Temperature Controlled Packaging Solutions Market: Global Industry Analysis and Opportunity Assessment, 2016-2026

Description: Healthcare segment will lead the global temperature controlled packaging solutions market during the assessment period

Our analysis of the global temperature controlled packaging solutions market indicates a robust growth in the healthcare end use segment. By value, the healthcare end use segment is expected to expand at a higher CAGR as compared to the Food & Beverages and Others end use segments during the period of forecast (2016 - 2026). On the basis of market share, the healthcare sector is anticipated to present an incremental opportunity that is higher by US$ 165 Mn compared to the food & beverages segment during 2016-2026.

Our report also indicates that the healthcare segment is likely to be valued more than US$ 2 Bn by 2016 end, accounting for approximately 40% of the total revenues of the global temperature controlled packaging solutions market. The segment is anticipated to gain more than 300 basis points between 2016 and 2026, expanding at a CAGR of more than 10% during the projected period.

Factors driving growth and revenue of the healthcare segment of the global temperature controlled packaging solutions market

International organizations such as World Health Organization (WHO) are continuously focussing on reducing wastage of vaccines across the globe. As a part of this, various programs are initiated to monitor vaccine wastage at country levels. These programs also focus on proper handling and transportation of vaccines. This particular factor surges the demand for temperature controlled packaging in the healthcare sector. Another factor that is creating a positive impact on the market is an unprecedented shift towards structurally-complex biotechnology drugs over chemical-based drugs.

Drugs used in the treatment of cancer or cold chain drugs such as insulin require constant temperature control. These specified drugs are fuelling the demand for temperature controlled packaging solutions, which is ultimately boosting the global temperature controlled packaging solutions market.

As patents on prominent biologics expire by 2022, leading pharmacy manufacturers are anticipated to flood the market with variegated biopharma and biosimilars, further driving the need for temperature controlled packaging solutions.

Several regulations regarding handling and distribution of pharmaceutical products are being implemented in various regions in North America and Europe to harmonise manufacturing, processing and distribution of temperature sensitive pharmaceutical products. This in turn is creating a favourable environment for temperature controlled packaging solution services.

Transportation of temperature-sensitive products using passive systems such as temperature controlled packaging provides flexibility of transportation and ease of handling, thus reducing damage during transportation.

Sluggish growth of the global temperature controlled packaging solutions market in the Japanese healthcare sector

Sluggish growth in the Japanese pharmaceutical sector owing to a moderate economic growth, falling drug prices, and pro-generics policies is projected to keep the global temperature controlled packaging solutions market in the region highly cost sensitive; therefore companies in this region should introduce more cost-effective solutions addressing the Ambient/CRT and frozen applications segments. The recent shift in clinical trials from developed countries to Brazil, Argentina, and Peru is further expected to create good market opportunities for temperature controlled packaging solution providers. Increasing regulations regarding temperature assured packaging of most pharmaceutical products in Western Europe is helping maintain continuous growth in the region and revenues in the region are anticipated to expand with a CAGR of more than 8% over the forecast period.
America's Sonoco Products holds the largest share in the global temperature controlled packaging solutions market.

Among the insulated shipper specialist manufacturers, Sonoco Products and Pelican Biothermal together hold more than 55% share in the global temperature controlled packaging solutions market. While among the insulated containers/bins manufacturers, Sonoco Products accounts for more than 25% share in the global temperature controlled packaging solutions market.

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