

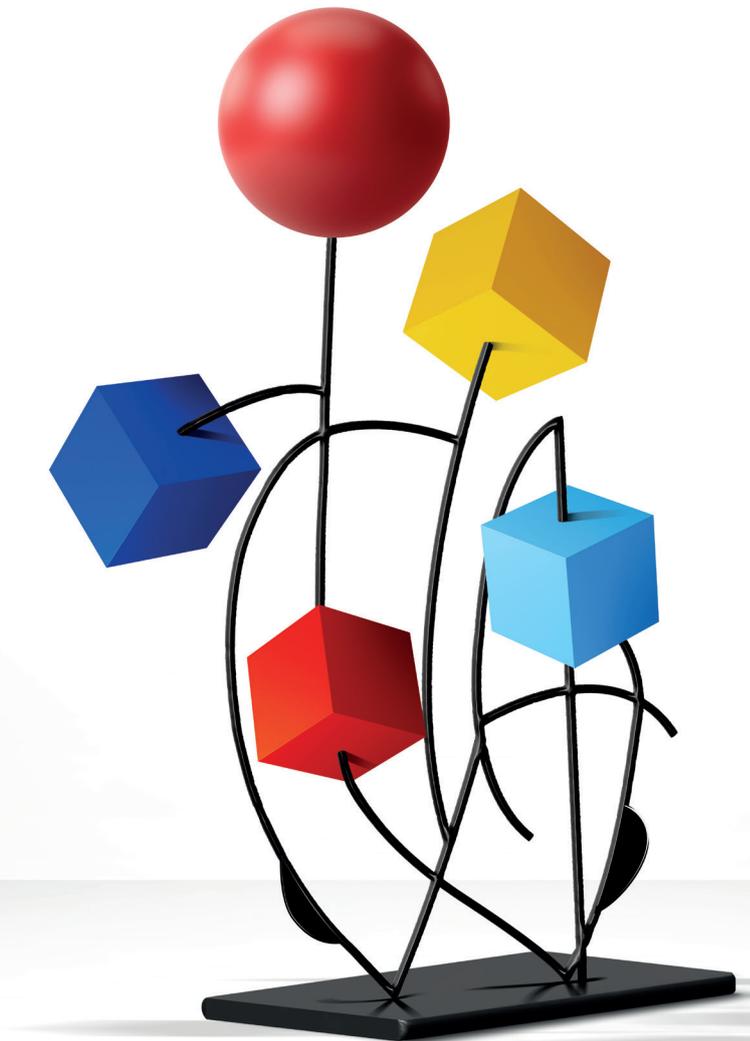
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PHARMA & CHEMICALS

Packaging Materials

October 2024



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174.8 bln. ton.
Production volume 2023

+3.6%
CAGR 2023 - 2026

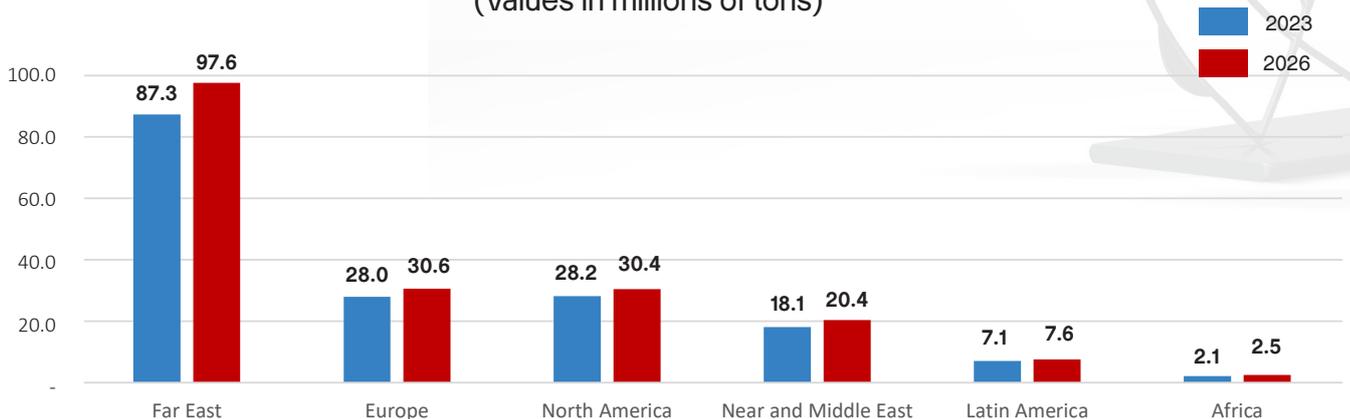
194.2 bln. ton.
Production volume 2026

Among the most widely used materials for packaging finished goods, **plastic** stands out, **worth 174.8 million tons in volume terms in 2023**. Looking ahead, by 2026, the value will reach 194.2 million tons, thanks to an **average annual growth rate (CAGR 2023 - 2026) of +3.6%**.

The **world's first region** for plastic packaging production is **Far East** with **87.3 million tons of production in 2023** (97.6 million tons in 2026), in second place **North America** with **28.2 million tons** (prospectively, it will be 30.4 million tons in 2026). This is followed in third place by **Europe** with **27.9 million tons in 2023** and 30.6 million projected for 2026. In fourth place is the **Near and Middle East** (it was **18.1 million tons in 2023** and 20.4 million projected for 2026). Fifth is **Central and South America** with **7.1 million tons in 2023** and an expected volume by 2026 of 7.6 million. The last two regions by production volume are **Africa** (**2.1 million tons in 2023**) and **Oceania** (in 2023; **269.0 thousand tons**) with 2.5 million and 281 thousand tons of plastic packaging production in 2026, respectively.

Worldwide production of plastic material for Packaging

2023 and 2026 volume comparison by region
(values in millions of tons)

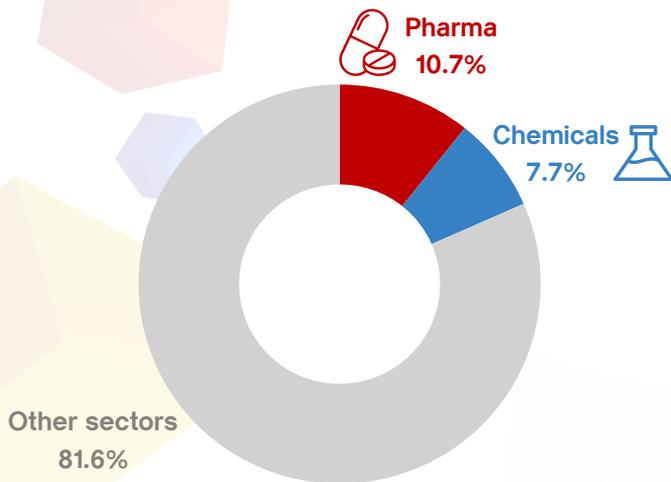


To date, the packaging of goods is essential in the everyday life of everyone and in all sectors covered by Packaging, first and foremost that of consumer goods. **The Pharmaceutical and Chemical sectors account for 18.4%** of the packaging sector (10.7% is the share of pharmaceutical goods, 7.7% that of chemical products).

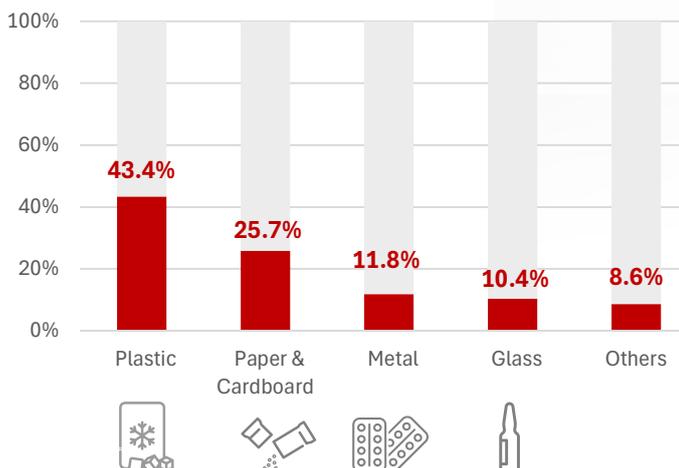
Looking at the data emerging from the analysis of the **materials used for the packaging of Chemicals products**, a majority share of **plastic packaging** is evident (worth **33.2%** of the total in the chemical sector). **Paper and Cardboard packaging** (mostly used for secondary and end-of-line packaging) is worth a total of **20.3%** of the total in the Chemicals sector. In contrast, **glass packaging** is worth 13.4% and metal packaging **11.4%**.

Pharmaceuticals are also packaged mostly in **plastic** (43.4% of the total), followed by total value **Paper and Cardboard** with **25.7%** of packaging, **Metal** and **Glass** with **11.8%** and **10.4%** of total pharmaceutical packaging, respectively.

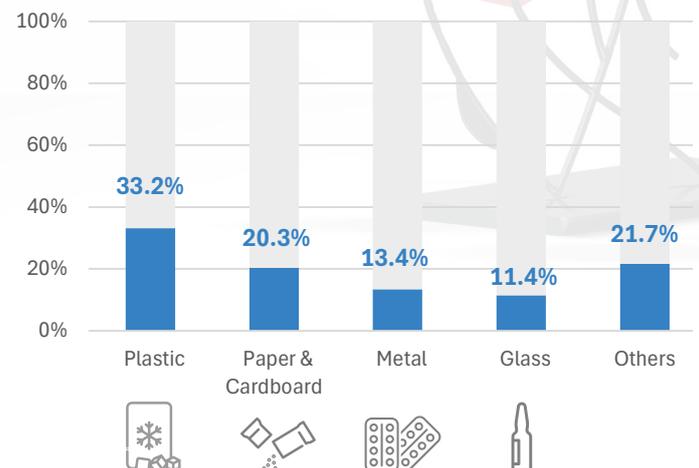
Packaging Materials Pharma and Chemicals Shares



Pharma Material types



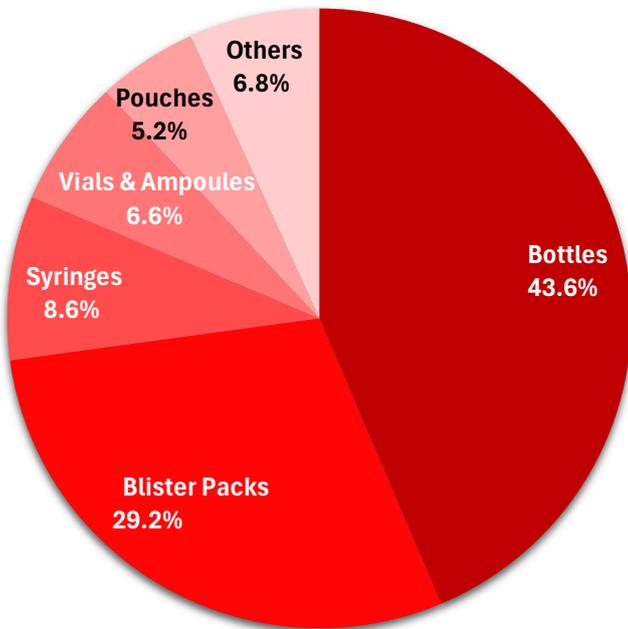
Chemicals Material types



The pharmaceutical sector, for intrinsic industry factors, in addition to the more traditional bottles, sachets and vials, also requires sophisticated packaging formats ranging from vials and ampoules to syringes and blisters.

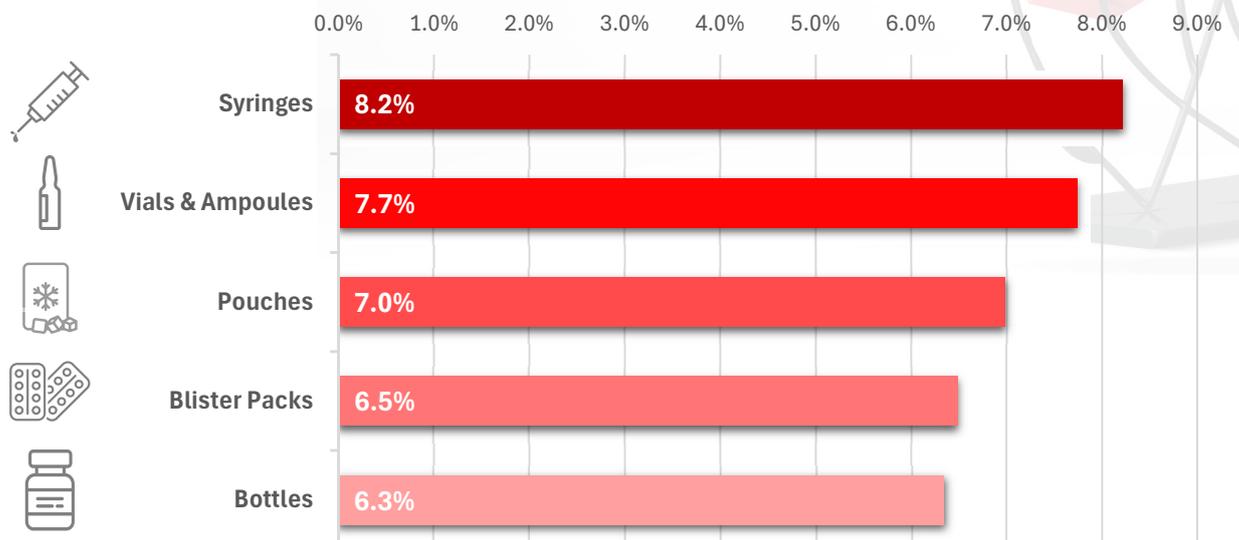
The most common format for storing pharmaceutical products are **bottles and jars**, used for **34.1%** of products. Also very common are **blister packs** that typically store tablets (used for **22.8%** of products). **Syringes** are worth **6.7%** of the market, **Vials and Ampoules** store **5.2%** of products while **pouches** are used for **4.1%** of the total.

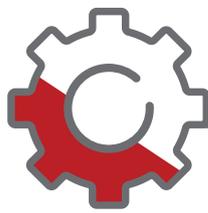
Pharmaceutical Packaging Shares of packaging formats



Consistent with the pharmaceutical goods market, the packaging materials market in the same sector will also grow rapidly by 2026. The fastest growing packaging format is for **Syringes** (+8.2% each year until 2026). **Vials and Ampoules** are also expected to grow significantly, in terms of **CAGR 2023 - 2026**, at +7.7% per year. Third in the ranking in terms of expected growth is the value of **Pouches** (+7.0% each year for the next three years). Last in the ranking are **Blisters** and **Bottles** in growth of +6.5% and +6.3% respectively by 2026.

Pharmaceutical Packaging Expected growth (CAGR 2023 - 2026) of different packaging formats





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