

The Specialty Excipients Market for Oral Solid-Dosage-Form Pharmaceuticals Global Series, 2005-2015

Regional Coverage

United States:

To be published 2nd Quarter
2008
Base Year 2007

Europe:

To be published 2nd Quarter
2008
Base Year 2007

India:

Published March 2007
Base Year 2005

Brazil:

Published December 2006
Base Year 2005

China:

Published September 2006
Base Year 2005

This comprehensive business analysis provides an understanding of the established and emerging markets for this complex and fragmented market segment, including:

- Detailed analyses of four major specialty excipient categories and more than 25 individual products
- Industry dynamics, regulatory issues, and key trends, including an assessment of the business implications of these issues
- An assessment of key technology trends and drivers in oral solid-dosage-form delivery systems
- A detailed assessment of specialty excipient procurement practices in each region
- Business profiles of selected leading and niche regional manufacturers and marketers of specialty excipients
- Ten-year overall business outlook and appraisal

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Report Scope

The Specialty Excipient Market for Oral Solid-Dosage-Form Pharmaceuticals Global Series, 2005-2015 is a continuation of Kline's benchmark series of in-depth reports on the various end-use markets for excipients. The program has been expanded to include key emerging markets from a demand and supply side perspective.

The program has been specifically designed to assist current and potential specialty excipient suppliers in:

- Understanding the market dynamics of each significant global region
- Capitalizing on the developing business opportunities
- Developing effective business strategies to protect current businesses from key market threats over the next ten years

The study series covers the emerging markets in China, Brazil, and India, as well as the established markets of the United States and Europe. Each regional volume features distinct and detailed analyses of four major specialty excipient categories and more than 25 individual products. Key industry dynamics and trends are also examined in each volume. Detailed assessments of specialty excipient procurement practices and business profiles of leading and niche specialty excipient and delivery technology suppliers are provided for each region. A ten-year forecast completes each regional volume.

The product types covered in this analysis are listed in Report Contents on the following page.

Key Benefits

This report series will provide subscribers with the necessary customer, competitive, and business intelligence to develop effective strategic business plans. It will serve as a critical reference source to answer the industry's most challenging questions. The foundation of information and insight will help facilitate the efficient allocation of financial, marketing, and manufacturing resources necessary for future business development.

Specifically, this report series will help subscribers to understand industry trends and answer important questions, including the following:

- How can we compete successfully and profitably in the global excipients market?
- How will my business be affected by generic excipients supplied from emerging countries such as India and China?
- How will the Brazilian market evolve from the demand and supply-side perspectives over the next ten years?
- How will customer expectations and purchasing criteria and practices change over the next five years in each region?
- How will future regional government regulations affect the current product landscape and the development of new specialty excipients?
- What are the growth opportunities for specialty excipients in each major global region?
- Should we market a broader excipient product range? Why?
- What could global harmonization mean to our business?

Forecasts in this report will be generated with Kline's FutureView Scenario Forecasting Model. With the enhanced forecasts, subscribers can see how adjustments in the assumptions behind the forecasts can bring about different outcomes.

Contents for Each Regional Report

1. INTRODUCTION

2. EXECUTIVE SUMMARY

3. PHARMACEUTICAL INDUSTRY OVERVIEW

4. SPECIALTY BINDERS AND FILLERS

- Alginates
- Cellulosics
 - Carboxymethyl cellulose sodium
 - Ethyl cellulose
 - Hydroxypropyl cellulose
 - Hydroxypropyl methyl-cellulose
 - Microcrystalline cellulose
- Dicalcium phosphate
- Directly compressible sucrose
- Lactose
- Polyols
- Mannitol
- Sorbitol
- Starch
- Xanthan gum

5. DISINTEGRANTS

- Crospovidone
- Croscarmellose sodium
- Sodium starch glycolate

6. LUBRICANTS

- Magnesium stearate

7. COATINGS

7A. Polymers/Film Formers

- Polymethacrylates
- Hydroxypropylmethyl cellulose
- Ethyl cellulose

7B. Formulated Coatings

7C. Coating Types

- Film coatings
- Instant-release sugar coatings

7D. Coating Functions

- Aesthetic/finishing coatings
- Protective coatings
- Enteric/delayed coatings
- Sustained-release coatings

For each product segment and individual product listed above, the following information will be provided:

- Average market pricing
- Estimated regional consumption in volume and value
- Estimated supplier sales

8. TECHNOLOGY TRENDS

This section will provide subscribers with a detailed discussion and analysis of key technology trends in oral drug delivery, including:

- Wet granulation versus direct compression
- Equipment
- Effect of direct compression on excipient requirements
- Changes in coatings/switch to formulated coatings
- Development of sustained-release technology
- Drug delivery houses and impact on technology development
- Development of polymer technology by excipient suppliers for sustained-release applications
- Rapid disintegrating tablets
- Nanoparticles
- Enrobing technologies
- Oral films/strips
- Solubility enhancers

9. PROCUREMENT PRACTICES

This section will provide subscribers with a detailed analysis of the excipient procurement path, including:

- Excipient selection criteria
- The formulator as the decision maker
- The role of the purchasing department
- Selected pharmaceutical companies and procurement practices employed
- Scale-up and production
- Key excipient supplier success factors
- Channels of distribution and role of distributors
- Key market trends
- Outlook

10. CHANNELS OF DISTRIBUTION AND KEY DISTRIBUTORS

11. REGULATORY ISSUES

This section will provide subscribers with an overview of key regulatory agencies as well as an assessment of the current and future regulatory issues that will significantly influence specialty excipient consumption

12. SUPPLIERS

Local manufacturers and marketers of excipients will be profiled in each region (charter subscribers will be able to direct which companies are profiled), including the following information:

- Background
- Products
- Sales by excipient in volume and value
- Distribution channels
- Appraisal

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Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts conduct in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including leading manufacturers and marketers of pharmaceutical OSDF products; leading manufacturers, marketers, and distributors of specialty excipients; and pertinent government agencies and trade associations.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research will represent the bulk of our research efforts. In addition, this analysis will be supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; Internet sources; and analysis of statistical data from government, industry, and trade associations and agencies.

Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insights and knowledge that helps companies find a clear path to success. 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 nearly 50 years. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Recently published or in-progress research for the chemicals and pharmaceutical industries includes:

- Specialty Biocides 2007: A Global Series of Regional Market Analyses
- Specialty Actives and Active Delivery Systems for Personal Care 2008
- U.S. Consumers' Perceptions of OTC Drugs 2007
- U.S. Retailers' Perceptions of OTC Drug Marketers 2008
- Nonprescription Drugs USA (published annually)
- Nonprescription Drugs Canada 2006
- Rx-to-OTC-Switch Strategies USA
- Specialty Raw Materials for Cosmetics & Toiletries Global Series
- Specialty Raw Materials for Cosmetics & Toiletries Global Database Service (annual subscription)

Kline's research and consulting services extend across the entire chemical and pharmaceutical industry value chain. We have been tracking and analyzing the U.S. and international markets for pharmaceuticals and pharmaceutical actives, excipients, and specialty ingredients for more than 20 years. In addition to our resources in the specialty chemicals sector, the members of our Healthcare practice have a thorough understanding of the markets for pharmaceutical products in the prescription and OTC segments.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

For more information about this study or Kline's other services, e-mail us at sales@klinegroup.com, visit our website at www.KlineGroup.com, or contact us at any of our regional offices listed below.

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+81-3-3242-6277

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+86-21-5382-6677

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- Direct access to the project team
- 1 day of consultation time to be used within six months of the publication date

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TOTAL						

NOTE: All prices in U.S. funds.

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