



**China Pharmaceutical Packaging Industry
Report, 2019-2025**

May 2019

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

Being incentivized by the burgeoning pharmaceuticals industry, Chinese pharmaceutical packaging market size sustained growth rates of around 10% in recent years, and outstripped RMB100 billion in 2018, up to RMB107.4 billion, and it will be at least RMB200 billion in 2025 under the impetus of population aging, two-child policy, the boom of biological agents and related favorable policies.

In China, the high-end pharmaceutical packaging market is currently carved up by multinational corporations, typically BD, Gerresheimer, SCHOTT, Nipro and Amcor; Chinese companies just focus on low- and mid-end markets, but they tend to move toward the high-end by lavishing more on research and development as pharmaceutical packaging standards grow stricter.

A total of over 1,500 Chinese pharmaceutical packaging companies fall into three kinds: a handful of pharmaceutical giants that concentrate on independent production, like Sichuan Kelun Pharmaceutical Co., Ltd.; players which not only work on pharmaceutical packaging but have offerings for food, healthcare products and consumer goods packaging, such as Shandong Linuo Technical Glass Co., Ltd., Heilongjiang Tongyu Pharmaceutical Packaging Co., Ltd. and Shanghai Haishun New Pharmaceutical Packaging Co., Ltd.; and those committing themselves to the R&D, production and sales of pharmaceutical packaging materials, for instance, Shandong Pharmaceutical Glass Co., Ltd., Guizhou Chienyeh Pharmaceutical Packaging Co., Ltd., Shanxi Hongguang Medicine Packaging Co., Ltd. and Hebei First Rubbebr Medical Technology Co., Ltd.. In the lowly concentrated pharmaceutical packaging market of China, even the pharmaceutical glass bellwether Shandong Pharmaceutical Glass Co., Ltd. takes a tiny share of 2.4% in 2018.

Classification of Chinese Pharmaceutical Packaging Materials Producers

Type	Typical Companies	Characteristics
Pharmaceutical giants	Sichuan Kelun Pharmaceutical Co., Ltd., Yunnan Baiyao Group Co., Ltd.	Independently produce some pharmaceutical packaging materials by close relation between medicines and pharmaceutical packaging
Companies specializing in production of pharmaceutical packaging materials	Shandong Pharmaceutical Glass Co., Ltd., Guizhou Chienyeh Pharmaceutical Packaging Co., Ltd., Shanxi Hongguang Medicine Packaging Co., Ltd., Hebei First Rubbebr Medical Technology Co., Ltd., Cangzhou Four Stars Glass Co., Ltd.	Devoted to research and development, production and sales of pharmaceutical packaging materials
Companies operating packaging materials for both pharmaceuticals and other products	Shandong Linuo Technical Glass Co., Ltd., Heilongjiang Tongyu Pharmaceutical Packaging Co., Ltd., Shanghai Haishun New Pharmaceutical Packaging Co., Ltd.	Mainly operate pharmaceutical packaging materials, and also have offerings for other non-pharmaceutical products

Source: ResearchInChina

China's pharmaceutical packaging industry holds the following trends:

1. New types of pharmaceutical packaging materials emerge.

China has built a standard system for pharmaceuticals industry over the years. The country pays more and more attention to the stability of pharmaceutical packaging materials during the drug storage period, and safety when used. Under this background, new types of green, degradable and easy-to-use pharmaceutical packaging materials and vessels are in the palmy days.

2. The industry is becoming more concentrated.

Mergers and acquisitions among pharmaceutical packaging companies occurred frequently in recent years, thanks to favorable policies like the Guidance on Accelerating the Merger and Reorganization of Enterprises in Key Industries. For instance, Shandong Pharmaceutical Glass Co., Ltd. acquired Sichuan Mianzhu Chengxin Pharmaceutical Glass Co. Ltd.; Anhui BBCA Pharmaceutical Co., Ltd. acquired Chengdu PUSH Pharmaceutical Co., Ltd.; China Jianyin Investment Ltd. (JIC) acquired SGD Pharma; and Guizhou Chienyeh Pharmaceutical Packaging Co., Ltd. acquired Nanchong Sanying Medicinal Packaging Material Co., Ltd., Accordingly, Chinese pharmaceutical packaging market is increasingly concentrated.

3. Neutral borosilicate products substitute for low borosilicate products.

As people lead a better life, they require better quality of pharmaceutical packaging materials. A growing number of companies have applied international standard-based neutral borosilicate glass. Several companies including Shandong Pharmaceutical Glass Co., Ltd., Chongqing Zhengchuan Glass Co., Ltd., Cangzhou Four Stars Glass Co., Ltd., Anhui Huaxin Medicinal Glass Products Co., Ltd., Baoji Tongli Pharmaceutical Glass Co., Ltd. and Ningbo Zhengli Pharmaceutical Packing Co., Ltd. have been approved to roll out their neutral borosilicate glass products. Driven by companies that have passed consistency evaluation, neutral borosilicate products will become an alternative to low borosilicate products in China. The injection packaging materials field alone will see RMB3 billion to RMB9 billion be replaced.

China Pharmaceutical Packaging Industry Report, 2019-2025 highlights the following:

China pharmaceutical packaging industry (development status, market size, competitive pattern, import & export, market segments, downstream demand, and development trend);

4 foreign companies (operation, pharmaceutical packaging business, and development in China);

16 Chinese companies (operation, pharmaceutical packaging business, and forecast).

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