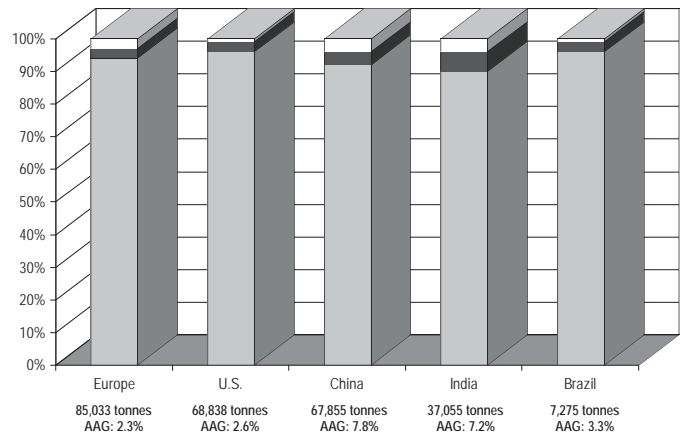


The Global Specialty Excipient Market for Oral Solid-Dosage-Form Pharmaceuticals, 2005-2015 - Volume II: Brazil

Fact Sheet

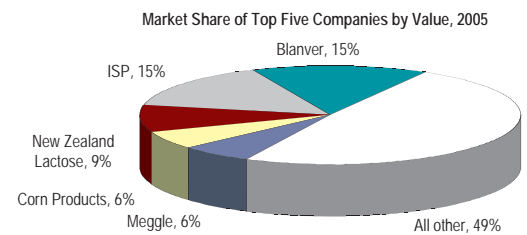
The Market

On a volume basis, the Brazilian market for specialty excipients is very small in comparison to other mature regional markets like the United States and Europe.



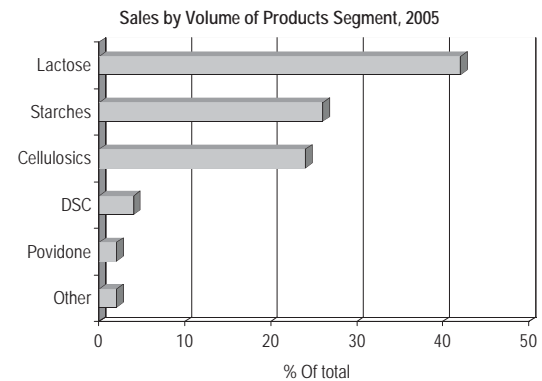
Companies

The supplier base for specialty binders and fillers, disintegrants, and lubricants is fragmented and diverse with more than 40 companies competing for market share. No single supplier controls more than 15% of the market value or 18% of the market volume. Blanver, ISP, New Zealand Lactose, and Corn Products together control 45% of the market value, while New Zealand, Corn Products, Meggle, and Blanver together control 54% of the market volume.



Customer Base

Lactose, starches, and cellulose together account for around 92% of specialty binder and filler consumption in Brazil on a volume basis.



Future Outlook

The Sustained Growth Scenario reflects average annual volume growth of 3.3% through 2010.

