



Solubility Enhancement in Pharmaceutical Oral Solid Dosage Forms: Global Market Analysis and Opportunities

Published March 2015

Base Year: 2014

Forecasts to 2019

Regional Coverage: Global

The pharmaceutical industry is facing a major challenge with drug solubility as more than 80% of the entire drug candidates in the R&D pipeline are reported to be poorly soluble in water. This leads to serious problems for the efficiency of pharmaceutical doses and notably in the OSDF segment. At the same time, it is creating a sustainably growing market opportunity for solubilization technologies in general and for excipients used for solubility enhancement in particular.

This Report Will Help Answer the Following Questions:

- What are the competing technologies for solubility enhancement and what is their current use?
- What are the pros and cons of each technology available?
- What are the sales of excipients for solubility enhancement by regions?
- Which suppliers are active on the market, which products are they supplying, and what are their relative market shares?
- What is the average price of various excipients for solubility enhancement?
- How is the technological landscape expected to evolve?
- What is the forecast consumption of excipients for solubility enhancement from 2014 to 2019?



Report Contents

Introduction

Executive Summary

Introduction to Solubility Enhancement

- Global pharmaceutical industry: overview
- Regulatory overview
- Current situation of poorly bioavailable active ingredients

Solubility Enhancement Technologies

- Particle size reduction
- Modification of crystal habit
- Chemical modification
- Complexation with cyclodextrins
- Micellar solubilization using surfactants
- Solid dispersions
- Spray drying
- Hot-melt extrusion
- Lyophilization

- Lipid solubilization
- Self-emulsifying drug delivery system
- Other technologies
- Upcoming technologies
- Comparative assessment of solubility enhancement technologies

For each technology covered in this chapter, the following information is provided:

- Technologies available
- Pros and cons
- Use of excipients
- Outlook

Solubility Enhancement Excipients

Competitive Landscape

Appraisal and Outlook



Table 1: Products Covered

Cyclodextrins
Polyethylene Glycol (PEG)
Polyvinylpyrrolidone (PVP)
Polyvinyl alcohol (PVA)
Crospovidone
Poloxamers
Cellulose derivatives (HPMC, HPC, and CMEC)
Lipids and surfactants used in softgels

NOTE: This is a tentative scope, any excipients with significant consumption for solubility enhancement will be covered.



Scope

This report provides a detailed independent appraisal of the analysis including current and forecast demand by major products, supplier sales, and technical and market trends and explores market opportunities and challenges for manufacturers of these excipients worldwide.

- Consumption of polymers at the global and regional level and forecasts to 2018
- Consumption by polymer types
- Demand of polymers in all major regions encompassing Asia, North America, Europe, and Rest of World
- Detailed analysis of key drivers and restraints at global and regional level of the polymer consumption
- Competitive landscape of the polymer for solubility enhancement industry

Key Benefits

This report assists suppliers of excipients in identifying opportunities within the global market of solubility enhancers. It also serves as an invaluable tool in the strategic planning process.

- Develop business strategies by understanding the trends and developments that are driving the global solubility enhancement excipients market
- Identify key growth drivers by product type, application, and geography to enable development of targeted sales and marketing strategies to exploit high growth areas
- Develop market-entry and market expansion strategies
- Identify the competition from alternative technologies
- Competitive intelligence for use in benchmarking
- Forecasting scenarios from which to base solid strategic business plans



Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Distributors
- Government agencies
- Marketers/manufacturers
- Retailers
- Suppliers
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence procurement and assessment, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

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