



Specialty Excipients for Parenteral Pharmaceuticals:

Market Analysis and Opportunities

Published July 2017

Base Year: 2016

Forecasts to 2021

Regional Coverage: Europe ■ United States

Oral solid pharmaceuticals is the largest pharmaceutical segment globally because they combine high patient compliance and competitive manufacturing costs. The segment has therefore been a long-time focus for various players along the pharmaceutical value chain, including excipients suppliers. However, new technical challenges and notably the emergence of biologics are invigorating the parenteral pharmaceuticals segment, creating new opportunities for excipients suppliers. This report analyzes in detail the market of specialty excipients used in parenteral formulations.

This Report Helps Subscribers to Answer Key Questions such as:

- What are the sales of specialty parenteral excipients in each region?
- Which suppliers are active in the market, and which excipients are they supplying?
- What is the impact of the emergence of biologics in the choice of excipients?
- Is inter-product competition happening in the market, and what excipients are favored?
- What is the average price of various specialty excipients by region?
- What is the forecast consumption from 2016 to 2021?

Report and Database Contents

Specialty Excipients for Parenteral Pharmaceuticals is published 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:

Introduction

Pharmaceutical Industry and Regulatory Overview

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

The following three chapters on type of formulation each covers:

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

Lyophilization

Liquid Solution

Pharmaceutical Suspensions





Scope

Specialty Excipients for Parenteral Pharmaceuticals provides a detailed independent appraisal of the complex parenteral excipients markets in key consuming markets, such as Europe and the United States. This report 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. The 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 (2016-2021)

Excipients coverage includes over 21 specialty excipients, where some of them are used for more than one function, as shown in Table 1.

Key Benefits

This report assists excipient suppliers in identifying opportunities within the global parenteral segment. It also serves as an invaluable tool in the strategic planning process.

- Develop business strategies by understanding the trends driving 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 excipients categories poised for strong growth



Table 1: Product Segmentation

Type of formulation	Function	Excipient product
Lyophilization	Bulking agents and lyoprotectants	Mannitol Sucrose Trehalose PEG PVP
Liquid solutions	Tonicity adjusting agents	Dextrose Glycerin Mannitol Sodium chloride
	Solubilizing agents	Propylene glycol Glycerin Ethanol Polyethylene glycol Sorbitol Dimethylacetamide Cremophor EL
	Complexing and dispersing agents	Cyclodextrins
Pharmaceutical suspension	Flocculating/suspending agents	Electrolytes used in Parenteral Suspensions Sodium carboxymethyl cellulose Acacia Gelatin Methyl cellulose Polyvinyl pyrrolidone
	Wetting agents	Glycerin Alcohol Propylene glycol
	Surfactants (wetting agents)	Lecithin Polysorbate 20 Polysorbate 80
	Solvent system	Water Ethanol Glycerin Propylene glycol



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, 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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