

Ampoules Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Ampoules Packaging Market size is estimated at USD 5.08 billion in 2024, and is expected to reach USD 7.17 billion by 2029, growing at a CAGR of 7.40% during the forecast period (2024-2029).

Key Highlights

Ampoules packaging is an essential procedure in manufacturing to protect the product from external contamination. Ampoules are unique because they seal and ensure an aseptic condition factor for the product packaging. The pharmaceutical industry has been using ampoules, especially glass, for a very long period as a primary packaging solution.

The demand for tamper-proof packaging for pharmaceutical packaging is growing, as tamper-proof packaging in pharmaceutical products ensures that the patient receives the drug in its original, safe, and effective form as it was manufactured in a sterile environment. The increasing demand for tamper-proof packaging has propelled growth. In reference to this, in March 2023, Schott invested around EUR 75 million (USD 81 million) over the last three years with an aim to expand its pharma glass production in India. The Gujarat-based facility emerges as the company's manufacturing hub for borosilicate glass tubing, a material converted to pharmaceutical containers, such as vials, ampoules, or syringes, to store life-saving drugs.

Additionally, glass is 100% recyclable, and the process does not compromise the quality. It means that most glass packaging never ends up in a landfill and can be reused many times without compromising the integrity of the new product. Glass

recycling reduces the carbon footprint. Recycling glass requires fewer raw materials and less energy compared to producing new glass, as it avoids the mining and refining processes. Moreover, the energy required to recycle existing glass products is less than that needed to melt the raw materials. It is eco-friendly and recyclable in nature, which is expected to boost the demand.

The advent of plastic ampoules in the market has helped ease some of the concerns related to glass fragments getting into the contents of the ampoules during breakage. Manufacturers of plastic ampoules will benefit from this, but regulatory changes and standards may impact them. Additionally, since the demand for ampoules from the pharmaceutical and life sciences end users significantly impacts their usage, the market remains inclined toward these end users for demand variations.

Ampoules Packaging Market Trends

Glass Ampoules are Expected to Hold a Significant Share in the Market

Glass is one of the primary packaging materials for the pharmaceutical and personal care industry, as it limits the alkalinity and hydrolytic resistance of glass ampoules. It offers high transparency, enabling easy inspection of their contents, and higher protection because they are relatively impermeable to air and moisture and chemically resistant to most medicinal products. Players such as Schott launched the production of amber pharma glass in India to meet the increasing demand for pharmaceutical containers, such as ampoules, syringes or vials, and other drugs in Asia, in March 2023.

Ampoules play a significant role in parenteral packaging. The growing geriatric population, increasing prevalence of chronic diseases, and rising preference for injection-based treatments drive the global demand for parenteral packaging. Further, players operating in the glass ampoules market are launching high-speed filling lines to improve the functionalities of glass ampoules with highly stable dimensional qualities, increasing their manufacturing capabilities. Further, Nipro Pharma Packaging has pledged to invest substantially in a capacity extension in India in the coming three years. The first expansion will produce additional glass tubing quantities for the Indian and global markets.

The rapidly growing pharmaceutical industry worldwide is driving the market's growth. The demand for pharmaceutical glass ampoules is emerging from densely populated economies such as India, Brazil, and China. Increasing medication production to offer patients greater comfort and autonomy in treating chronic inflammatory diseases

propels the market's growth.

For instance, in January 2023, South Korean biopharmaceutical company Celltrion Healthcare, specializing in the development and production of biosimilars and new molecules, won a tender to supply the Ministry of Health in Brazil, with infliximab, used for the treatment of 8 autoimmune diseases, including Rheumatoid Arthritis (RA) and Inflammatory Bowel Disease (IBD). As per the contract, Celltrion Healthcare intends to supply 342,000 ampoules to Brazil. The players collaborate in their efforts, enabling domestic drug makers to meet the rising demand for critical medicines globally. Players such as SGD Pharma and Corning Life Sciences have collaborated to support their continued global expansion as the companies localize manufacturing for their customers.

Glass ampoules are extensively used in the pharmaceutical industry for packaging vaccines and injectable medications due to their airtight and tamper-evident properties, ensuring the sterility and integrity of the contents. The market's growth is supported by vaccination for diseases such as Hepatitis B, tuberculosis, Chicken Pox, and Polio, which require proper vaccine storage. Beyond pharmaceuticals, glass ampoules are also used in the cosmetics and chemical industries to package high-purity substances and sensitive formulations.

Asia-Pacific is Expected to Show a Significant Growth in the Long Term

The growth of the Chinese pharmaceutical sector is expected to create growth opportunities for ampoules in the country. Chinese pharmaceutical packaging companies are encouraged to develop independent research and development teams to explore innovative, environmentally friendly, safe, functional, and sustainable packaging materials and products. The growing innovation, collaboration, acquisition, and production in drug manufacturing have boosted the market growth.

Schott, a Germany-based specialty glass manufacturer, recently opened its first pharma glass tubing factory in Jinyun County, Zhejiang province, China. The company invested another EUR 70 million (USD 80.8 million) to expand its melting infrastructure, including additional melting tanks in Jinyun, to meet the rising demand for high-quality glass tubing for primary pharmaceutical packaging. The new tanks were operational in 2023.

Increasing demand for skin care products is expected to boost the market's growth.

Domestic and foreign brands invest in developing products with anti-aging, antioxidants, anti-inflammatory, hydration, brightening collagen boosters with retinol, and de-puffing properties that deliver rapid results. Furthermore, the category of anti-aging cosmetics in the region will include creams, serums, ampoules, and eye creams.

Moreover, according to the National Bureau of Statistics of China, the retail sales of cosmetics by wholesale and retail companies in China totaled about USD 58.53 billion in 2023 from USD 43.30 billion in 2019. Ampoules in cosmetics provide highly concentrated, targeted skincare treatments that address concerns like hydration, anti-aging, or brightening. The growth in retail sales of cosmetics products in China can positively impact the demand for ampoules in the coming years.

Ampoules Packaging Industry Overview

The ampoules packaging market is fragmented. The surge in government initiatives and increasing demand for injectables and other medicines provide lucrative opportunities in the ampoules packaging market. Overall, the competitive rivalry among existing competitors is high. Expansion and mergers of large companies in different pharmaceutical industries are expected to increase the demand for ampoule packaging. Key players in the market are Schott AG, Amposan SA, and Gerresheimer AG.

December 2023 - SCHOTT Pharma announced plans to expand its global manufacturing network and decided to invest a double-digit million Euro amount in a new production site for pharmaceutical drug containment solutions and delivery systems in Jagodina in central Serbia. The ramp-up for the manufacturing of ampoules for the pharmaceutical industry is expected to start in 2024.

September 2023 - Ormaie, a young French fragrance brand, decided to use only 100% natural ingredients in its fragrances and launched a collection of small-size refillable bottles using a glass ampoule. Ormaie's collection of nine perfumes is available in refillable 20ml formats, perfect for use at home or on the go. Ormaie has come up with an innovative solution for a refillable system that's both stylish and eco-friendly. Instead of traditional refillable systems, Ormaie now offers refillable glass ampoules that are the same size and filled with perfumes.

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