

France Active Pharmaceutical Ingredients (Api) Market - Growth, Trends, Covid-19 Impact, and Forecast (2023 - 2028)

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Report description:

The French Active Pharmaceutical Ingredients (API) market is expected to register a CAGR of 6.1% over the forecast period.

The COVID-19 pandemic not only impacted the entire pharmaceutical supply chain but, more specifically, disrupted the supply of APIs from India and China. The lockdown measures and restrictions imposed by the government disrupted import-export activities across the globe, which led to shortages of drugs and APIs in the country. For instance, as per a news published in October 2022, the president of the Trade Union of Dispensing Pharmacists in France called on the government to take more initiative and appeal for policies to encourage manufacturers to produce drugs and APIs. Also, various companies took the initiative to set up a new company to boost API production in the country. For instance, in May 2020, Sanofi announced the development of a standalone company dedicated to producing active pharmaceutical ingredients components that are biologically active in a drug in France. This negatively impacted the market growth during the pandemic. However, with the release restrictions and resumed import-export activities, the demand for API in France is expected to increase over the forecast period.

The factors such as the rising prevalence of infectious, genetic, cardiovascular, and other chronic disorders, the increasing prevalence of cancer with growing sophistication in oncology drugs research, and the growing adoption of biologics and biosimilars are boosting the market growth.

According to the study published in PLOS ONE in January 2021, about 2.8 million people will have the chronic obstructive pulmonary disease (COPD) by 2025 in France. Thus, the expected increase in the number of people suffering from COPD will increase the demand for COPD drugs, such as bronchodilators, oral steroids, and others, thereby increasing the demand for APIs for manufacturing medicines and boosting market growth.

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Additionally, as per an article published in June 2021, obesity is considered a significant public health problem in France as it is a risk factor for chronic diseases, such as diabetes and hypertension, etc., which in turn has substantial psychological and social consequences. Obese people require more blood to supply oxygen and nutrients to the body, which causes an increase in blood pressure. According to 2022 statistics published by IDF, about 3.9 million were living with diabetes in France in 2021, and this number is projected to increase to 4.1 million and 4.2 million by 2030 and 2045, respectively. Diabetics are likely to develop various heart and liver diseases, which lead to the accumulation of lipids in the arteries, decreased cardiac rhythms, and other problems. This is anticipated to fuel the demand for various pharmaceutical products, which in turn is expected to increase the demand for API for drug formulation, propelling the market growth.

The increasing health expenditure in the country raises the government and companies focus on developing effective and safe drugs for treating various chronic as well as other diseases, thereby propelling the market growth. For instance, according to the data published by OECD, in June 2022, the healthcare expenditure in France was around USD 304.28 billion in 2021 compared to USD 209.2 billion in 2020. An increase in healthcare spending is expected to boost the development of treatment drugs and APIs, positively impacting the market growth.

Furthermore, the rising company activities in developing drugs and adopting various business strategies, such as expansion, product launches, collaborations, and others, contribute to market growth. For instance, in June 2022, STADA Arzneimittel and Alvotech launched a high-concentration, citrate-free adalimumab biosimilar (Hukyndra; AVT02) in France. Also, in April 2022, Sanofi reported that the French Autorite des marches financiers (AMF) approved the listing prospectus prepared by EUROAPI in connection with the intended listing of its shares on the regulated market of Euronext Paris.

Moreover, in December 2021, the UCB entered a commercialization agreement with Novartis to develop UCB0599 and UCB7853, two innovative and potentially disease-modifying investigational assets in Parkinson's disease.

Therefore, owing to the aforementioned factors, the studied market is expected to grow over the forecast period. However, the drug price control policies in the country, stringent regulations for drug approvals, and high competition between API manufacturers are expected to impede the growth of the active pharmaceutical ingredients market over the forecast period.

France Active Pharmaceutical Ingredients (API) Market Trends

Oncology Segment Expects to Register a Healthy CAGR

The oncology segment is expected to witness significant growth in France's API market over the forecast period. The factors attributing to the market growth are the rising burden of cancer cases and growing product launches and approvals in the country.

Certain factors increase the risk of developing cancer, including increasing age, obesity, harmful use of alcohol, family history of cancer, history of radiation or chemical exposure, reproductive history (such as age that menstrual periods began and age at first pregnancy), viral infections (human papillomavirus (HPV)), tobacco use, postmenopausal hormone therapy, and others. This is expected to increase the demand as well as the need to develop effective and safe cancer drugs, which further increases the demand for active pharmaceutical ingredients, such as abiraterone acetate, azacitidine, cabazitaxel, cytarabine that are used to manufacture oncology drugs. This is anticipated to augment the growth of the API market over the forecast period.

The increasing incidence and prevalence of various types of cancer in the country are expected to increase the market growth. For instance, according to GLOBOCAN 2020 fact sheet, 467,965 new cancer cases were reported in France in 2020. The same report projected that 579,388 new cancer cases are expected to be diagnosed in France by 2040. The major forms of cancer detected in France in 2020 were prostate (25.2%), lung (12.3%), colorectum (9.9%), bladder (5.1%), and kidney (3.7%) cancer.

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Also, as per a news published in October 2021, in France, 10%-15% of breast cancer cases diagnosed yearly are at a metastatic stage. Thus, the growing number of chronic diseases among the population is expected to increase the demand for better treatment and drug discovery. This, in turn, is anticipated to fuel the demand for APIs for developing cancer drugs, propelling France's market growth.

Furthermore, the rising company initiatives and investments to boost API production, as well as increasing product approvals in the country, are also contributing to market growth. For instance, in December 2021, Novasep, a supplier of services and technologies for the life sciences industry, invested EUR 6 million (USD 6.8 million) to increase and modernize its manufacturing capabilities to support the production of APIs, in areas such as oncology, central nervous system (CNS) and infectious diseases. Also, in October 2021, Trodelvy plus chemotherapy, a new antibody treatment for an aggressive form of breast cancer, was approved by the Minister of Health Olivier Veran in France.

Therefore, owing to the factors such as the rising burden of cancer, increasing demand for branded cancer drugs, and rising company activities in the country, the studied segment is anticipated to grow over the forecast period.

Branded Segment Expected to Have the Significant Market Share

The branded segment is expected to grow over the forecast period owing to the factors such as the high burden of chronic diseases, growing awareness regarding branded drugs among the population, as well as increasing company activities in developing drugs in the country. For instance, as per 2021 statistics published by Alzheimer Europe, 3.31% of the population in France is expected to suffer from dementia by 2050. Thus, the expected increase in the number of people suffering from dementia is anticipated to raise demand for drugs such as Aricept, Exelon, and others to treat the symptoms of mild to moderate symptoms in the patients, hence propelling segment growth.

In addition, the rising geriatric population, more prone to developing infectious and chronic diseases, raises the demand for effective medications. This, in turn, is anticipated to fuel the demand for APIs for drug formulation, hence boosting segment growth. For instance, as per an article published by the Journal of Clinical Medicine in March 2022, it has been observed that the prevalence of ischemic stroke is higher among people aged 45-64 years and men aged 18-34 and 35-44 years. As per the same source, the use of cannabis, cocaine, and other drugs has sharply increased among adults aged 18-64 years which is the main factor increasing the risk of developing cardiovascular diseases. Thus, the high burden of hypertension, stroke, and other cardiovascular disorders coupled with the rising geriatric population is anticipated to increase the demand for pharmaceutical drugs, thereby bolstering segment growth.

Furthermore, initiatives such as facility expansion and investments by key market players are expected to increase the company's focus on developing high-quality APIs, which is anticipated to fuel the market growth over the forecast period. For instance, in January 2022, Pfizer invested EUR 520 million (USD 594 million) to boost the production of COVID-19 pills in France. With this investment, the company is developing a production facility for its antiviral COVID-19 pill in the country. In addition, the investment initially involves the development of Paxlovid's API at Novasep's facility in France. Such investments are expected to boost the demand for APIs to develop branded drugs for treating various chronic diseases. This is anticipated to augment the segment growth over the forecast period.

Therefore, with the high burden of ischemic stroke and Alzheimer's disease, the changing lifestyle, and the growing company investments in developing APIs, the studied segment is expected to grow over the forecast period.

France Active Pharmaceutical Ingredients (API) Market Competitor Analysis

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The French Active Pharmaceutical Ingredients market is fairly fragmented, with the presence of several key players in the market. Several companies are adopting various business strategies such as collaboration, facility expansion, partnerships, and product launches to withhold their market position. Some of the key players in the market are Viatris Inc., Aurobindo Pharma, Teva Pharmaceutical Industries Ltd, Pfizer Inc., Novartis AG, BASF SE, and Merck KGaA, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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