



Specialty Excipients for Oral Solid-Dosage-Form Pharmaceuticals:

Emerging Markets Analysis and Opportunities

Published September 2015

Base Year: 2014

Forecasts to 2019

Regional Coverage: Brazil ■ The Middle East and Africa ■ Southeast Asia

While the global market of specialty excipients for oral solid-dosage-form (OSDF) pharmaceuticals is dominated by China, Europe, India, and the United States, other regions can represent large growth areas for excipients suppliers. Expansion of medicines access in Southeast Asia, spending growth in the Middle East, large untapped potential in Africa, and rapid growth of the generic sector in Brazil are just a few of the strong market drivers these regions are benefiting from.

Complementing the reports published in 2014 about the Chinese, European, Indian, and U.S. markets, Specialty Excipients for Oral Solid-Dosage-Form Pharmaceuticals: Emerging Markets Analysis and Opportunities is an indispensable tool for excipients suppliers to understand key emerging markets globally and take advantage of their growth potential.

This Report Helps Subscribers 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?
- Is inter-product competition happening in the market, and what excipients are favored?
- What are the average prices of various specialty excipients by region?
- What is the forecast consumption from 2014 to 2019?



Report and Database Contents

Specialty Excipients for Oral Solid-Dosage-Form Pharmaceuticals: Emerging Markets Analysis and Opportunities comes as a concise report per region and includes a fully interactive database.

While the database 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:

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

Coatings

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





Scope

Specialty Excipients for Oral Solid-Dosage-Form Pharmaceuticals: Emerging Markets Analysis and Opportunities provides a detailed independent appraisal of the complex excipients markets in fast-moving regions that are the Middle East and Africa, and Southeast Asia. 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 1).

Table 1: Product Segmentation

SPECIALTY BINDERS AND FILLERS

Alginates

Cellulosics

- Carboxymethyl sodium
- Ethyl cellulose
- Hydroxypropyl cellulose
- Hydroxypropyl methyl cellulose
- Methylcellulose
- Microcrystalline cellulose

Dicalcium phosphate

Directly compressible sucrose

Lactose

Polyols

- Mannitol
- Sorbitol

Starch

Xanthan gum

DISINTEGRANTS

Crospovidone

Croscarmellose sodium

Sodium starch glycolate

LUBRICANTS

Magnesium stearate

COATINGS

Polymers/film formers

Formulated color coatings

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 the Middle East and Africa, and Southeast Asia
- Design your regional marketing and sales strategies
- Identify key companies best positioned to take advantage of emerging market opportunities
- Benchmark different geographies by historic and forecast growth of the specialty excipients market
- Capitalize by identifying specific excipients or excipients category 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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