, marketing, and product managers.

Tier 1: >USD 1 Billion; Tier 2: USD 500 million–1 Billion; and Tier 3:

Contents

1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

1.2 MARKET DEFINITION

TABLE 1 MARKET SEGMENTATION DEFINITION, BY TYPE

TABLE 2 MARKET SEGMENTATION DEFINITION, BY USABILITY OF PASSIVE SYSTEMS

TABLE 3 MARKET SEGMENTATION DEFINITION, BY REVENUE OF PASSIVE SYSTEMS

TABLE 4 MARKET SEGMENTATION DEFINITION, BY PRODUCT

1.3 MARKET SCOPE

FIGURE 1 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SEGMENTATION

1.3.1 INCLUSIONS & EXCLUSIONS

TABLE 5 TABLE DEFINING THE INCLUSIONS & EXCLUSIONS OF THE REPORT

1.4 YEARS CONSIDERED FOR THE STUDY

1.5 CURRENCY

1.6 LIMITATIONS

1.7 STAKEHOLDERS

1.8 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Key industry insights

2.1.2.3 Breakdown of primary interviews

2.2 MARKET SIZE ESTIMATION

2.2.1 APPROACH 1: BASED ON THE PHARMACEUTICAL LOGISTICS MARKET - 2018 (USD MILLION)

FIGURE 3 APPROACH 1: BASED ON THE PHARMACEUTICAL LOGISTICS MARKET - 2018 (USD MILLION)

2.2.2 APPROACH 2: BASED ON GLOBAL PHARMACEUTICAL CHAIN LOGISTICS MARKET - 2019 (USD MILLION)

FIGURE 4 APPROACH 2: BASED ON GLOBAL PHARMACEUTICAL CHAIN LOGISTICS MARKET – 2019 (USD MILLION)

2.3 DATA TRIANGULATION

FIGURE 5 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET: DATA TRIANGULATION

2.4 RESEARCH ASSUMPTIONS AND LIMITATIONS

2.4.1 ASSUMPTIONS

2.4.2 LIMITATIONS

2.5 GROWTH RATE ASSUMPTIONS

2.6 FACTOR ANALYSIS IMPACTING GROWTH

FIGURE 6 FACTOR ANALYSIS IMPACTING GROWTH

3 EXECUTIVE SUMMARY

FIGURE 7 ACTIVE SYSTEMS HELD THE LARGEST SHARE IN 2020

FIGURE 8 PHARMA END-USE INDUSTRY HELD THE LARGER SHARE IN 2020

FIGURE 9 INSULATED SHIPPERS HELD THE LARGEST SHARE IN 2020

FIGURE 10 APAC IS THE LARGEST TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET

4 PREMIUM INSIGHTS

4.1 SIGNIFICANT OPPORTUNITIES IN THE TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET

FIGURE 11 GROWTH IN PHARMA/BIOPHARMA SECTOR TO OFFER MARKET OPPORTUNITIES

4.2 NORTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY TYPE, END-USE INDUSTRY, AND COUNTRY, 2020

FIGURE 12 US ACCOUNTED FOR THE LARGEST SHARE IN NORTH AMERICA

4.3 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY TYPE
FIGURE 13 ACTIVE SYSTEMS TO DOMINATE THE OVERALL TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, 2021–2026

4.4 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY USABILITY

FIGURE 14 SINGLE USE PACKAGING SYSTEM TO DOMINATE THE OVERALL TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, 2021–2026

4.5 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY

REVENUE TYPE

FIGURE 15 PRODUCTS TO DOMINATE THE OVERALL TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, 2021–2026

4.6 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY PRODUCT

FIGURE 16 INSULATED SHIPPERS TO DOMINATE THE OVERALL TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, 2021–2026

4.7 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY END-USE INDUSTRY

FIGURE 17 PHARMA TO DOMINATE THE OVERALL TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, 2021–2026

4.8 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY COUNTRY

FIGURE 18 INDIA TO BE THE FASTEST-GROWING MARKET FOR TEMPERATURE-CONTROLLED PACKAGING

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET OVERVIEW

FIGURE 19 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN THE TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET

5.2.1 DRIVERS

5.2.1.1 Growth in biopharmaceuticals due to COVID-19

TABLE 6 COVID-19 VACCINE BY REGION, APRIL 2021

5.2.1.2 Use of advanced insulation material, last mile delivery, and low cost driving the use of passive systems in temperature-controlled packaging solutions market

TABLE 7 ACTIVE VS PASSIVE SYSTEM

5.2.1.3 Increasing demand for reusable containers due to lower environmental impact helping companies to become more sustainable

5.2.2 RESTRAINTS

5.2.2.1 Stringent regulations on the shipment of temperature-sensitive products

5.2.3 OPPORTUNITIES

5.2.3.1 Adoption of digitization to help companies cut operational costs and decrease manual checks

5.2.3.2 Focus on green initiatives to minimize the environmental impact

5.2.4 CHALLENGES

5.2.4.1 Customs handling and lack of infrastructure for temperature-sensitive shipment in developing economies

5.3 PORTER'S FIVE FORCES ANALYSIS

FIGURE 20 PORTER'S FIVE FORCES ANALYSIS OF THE TEMPERATURE-CONTROLLED PACKAGING MARKET

5.3.1 BARGAINING POWER OF SUPPLIERS

5.3.2 BARGAINING POWER OF BUYERS

5.3.3 INTENSITY OF COMPETITIVE RIVALRY

5.3.4 THREAT OF NEW ENTRANTS

5.3.5 THREAT OF SUBSTITUTES

TABLE 8 TEMPERATURE-CONTROLLED PACKAGING MARKET: PORTER'S FIVE FORCES ANALYSIS

5.4 MACROECONOMIC INDICATORS

TABLE 9 WORLD GDP GROWTH PROJECTION

TABLE 10 PHARMACEUTICAL SPENDING, BY COUNTRY (US DOLLAR/CAPITA)

TABLE 11 PHARMACEUTICAL EXPORTS, BY COUNTRY (USD MILLION)

5.5 VALUE CHAIN ANALYSIS

FIGURE 21 TEMPERATURE-CONTROLLED PACKAGING MARKET - VALUE CHAIN

5.6 IMPACT OF COVID-19 ON TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET

FIGURE 22 PRE & POST-COVID ANALYSIS OF TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS DEMAND

5.7 TECHNOLOGY ANALYSIS

5.7.1 ACTIVE SYSTEM

5.7.2 PASSIVE SYSTEM

5.8 REGULATORY LANDSCAPE

5.8.1 GOOD DISTRIBUTION PRACTICES

5.9 PATENT ANALYSIS

5.9.1 INTRODUCTION

5.9.2 METHODOLOGY

5.9.3 DOCUMENT TYPE

TABLE 12 GRANTED PATENTS ARE 23 % OF THE TOTAL COUNT IN THE LAST 10 YEARS

FIGURE 23 NUMBER OF PATENTS YEAR-WISE IN THE LAST 10 YEARS

5.9.4 PUBLICATION TRENDS - LAST 10 YEARS

FIGURE 24 NUMBER OF PATENTS YEAR-WISE IN THE LAST 10 YEARS

5.9.5 INSIGHTS

5.9.6 JURISDICTION ANALYSIS

FIGURE 25 TOP JURISDICTION, BY DOCUMENT

5.9.7 TOP COMPANIES/APPLICANTS

FIGURE 26 TOP 10 COMPANIES/APPLICANTS WITH THE HIGHEST NUMBER OF

PATENTS

TABLE 13 LIST OF PATENTS BY BERRY PLASTICS CORP.

TABLE 14 LIST OF PATENTS BY DAINIPPON PRINTING CO LTD.

TABLE 15 LIST OF PATENTS BY YETI COOLERS LLC

TABLE 16 LIST OF PATENTS BY SEKISUI PLASTICS

TABLE 17 LIST OF PATENTS BY CALIFORNIA INNOVATIONS INC.

TABLE 18 TOP 10 PATENT OWNERS (US) IN LAST 10 YEARS

5.10 RANGE SCENARIO OF TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET

FIGURE 27 RANGE SCENARIO OF TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS

5.11 YC, YCC SHIFT

FIGURE 28 ENVIRONMENTALLY FRIENDLY PRODUCTS AND DIGITIZATION OF PRODUCTS TO ENHANCE FUTURE REVENUE MIX

TABLE 19 YC, YCC AND SHIFT IN TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET

5.12 CASE STUDY

5.12.1 OPTIMIZING ACTIVE CONTAINERS TO MINIMIZE TEMPERATURE EXCURSION

FIGURE 29 CHARACTERISTICS OF ACTIVE CONTAINERS

5.12.2 SHIPMENT OF HARVESTED STEM CELLS IN TEMPERATURE-CONTROLLED PACKAGING

FIGURE 30 COLD CHAIN PROCESS FOR SHIPMENT OF HARVESTED STEM CELLS

5.13 CUSTOMER ANALYSIS

FIGURE 31 FACTORS IMPACTING CUSTOMERS ON THE SELECTION OF TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS

5.14 ECOSYSTEM MAP

FIGURE 32 ECOSYSTEM MAP OF TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET

5.15 ADJACENT AND RELATED MARKETS

5.15.1 INTRODUCTION

TABLE 20 ADJACENT MARKET

5.15.2 LIMITATIONS

5.15.3 METALIZED FLEXIBLE PACKAGING MARKET

5.15.3.1 Market definition

5.15.3.2 Metalized flexible packaging market, by material type

5.15.3.3 Metalized flexible packaging market, by structure

TABLE 21 METALIZED FLEXIBLE PACKAGING MARKET SIZE, BY STRUCTURE,

Temperature Controlled Packaging Solutions Market by Type (Active, Passive), Product, Usability (Single, Reuse...

2018–2025 (KILOTON)

TABLE 22 METALIZED FLEXIBLE PACKAGING MARKET SIZE, BY STRUCTURE, 2018–2025 (USD MILLION)

5.15.3.4 Metalized flexible packaging market, by packaging type

TABLE 23 METALIZED FLEXIBLE PACKAGING MARKET SIZE, BY PACKAGING TYPE, 2018–2025 (KILOTON)

TABLE 24 METALIZED FLEXIBLE PACKAGING MARKET SIZE, BY PACKAGING TYPE, 2018–2025 (USD MILLION)

5.15.3.5 Metalized flexible packaging market, by end-use industry

TABLE 25 METALIZED FLEXIBLE PACKAGING MARKET SIZE, BY END-USE INDUSTRY, 2018–2025 (KILOTON)

TABLE 26 METALIZED FLEXIBLE PACKAGING MARKET SIZE, BY END-USE INDUSTRY, 2018–2025 (USD MILLION)

5.15.3.6 Metalized flexible packaging market, by region

TABLE 27 METALIZED FLEXIBLE PACKAGING MARKET SIZE, BY REGION, 2018–2025 (KILOTON)

TABLE 28 METALIZED FLEXIBLE PACKAGING MARKET SIZE, BY REGION, 2018–2025 (USD MILLION)

5.15.4 INSULATED PACKAGING MARKET

5.15.4.1 Market definition

5.15.4.2 Insulated packaging market, by material type

TABLE 29 INSULATED PACKAGING MARKET SIZE, BY MATERIAL TYPE, 2018–2025 (KILOTON)

TABLE 30 INSULATED PACKAGING MARKET SIZE, BY MATERIAL TYPE, 2018–2025 (USD MILLION)

5.15.4.3 Insulated packaging market, by application

TABLE 31 INSULATED PACKAGING MARKET SIZE, BY APPLICATION, 2018–2025 (KILOTON)

TABLE 32 INSULATED PACKAGING MARKET SIZE, BY APPLICATION, 2018–2025 (USD MILLION)

5.15.4.4 Insulated packaging market, by packaging type

TABLE 33 INSULATED PACKAGING MARKET SIZE, BY PACKAGING TYPE, 2018–2025 (KILOTON)

TABLE 34 INSULATED PACKAGING MARKET SIZE, BY PACKAGING TYPE, 2018–2025 (USD MILLION)

5.15.4.5 Insulated packaging market, by type

TABLE 35 INSULATED PACKAGING MARKET SIZE, BY TYPE, 2018–2025 (KILOTON)

TABLE 36 INSULATED PACKAGING MARKET SIZE, BY TYPE, 2018–2025 (USD

MILLION)

5.15.4.6 Insulated packaging market, by electric & hybrid vehicle type

TABLE 37 INSULATED PACKAGING MARKET SIZE, BY ELECTRIC & HYBRID VEHICLE TYPE, 2020–2025 (TMT)

TABLE 38 INSULATED PACKAGING MARKET SIZE, BY ELECTRIC & HYBRID VEHICLE TYPE, 2020–2025 (USD BILLION)

5.15.4.7 Insulated packaging market, by region

TABLE 39 INSULATED PACKAGING MARKET SIZE, BY REGION, 2018–2025 (USD MILLION)

TABLE 40 INSULATED PACKAGING MARKET SIZE, BY REGION, 2018–2025 (KILOTON)

6 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY TYPE

6.1 INTRODUCTION

FIGURE 33 ACTIVE SYSTEMS ACCOUNTED FOR THE LARGER MARKET SHARE IN 2020 (BY VALUE)

TABLE 41 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

6.2 PASSIVE SYSTEMS

6.2.1 THE GROWTH OF BIOPHARMA INDUSTRIES IS A KEY DRIVER

TABLE 42 PASSIVE SYSTEMS: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REGION, 2019–2026 (USD MILLION)

6.3 ACTIVE SYSTEMS

6.3.1 RELIABLE SYSTEMS FOR SHIPMENT OF BULK VOLUME PAYLOAD

TABLE 43 ACTIVE SYSTEMS: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REGION, 2019–2026 (USD MILLION)

7 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY USABILITY OF PASSIVE SYSTEMS

7.1 INTRODUCTION

FIGURE 34 SINGLE USE ACCOUNTED FOR LARGER MARKET SHARE IN 2020 (BY VALUE)

TABLE 44 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

7.2 SINGLE USE

7.2.1 INEXPENSIVE OPTION FOR THE SHIPMENT OF TEMPERATURE-SENSITIVE PRODUCTS

TABLE 45 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE IN SINGLE USE, BY REGION, 2019–2026 (USD MILLION)

7.3 REUSE

7.3.1 SHIFT TOWARD SUSTAINABILITY DRIVING THE DEMAND FOR REUSE SHIPPERS

FIGURE 35 REVERSE LOGISTICS FOR REUSE SHIPPERS

TABLE 46 REUSE PASSIVE TEMPERATURE-CONTROLLED PACKAGING

TABLE 47 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE IN REUSE, BY REGION, 2019–2026 (USD MILLION)

8 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY REVENUE TYPE OF PASSIVE SYSTEM

8.1 INTRODUCTION

FIGURE 36 PRODUCTS ACCOUNTED FOR LARGER MARKET SHARE IN 2020 (BY VALUE)

TABLE 48 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE TYPE OF PASSIVE SYSTEM, 2019–2026 (USD MILLION)

8.2 PRODUCTS

8.2.1 THE GROWTH IN BIOPHARMA INDUSTRIES DRIVING THE USE OF TEMPERATURE-CONTROLLED PACKAGING PRODUCTS

TABLE 49 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE IN PRODUCTS SEGMENT, BY REGION, 2019–2026 (USD MILLION)

8.3 SERVICES

8.3.1 GROWTH IN RENTAL SOLUTIONS TO DRIVE THE SEGMENT DURING THE FORECAST PERIOD

TABLE 50 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET IN SERVICES SEGMENT, BY REGION, 2019–2026 (USD MILLION)

9 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY PRODUCT

9.1 INTRODUCTION

FIGURE 37 INSULATED SHIPPERS ACCOUNTED FOR THE LARGEST SHARE OF THE OVERALL MARKET IN 2020 (BY VALUE)

TABLE 51 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

9.2 INSULATED SHIPPERS

9.2.1 INCREASE IN CLINICAL TRIAL SHIPMENTS TO DRIVE THE MARKET FOR

INSULATED SHIPPERS

TABLE 52 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE IN INSULATED SHIPPERS, BY REGION, 2019–2026 (USD MILLION)

9.3 INSULATED CONTAINERS

9.3.1 DISTRIBUTION OF COVID-19 VACCINES DRIVING THE MARKET FOR INSULATED CONTAINERS

TABLE 53 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE IN INSULATED CONTAINERS, BY REGION, 2019–2026 (USD MILLION)

9.4 REFRIGERANTS

9.4.1 GROWING DEMAND FOR LOW-COST AND EFFICIENT PASSIVE SYSTEMS DRIVING THE DEMAND FOR ADVANCED PHASE CHANGE MATERIALS

TABLE 54 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE IN REFRIGERANTS, BY REGION, 2019–2026 (USD MILLION)

10 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY END-USE INDUSTRY

10.1 INTRODUCTION

FIGURE 38 PHARMA INDUSTRY ACCOUNTED FOR LARGER MARKET SHARE IN 2020 (BY VALUE)

TABLE 55 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

10.2 PHARMA

10.2.1 GROWTH IN PHARMACEUTICAL INDUSTRY TO DRIVE THE MARKET

TABLE 56 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE IN PHARMA, BY REGION, 2019–2026 (USD MILLION)

10.3 BIOPHARMA

10.3.1 INCREASE IN DEMAND FOR COVID-19 VACCINES TO DRIVE THE MARKET

TABLE 57 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE IN BIOPHARMA, BY REGION, 2019–2026 (USD MILLION)

11 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET, BY REGION

11.1 INTRODUCTION

FIGURE 39 REGIONAL SNAPSHOT: RAPIDLY GROWING MARKETS ARE EMERGING AS NEW HOTSPOTS

TABLE 58 TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET

SIZE, BY REGION, 2019–2026 (USD MILLION)

11.2 NORTH AMERICA

FIGURE 40 NORTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING MARKET SNAPSHOT

TABLE 59 NORTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 60 NORTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 61 NORTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, PASSIVE SYSTEMS BY USABILITY, 2019–2026 (USD MILLION)

TABLE 62 NORTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 63 NORTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 64 NORTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.2.1 US

11.2.1.1 Growing pharmaceutical market and distribution of vaccine in the country are major drivers

TABLE 65 US: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 66 US: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 67 US: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 68 US: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 69 US: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.2.2 CANADA

11.2.2.1 Presence of major pharmaceutical companies in the country with vaccine distribution will drive the market

TABLE 70 CANADA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 71 CANADA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 72 CANADA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS

MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 73 CANADA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 74 CANADA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.2.3 MEXICO

11.2.3.1 Growing pharmaceutical production in the country will be a key driver

TABLE 75 MEXICO: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 76 MEXICO: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 77 MEXICO: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 78 MEXICO: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 79 MEXICO: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.3 EUROPE

TABLE 80 EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 81 EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 82 EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 83 EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, PASSIVE SYSTEMS BY REVENUE TYPE, 2019–2026 (USD MILLION)

TABLE 84 EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 85 EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.3.1 GERMANY

11.3.1.1 Spike in clinical trials for COVID-19 vaccine to increase the demand for temperature-controlled packaging solutions

TABLE 86 GERMANY: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 87 GERMANY: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS

MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)
TABLE 88 GERMANY: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS
MARKET SIZE, PASSIVE SYSTEMS, BY REVENUE TYPE, 2019–2026 (USD
MILLION)

TABLE 89 GERMANY: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS
MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 90 GERMANY: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS
MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.3.2 SWITZERLAND

11.3.2.1 Increasing imports and exports for COVID-19-related supplies to boost the
demand for temperature-controlled packaging solutions

TABLE 91 SWITZERLAND: TEMPERATURE-CONTROLLED PACKAGING
SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 92 SWITZERLAND: TEMPERATURE-CONTROLLED PACKAGING
SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026
(USD MILLION)

TABLE 93 SWITZERLAND: TEMPERATURE-CONTROLLED PACKAGING
SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE,
2019–2026 (USD MILLION)

TABLE 94 SWITZERLAND: TEMPERATURE-CONTROLLED PACKAGING
SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 95 SWITZERLAND: TEMPERATURE-CONTROLLED PACKAGING
SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.3.3 FRANCE

11.3.3.1 Increasing imports and exports for COVID-19-related supplies along with
increasing clinical trials to boost product demand

TABLE 96 FRANCE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS
MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 97 FRANCE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS
MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 98 FRANCE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS
MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD
MILLION)

TABLE 99 FRANCE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS
MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 100 FRANCE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS
MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.3.4 ITALY

11.3.4.1 Increase in pharmaceutical exports to drive the demand

TABLE 101 ITALY: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 102 ITALY: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 103 ITALY: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 104 ITALY: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 105 ITALY: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.3.5 UK

11.3.5.1 Uncertainty in pharmaceutical industry due to Brexit

TABLE 106 UK: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 107 UK: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 108 UK: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 109 UK: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 110 UK: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.3.6 REST OF EUROPE

TABLE 111 REST OF EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 112 REST OF EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 113 REST OF EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 114 REST OF EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 115 REST OF EUROPE: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.4 APAC

FIGURE 41 APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SNAPSHOT

TABLE 116 APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 117 APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 118 APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 119 APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, PASSIVE SYSTEMS BY REVENUE TYPE, 2019–2026 (USD MILLION)

TABLE 120 APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 121 APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.4.1 CHINA

11.4.1.1 Spike in demand for pharmaceutical products owing to surge in clinical trials due to the outbreak of COVID-19 along with favorable conditions such as low cost of labor and raw materials

TABLE 122 CHINA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 123 CHINA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 124 CHINA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 125 CHINA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 126 CHINA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.4.2 JAPAN

11.4.2.1 Lowest growth rate in the region owing to tough environment for foreign players in the country

TABLE 127 JAPAN: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 128 JAPAN: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 129 JAPAN: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 130 JAPAN: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS

MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 131 JAPAN: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS

MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.4.3 SOUTH KOREA

11.4.3.1 Increasing approval to clinical trials over the past two decades boosted by the outbreak of COVID-19

TABLE 132 SOUTH KOREA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 133 SOUTH KOREA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY, 2019–2026 (USD MILLION)

TABLE 134 SOUTH KOREA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 135 SOUTH KOREA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 136 SOUTH KOREA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.4.4 INDIA

11.4.4.1 Favorable environment in the country owing to benefits such as cost-efficiency, economic drivers, policy support, and increasing investments

TABLE 137 INDIA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, PASSIVE SYSTEMS BY TYPE, 2019–2026 (USD MILLION)

TABLE 138 INDIA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY, 2019–2026 (USD MILLION)

TABLE 139 INDIA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 140 INDIA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 141 INDIA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.4.5 REST OF APAC

TABLE 142 REST OF APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 143 REST OF APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 144 REST OF APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE,

2019–2026 (USD MILLION)

TABLE 145 REST OF APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 146 REST OF APAC: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.5 MIDDLE EAST & AFRICA

TABLE 147 MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 148 MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 149 MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 150 MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 151 MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 152 MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.5.1 SAUDI ARABIA

11.5.1.1 High dependence of the pharmaceutical industry on imports to boost the demand

TABLE 153 SAUDI ARABIA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 154 SAUDI ARABIA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 155 SAUDI ARABIA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 156 SAUDI ARABIA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 157 SAUDI ARABIA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.5.2 SOUTH AFRICA

11.5.2.1 Increasing need for the development of temperature-controlled storage and transportation owing to the outbreak of COVID-19

TABLE 158 SOUTH AFRICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 159 SOUTH AFRICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 160 SOUTH AFRICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 161 SOUTH AFRICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 162 SOUTH AFRICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.5.3 REST OF MEA

TABLE 163 REST OF MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 164 REST OF MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 165 REST OF MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 166 REST OF MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 167 REST OF MEA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.6 SOUTH AMERICA

TABLE 168 SOUTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY COUNTRY, 2019–2026 (USD MILLION)

TABLE 169 SOUTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 170 SOUTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 171 SOUTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 172 SOUTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 173 SOUTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.6.1 BRAZIL

11.6.1.1 High dependence of pharmaceutical industry on imports to boost the demand

TABLE 174 BRAZIL: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 175 BRAZIL: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 176 BRAZIL: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 177 BRAZIL: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 178 BRAZIL: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.6.2 ARGENTINA

11.6.2.1 Imports of COVID-19 vaccines, mainly from China, Russia, and India, to boost the demand

TABLE 179 ARGENTINA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 180 ARGENTINA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 181 ARGENTINA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 182 ARGENTINA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 183 ARGENTINA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

11.6.3 REST OF SOUTH AMERICA

TABLE 184 REST OF SOUTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY TYPE, 2019–2026 (USD MILLION)

TABLE 185 REST OF SOUTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY USABILITY OF PASSIVE SYSTEMS, 2019–2026 (USD MILLION)

TABLE 186 REST OF SOUTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY REVENUE OF PASSIVE SYSTEMS TYPE, 2019–2026 (USD MILLION)

TABLE 187 REST OF SOUTH AMERICA: TEMPERATURE-CONTROLLED PACKAGING SOLUTIONS MARKET SIZE, BY PRODUCT, 2019–2026 (USD MILLION)

TABLE 188 REST OF SOUTH AMERICA: TEMPERATURE-CONTROLLED

PACKAGING SOLUTIONS MARKET SIZE, BY END-USE INDUSTRY, 2019–2026 (USD MILLION)

12 COMPETITIVE LANDSCAPE

12.1 OVERVIEW

FIGURE 42 COMPANIES MAINLY ADOPTED ORGANIC GROWTH STRATEGIES BETWEEN 2017 AND 2020

12.2 MARKET RANKING ANALYSIS

12.3 MARKET SHARE ANALYSIS

FIGURE 43 MARKET SHARE OF KEY PLAYERS, 2020 (BY VALUE)

12.4 MARKET EVALUATION FRAMEWORK

TABLE 189 MARKET EVALUATION FRAMEWORK

12.5 REVENUE ANALYSIS OF TOP PLAYERS

TABLE 190 REVENUE ANALYSIS OF KEY PLAYERS

12.6 COMPANY EVALUATION QUADRANT DEFINITION

12.6.1 STAR

12.6.2 EMERGING LEADER

12.6.3 PERVASIVE

12.6.4 PARTICIPANT

FIGURE 44 COMPANY EVALUATION QUADRANT, 2020

TABLE 191 COMPANY PRODUCT FOOTPRINT, BY PRODUCT

TABLE 192 COMPANY PRODUCT FOOTPRINT, BY TYPE

TABLE 193 COMPANY REGION FOOTPRINT

12.7 COMPETITIVE SCENARIO

12.7.1 EXPANSION

TABLE 194 EXPANSION, 2018–2020

12.7.2 NEW PRODUCT DEVELOPMENT

TABLE 195 NEW PRODUCT DEVELOPMENT, 2018–2020

12.7.3 DEALS

TABLE 196 DEALS, 2018–2021

12.7.4 JOINT VENTURE

TABLE 197 JOINT VENTURE, 2018–2021

12.7.5 COLLABORATION

TABLE 198 COLLABORATION, 2018–2021

13 COMPANY PROFILES

(Business overview, Products offered, Services offered, Impact of COVID-19 & MnM

View)*

13.1 SONOCO PRODUCTS COMPANY

FIGURE 45 SONOCO PRODUCTS COMPANY: COMPANY SNAPSHOT

TABLE 199 SONOCO PRODUCTS COMPANY: COMPANY OVERVIEW

TABLE 200 IMPACT OF COVID-19 ON SONOCO PRODUCTS COMPANY

13.2 COLD CHAIN TECHNOLOGIES, LLC

TABLE 201 COLD CHAIN TECHNOLOGIES, LLC: COMPANY OVERVIEW

13.3 VA-Q-TEC AG

FIGURE 46 VA-Q-TEC AG: COMPANY SNAPSHOT

TABLE 202 VA-Q-TEC AG: COMPANY OVERVIEW

TABLE 203 IMPACT OF COVID-19 ON VA-Q-TEC AG

13.4 PELICAN BIOTHERMAL LLC

TABLE 204 PELICAN BIOTHERMAL LLC: COMPANY OVERVIEW

13.5 SOFTBOX SYSTEMS

TABLE 205 SOFTBOX SYSTEMS: COMPANY OVERVIEW

13.6 SOFRIGAM SA

TABLE 206 SOFRIGAM SA: COMPANY OVERVIEW

13.7 DGP INTELSIUS GMBH

TABLE 207 DGP INTELSIUS GMBH: COMPANY OVERVIEW

13.8 INMARK, LLC

TABLE 208 INMARK, LLC: COMPANY OVERVIEW

13.9 FEDEX CORPORATION

FIGURE 47 FEDEX CORPORATION: COMPANY SNAPSHOT

TABLE 209 FEDEX CORPORATION: COMPANY OVERVIEW

TABLE 210 IMPACT OF COVID-19 ON FEDEX CORPORATION

13.10 UNITED PARCEL SERVICE, INC.

FIGURE 48 UNITED PARCEL SERVICE, INC.: COMPANY SNAPSHOT

TABLE 211 UNITED PARCEL SERVICE, INC.: COMPANY OVERVIEW

13.11 DEUTSCHE POST DHL GROUP

FIGURE 49 DEUTSCHE POST DHL GROUP: COMPANY SNAPSHOT

TABLE 212 DEUTSCHE POST DHL GROUP: COMPANY OVERVIEW

TABLE 213 IMPACT OF COVID-19 ON DEUTSCHE POST DHL GROUP

13.12 AMERISOURCEBERGEN CORPORATION

FIGURE 50 AMERISOURCEBERGEN CORPORATION: COMPANY SNAPSHOT

TABLE 214 AMERISOURCEBERGEN CORPORATION: COMPANY OVERVIEW

13.13 CARDINAL HEALTH, INC.

FIGURE 51 CARDINAL HEALTH, INC.: COMPANY SNAPSHOT

TABLE 215 CARDINAL HEALTH, INC.: COMPANY OVERVIEW

13.14 MCKESSON CORPORATION

FIGURE 52 MCKESSON CORPORATION: COMPANY SNAPSHOT

TABLE 216 MCKESSON CORPORATION: COMPANY OVERVIEW

13.15 ENVIROTAINER AB

TABLE 217 ENVIROTAINER AB: COMPANY OVERVIEW

*Details on Business overview, Products offered, Services offered, Impact of COVID-19 & MnM View might not be captured in case of unlisted companies.

13.16 OTHERS

13.16.1 CRYOPAK INDUSTRIES INC.

13.16.2 ECOCOOL GMBH

13.16.3 CRYOPORT, INC.

13.16.4 EXELTAINER SL

13.16.5 CSAFE GLOBAL, LLC

13.16.6 AMERICAN AEROGEL CORPORATION

13.16.7 INSULATED PRODUCTS CORPORATION

13.16.8 SEALED AIR CORPORATION

13.16.9 NORDIC COLD CHAIN SOLUTIONS

13.16.10 AERIS DYNAMICS PTE LTD

13.16.11 LIFOAM INDUSTRIES, LLC

14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGE STORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

14.3 AVAILABLE CUSTOMIZATIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

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