



1st Edition

# Excipients for Topical Pharmaceuticals: Market Analysis and Opportunities

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Base Year: 2018

Forecasts to 2023

Regional Coverage: Europe ■ United States

Although currently holding a relatively small share of the pharmaceutical market, topical drug delivery is witnessing a significantly stronger growth than oral solid dosage forms because of its ability to surpass the metabolism pathways of the stomach and liver, which means the skill to deliver localized treatment when the systemic delivery of active ingredients is not desired. On top of the segment's organic growth, topical excipients are benefiting from the switch to more advanced formulations in topical pharmaceutical products, which means adding benefits like sensory feel, bringing the topical formulations closer to cosmetic formulations.

## This Program Helps Subscribers to Answer Key Questions such as:

- What is the consumption of specialty excipients in topical pharmaceuticals in each region?
- Which suppliers are active in the market, and what excipients are they supplying?
- What is the inter-product competition in each regional market, and which excipients are preferred?
- What are the current trends in the topical formulations market, and how are they affecting excipients?
- What are the prices of various specialty excipients for topical pharmaceuticals?
- What is the forecast consumption of excipients for topical pharmaceuticals from 2018 to 2023?

## Report Contents

Excipients for Topical Pharmaceuticals: Market Analysis and Opportunities comprises of two key deliverables—a fully interactive database based on a new platform and a report per excipient category and excipient group for each region covered in the study structured as shown in Table 1.

### Introduction

### Topical Drugs Industry and Regulatory Overview

### Antimicrobials

### Antioxidants

### Emollients

### Emulsifiers and Surfactants

### Rheology Control Agents

### Silicones

### Solubilizers and Film Formers

Each of the excipient group chapters contains a detailed analysis of the following:

- Introduction
- Excipient categories and excipient products
- Estimated consumption
- Prices
- Industry structure
- Competitive landscape
- Appraisal and outlook





Table 1: Excipients Scope			
Group	Category	Excipient	
Emulsifiers and surfactants	Ethoxylates	Alcohol ethoxylates	
	Anionic emulsifiers		Cetyl/ Stearyl Sulfates
			Sodium Lauryl sulfate
	Fatty esters		Glyceryl Stearates
			Sorbitan Esters
			Polysorbates
	Alkyl esters	Isopropyl Stearate/ Palmitate	
	Synthetic organic polymers	PEG Derivatives (PEG-Stearates, PEG lauryl ether, etc.)	
	Glucolipids	Cetearyl alcohol/glucoside	
	Poloxamers		
Lipid-based	Glycerides, propylene glycol caprylates/laurates, Propylene glycol Caprylates/laurates, Polyoxyl glycerides, Polyglyceryl oleates		
Rheology control agents	Cellulose polymers and glucose derivatives	HPMC	
		HEC	
		CMC	
		Others	
	Synthetic organic polymers	Carbomer	
		Acrylate copolymers	
		Cationic LDP	
	Natural gums	Anionic LDP	
		Xanthan	
		Carrageenan	
Modified starch	Alginate		
Inorganics	Silica		
Antimicrobials	Preservatives	Parabens	
		Benzoic acid and Benzoates	
		Sorbic acid and sorbates	
		Benzalkonium chloride	
		Others (Phenyl mercuric acetate, Chlorobutanol, Phenoxyethanol)	
Antioxidants	Antioxidants	Butylated hydroxyanisole	
		Butylated hydroxytoluene	
Emollients	Polyol	Sorbitol	
	Emollient esters	Classic	
			Complex
			Castor oil
	Natural oils		Jojoba oil
			Lanolin/derivatives
			Shea Butter
			Squalane
	Waxes		Carnauba wax, Cetyl ester wax, Emulsifying wax, Microcrystalline wax, Paraffin wax, White wax, Yellow wax
		Synthetic organic polymers	Polyethylene glycol (PEG)
Petrolatum			
Silicones	Silicones	Dimethicones	
		Cyclomethicones	
		PEG/PPG dimethicones	
Solubilizers and film formers	Synthetic organic polymers	PVP	
		PVP/VA	



## Scope

This report is a comprehensive analysis of the excipients used in topical pharmaceutical formulations, the functions and properties each of the excipients bring to the formulations, their consumption and supply, and the drivers and restraints affecting the market. The data is presented in an interactive database on seven key excipient groups, several excipient categories, and a wide range of excipient products in the key regional markets of the United States and Europe. The database provides an overall market size of the excipient products by region and supplier. The database also focuses on forecasts through 2023. This study provides:

- Consumption of specialty excipients for topical pharmaceuticals
- Price of excipients for topical pharmaceuticals
- Competitive landscape for the excipients for topical pharmaceuticals
- Consumption forecast of excipients to 2023
- Detailed analysis of key drivers and restraints of the topical excipients consumption

## Key Benefits

This study assists suppliers of excipients in identifying opportunities within the topical segment of the two major regional markets. 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 topical excipients market
- Design regional marketing and sales strategies
- Develop market-entry and market expansion strategies
- Identify the competition in the topical excipients markets
- Capitalize on opportunities by identifying specific excipients or excipient categories poised for strong growth, as well as 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 60 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:

- Industry associations
- Government/regulatory agencies
- Marketers/suppliers
- Distributors
- Formulators/customers

### 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. Expert search and analysis of scientific papers, patents and other intellectual property (IP) databases and translation into meaningful strategic business information.

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, 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 60 years.

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