



Specialty Excipients for Oral Solid-Dosage-Form Pharmaceuticals Global Series: Market Analysis and Opportunities

Published July 2017

Base Year: 2016

Forecasts to 2021

Regional Coverage: China ■ CIS ■ Europe ■ India ■ Japan ■ United States

Currently, a few regions represent the bulk of the global pharmaceutical manufacturing, and therefore the largest potential for excipients manufacturers. In the meantime, and regardless of the development of biologicals, oral solid-dosage-forms still represent almost half of the pharmaceutical excipients market's potential globally. This new series of regional reports aims at giving advanced business intelligence on all the key OSDF excipients globally including the large European, U.S., and Japanese markets, as well as key "pharmerging" markets represented by India, China, and the Commonwealth of Independent States (CIS).

This Report Helps Subscribers to Answer Key Questions Such as:

- What are the sales of specialty excipients in each region?
- Which suppliers are active in the market, and which excipients are they supplying?
- What are the differences in consumption patterns between mature and pharmerging markets?
- Is inter-product competition happening in the market and what excipients are favored?
- How are current formulation changes (low solubility APIs, biological, etc.) affecting the market of OSDF excipients?
- What are the average prices of various specialty excipients by region?
- What is the forecast consumption from 2016 to 2021?

Report and Database Contents

Specialty Excipients for Oral Solid-Dosage-Form Pharmaceuticals Global Series comes as a concise report per region and includes a fully interactive database. While the dataset allows users to customize views according to supplier, excipient category, and excipient, the reports provide subscribers with enlightening explanations on the database figures, forecasts models, and market drivers.

Concise Reports Content: (one report per region)

Introduction

Pharmaceutical Industry and Regulatory

Overview

- Regional market for pharmaceutical products
- Technology trends
- Regulatory overview

Specialty Binders and Fillers

- Introduction
- Products
- Estimated consumption
- Direct compression vs. wet granulation
- Industry structure
- Competitive landscape
- Appraisal and outlook

Disintegrants

- Introduction
- Products
- Estimated consumption
- Industry structure
- Competitive landscape
- Appraisal and outlook

Lubricants

- Introduction
- Products
- Estimated consumption
- Industry structure
- Competitive landscape
- Appraisal and outlook

Matrix formers

- Introduction
- Products
- Estimated consumption
- Industry Structure
- Competitive Landscape
- Appraisal and Outlook

Coatings

- Introduction
- Products
- Estimated consumption by products
- Estimated consumption by function
- Industry structure
- Competitive landscape
- Appraisal and outlook

Table 1: Historical Regional Data Available

Region	Historic data	Base year	Forecast
United States	2007, 2010, 2012	2016	2017-2021
Europe	2007, 2010, 2012	2016	2017-2021
India	2007, 2010, 2012	2016	2017-2021
China	2007, 2010, 2012	2016	2017-2021
Japan	-	2016	2017-2021
CIS	-	2016	2017-2021
Middle East	2015	-	2016-2020
Africa	2015	-	2016-2020
Southeast Asia	2015	-	2016-2020
Brazil	2015	-	2016-2020

NOTE: Kline's fully interactive database allows the user to compare cross-regions figures for a selected year based on forecasts.



Scope

Specialty Excipients for Oral Solid-Dosage-Form Pharmaceuticals: Global Series provides a detailed independent appraisal of the complex excipients markets in key consuming regions. It explores market opportunities and challenges for manufacturers of specialty excipients.

The results of the study are presented in two complementary tools: an interactive database and concise reports for each region considered.

Database data includes:

- Consumption in volume and value for each of the excipients considered
- Split by region/country
- Split by excipient categories
- Split by suppliers
- Forecast consumption by excipients (2014-2019)

Excipients coverage includes over 25 specialty excipients (Table 2).

Table 1: Product Segmentation

<p>SPECIALTY BINDERS AND FILLERS</p> <p><i>Alginates</i></p> <p><i>Cellulosics</i></p> <ul style="list-style-type: none"> ■ Carboxymethyl sodium ■ Ethyl cellulose ■ Hydroxypropyl cellulose ■ Hydroxypropyl methyl cellulose ■ Methylcellulose ■ Microcrystalline cellulose <p><i>Dicalcium phosphate</i></p> <p><i>Directly compressible sucrose</i></p> <p><i>Lactose</i></p> <p><i>Polyols</i></p> <ul style="list-style-type: none"> ■ Mannitol ■ Sorbitol <p><i>Starch</i></p> <p><i>Xanthan gum</i></p> <p>DISINTEGRANTS</p> <p><i>Crospovidone</i></p> <p><i>Croscarmellose sodium</i></p> <p><i>Sodium starch glycolate</i></p>	<p>MATRIX FORMERS</p> <p><i>Alginates</i></p> <p><i>Cellulosics</i></p> <ul style="list-style-type: none"> ■ Carboxymethyl sodium ■ Ethyl cellulose ■ Hydroxyethyl cellulose ■ Hydroxypropyl cellulose ■ Hydroxypropyl methyl cellulose <p><i>Polyethylene oxide</i></p> <p><i>Xanthan gum</i></p> <p>LUBRICANTS</p> <p><i>Magnesium stearate</i></p> <p>COATINGS</p> <p><i>Polymers/film formers</i></p> <p><i>Formulated color coatings</i></p>
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Key Benefits

This report assists excipients suppliers in identifying opportunities within key growth area for specialty excipients. It also serves as an invaluable tool in the strategic planning process.

- Develop business strategies by understanding the trends that are driving the consumption of specialty excipients in all regions covered
- Design your regional marketing and sales strategies
- Develop market-entry and market expansion strategies
- Benchmark different geographies by historic and forecast growth of the specialty excipients market
- Capitalize by identifying specific excipients or excipient categories poised for strong growth



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:

- Marketers/manufacturers
- Distributors
- Government agencies
- 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

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

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