



# China Pharmaceutical Packaging Industry Report, 2016-2021

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## **STUDY GOAL AND OBJECTIVES**

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## **REPORT OBJECTIVES**

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## **METHODOLOGY**

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## **INFORMATION SOURCES**

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Under the impetus of the fast-growing downstream pharmaceutical industry, Chinese pharmaceutical packaging market size increased year by year at the CAGR of 11.2% during 2010-2016. From 2017 to 2021, the market size will maintain the growth rate of about 10% and is expected to outnumber RMB140 billion in 2021, thanks to severe aging, the released two-child policy, the rapid development of biological agents and supporting policies.

At present, Chinese pharmaceutical packaging market mainly characterizes the following:

### **First, the market concentration gradually improves**

More than 1,500 Chinese pharmaceutical packaging enterprises are mostly small and scattered, so the market needs integrating at once. Driven by the Guidance on Speeding up Corporate Mergers and Acquisitions of Key Industries and other policies, China pharmaceutical packaging industry has witnessed frequent mergers and acquisitions in recent years, for instance, Fengyuan Pharmaceutical acquired Chengdu PUSH Pharmaceutical, China Jianyin Investment Ltd (JIC) took over SGD, Chienyeh Pharmaceutical Packaging bought Nanchong Sanying Medicinal Packaging Material Co., Ltd. In this case, the concentration of Chinese pharmaceutical packaging market has been raised progressively.

### **Second, local enterprises develop towards high end**

At present, Chinese high-end pharmaceutical packaging market is mainly occupied by BD, Gerresheimer, SCHOTT, Nipro, Amcor and other multinational companies, while the medium and low-end market is dominated by local firms. In recent years, higher pharmaceutical packaging standards propel local enterprises to intensify R & D, so they will gradually transfer to the high-end market in future.

### **Third, new-type pharmaceutical packaging materials emerge**

In recent years, China has introduced the standard system of the pharmaceutical industry, and attaches more importance to pharmaceutical packaging materials which affect storage stability and use safety of drugs. Naturally, new-type, environmentally friendly, biodegradable and convenient pharmaceutical packaging materials and containers have emerged.

### **Fourth, neutral borosilicate pharmaceutical glass realizes localization**

Neutral borosilicate pharmaceutical glass is the universally acknowledged best pharmaceutical packaging material. China has been dependent on imports of such material over the years. In order to achieve import substitution, China has issued "Twelfth Five-year Plan" for Pharmaceutical Industry and other policies, which stimulated the accomplished mass-production of Cangzhou Four Stars Glass Co., Ltd, North China Pharmaceutical Co., Ltd. and other enterprises as well as the ongoing projects of Shandong Pharmaceutical Glass, Linuo Glassworks and the like in the field of neutral borosilicate pharmaceutical glass.

China Pharmaceutical Packaging Industry Report 2016-2021 highlights the following:

- ◆ Status quo, market size, competitive landscape, import & export, market segments, downstream demand and development forecast of China pharmaceutical packaging industry;
- ◆ Operation, pharmaceutical packaging business and development in China of 4 foreign companies;
- ◆ Operation, pharmaceutical packaging business and development prospects of 8 Chinese companies.



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