

Active Pharmaceutical Ingredients: Global Markets

Market Research Report | 2024-10-17 | 119 pages | BCC Research

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Report description:

Description

Report Scope

This goal of this report is to impart in-depth knowledge of the global market for active pharmaceutical ingredients (APIs), in terms of both qualitative and quantitative data, to help readers assess the market landscape, develop business/growth strategies, and analyze their market position. BCC Research estimates market size for 2023 (the base year) and forecasts values for 2024 by the end of 2029. It is important to note that market size reflects the demand for APIs within a region or country rather than the API industry itself.

In this report, the API market is analyzed by manufacturer type, production method, molecule type, region and country. Industry growth trends, drivers, restraints and opportunities in the API market are also discussed in detail. The scope of the study is global.

Report Includes

- 64 data tables and 38 additional tables
- An analysis of the global markets for active pharmaceutical ingredients (APIs)
- Analyses of global market trends, with market revenue data from 2022 to 2023, estimates for 2024, forecast for 2025, and projected CAGRs through 2029
- Estimates of the size and revenue prospects of the global market, along with a market share analysis by origin, drug molecular entity type, manufacturer type, end use and region
- Facts and figures pertaining to the market dynamics, technical advances, API sources, production methods, route of synthesis, regulations, and the impact of macroeconomic variables
- A Porter's Five Forces model, and global supply chain and PESTLE analyses
- Patent activity featuring issues like patent expiry and its impact on the pharmaceutical market, and details of changes in pharmaceutical drug development
- Overview of sustainability trends and ESG developments, with emphasis on consumer attitudes, ESG score analysis, and the ESG practices of leading companies

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- Analysis of the industry structure, including companies' market shares, strategic alliances, M&A activity and a venture funding outlook
- Company profiles of major players within the industry, including Pfizer Inc., Thermo Fisher Scientific Inc., EuroAPI, Lonza, Siegfried Holding AG, and Divi's Laboratories Ltd.

Executive Summary

Summary:

In the global pharmaceutical supply chain, APIs act as the building blocks for drug development and manufacturing. The global market for APIs, including small-molecule APIs and biologic drug substances, was valued at \$247.8 billion in 2023, and it is expected to reach \$347.9 billion by the end of 2029. The rising demand for specialty drugs and the widespread use of generic medicines is driving this growth. Technological advances in API production, scaling production capacities, the rising incidence of chronic diseases, expanding global healthcare infrastructures and increased investments in drug development are also driving this growth.

Chemical synthesis of APIs is the main method for the production of APIs and acts as a replacement for natural extraction procedures to improve economies of scale. The global market for synthetically manufactured APIs was valued at \$181.3 billion in 2023, and this market is expected to achieve a CAGR of 5.4% and reach a value of \$246.1 billion by the end of 2029. The importance of biotech production methods is growing due to the rise of biologic drug products made almost exclusively this way. Advances in synthetic biology technologies, such as genetic engineering, metabolic pathway optimization and analytical instrumentation, have further enhanced the efficiency and yield of biotechnology processes, making them more commercially viable. The global market for APIs manufactured through biotech methods was valued at \$66.5 billion in 2023, and this market is expected to have a CAGR of 7.4% and reach a value of \$101.7 billion by the end of 2029.

The COVID-19 pandemic exposed the risks of over-reliance on specific regions for API production. As a result, there is a trend toward diversifying the supply chain and increasing domestic API manufacturing capabilities in the U.S., Europe, Japan and India to enhance supply chain resilience.

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Company Profiles

AUROBINDO PHARMA

DIVI'S LABORATORIES LTD.

EUROAPI

EVONIK INDUSTRIES AG

LONZA

PFIZER INC.

SIEGFRIED HOLDING AG

TEVA PHARMACEUTICAL INDUSTRIES LTD.

THERMO FISHER SCIENTIFIC INC.

WUXI APPTEC

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