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Prefilled Syringes Market, 2012-2017

https://marketpublishers.com/r/P2A4067B44FEN.html
Date: November 2012
Pages: 137
Price: US$ 1,699.00 (Single User License)
ID: P2A4067B44FEN

Abstracts

Introduction

Prefilled syringes are gaining strong acceptance in the market as drug delivery systems for injectable drugs. They have become a preferred device for parenteral administration of drugs, mainly used for treatment of chronic conditions requiring patients to self-administer medication several times a week.

The rising demand for prefilled syringes is driving the manufacturers to introduce improvements in technology related to the material of prefilled syringes, and lubrication technology to reduce leachables and extractables. These developments are primarily to accommodate the increasing number of biologic drugs reaching the market. Additionally, the companies have developed multi-chamber prefilled syringes for use with lyophilised drugs. We look at how these developments and others factors are shaping the market and discuss the factors creating opportunities in the market for prefilled syringes.

While the market is still relatively small, capturing just 25.4% of total injectable drug delivery systems market, it is forecasted to grow strongly over the period 2012-2017. The prefilled syringes market faces some significant challenges ahead, but the outlook looks promising.

Scope of the Report

The Prefilled Syringe Market report provides a comprehensive analysis of the state of prefilled syringes market in 2011 - 2017. Starting with the basic introduction to prefilled syringes, their origin, components, and manufacturing material, the report talks about needlestick injuries and looks at the safety laws and legislations across major regional markets for prefilled syringe. The report focuses on analysing the existing market size and potential future growth of these drug delivery devices across different regions. We have also discussed the leading prefilled syringe manufacturers in the industry and the likely future developments driven by these companies.

The report also analyses the market size of the most important drug therapeutic classes, which are available in prefilled syringes. This includes analyses of the leading drugs in each class present in prefilled syringes. The report contains a brief overview of biologics and biosimilars market, one of the primary drivers for growth of the market.

A key objective of the report is to enumerate various prefilled syringes systems available in the market, drugs available in prefilled syringes and the market potential of these devices across different geographical regions. The report discusses various historical / likely future trends which have shaped / will shape the US, European, Japanese, Chinese and Rest of the world (RoW) markets including India and Indonesia.

The market forecasts across different segments and regions have been presented till 2017. 2011 is the base year and actual figures have been taken, analysed from publicly available information. Unless otherwise specified, all figures are presented in USD.

The report also provides profiles of leading manufacturers of prefilled syringes, with analyses of their product portfolio and financial performance. Our report provides a comprehensive view on the worldwide presence of prefilled syringe manufacturers, helping understand the gaps and opportunities.

Key Highlights

1. The global prefilled syringes market is likely to achieve sales of USD 6.1 BN by 2017, growing at a compounded annual growth rate (CAGR) of 13.3% from 2011 to 2017.
2. Plastic syringes accounted for just 0.5% of total prefilled syringes market in 2011. Their share is expected to increase with the development of improved polymers that offer better leachables and extractables profile compared to glass syringes.
3. Increasing number of suppliers now provide ready to fill/ sterile prefilled syringes, which make up more than 80.0% of the prefilled syringes market in 2011.
4. Developed markets of the US and Europe together accounted for 85.0% of the prefilled syringes market in 2011.
5. The integration of prefilled syringes with advanced delivery systems such as pen and autoinjectors will be one of the key drives for their adoption going forward.
6. Companies are developing innovative technology for improving the compatibility profile of prefilled syringes with biologic drugs, including development of lubrication

technology for silicone-free syringes.
7. Increase in the number of self-injecting patients and development of biologic drugs will be the primary drivers for market growth.

Research Methodology

Most of the data presented in this report has been gathered by secondary research. We have also conducted interviews with experts in the area (academia, industry, medical practice and other associations) to solicit their opinions on the emerging trends in the market. This is primarily useful for us to draw out our own opinion on how the market will shape up across different regions and drug segments. Where possible, the available data has been checked for accuracy from multiple sources of information.

The secondary sources of information include

- Annual reports
- Investor presentations
- SEC filings
- Industry databases
- News releases from company websites
- Government policy documents
- Other analysts' opinion reports

While the focus has been on forecasting the market over the coming five years, the report also provides our independent view on various technological and non-commercial trends emerging in the industry. This opinion is solely based on our knowledge, research and understanding of the relevant market gathered from various secondary and primary sources of information.

The 2011 data are actual sales as reported in the company annual reports and represent full year sales for respective fiscal years

Chapter Outlines

Chapter 1 is a high level Executive Summary of the key market insights presented in the report.

Chapter 2 provides a general overview of prefilled syringes including their origin, components, types, and manufacturing material. The chapter also talks about needlestick injuries and various preventive laws worldwide have been discussed with focus on safety features in prefilled syringes.

Chapter 3 highlights the global market for injectable drug delivery systems, including prefilled syringes in 2011 and the likely future growth trends till 2017. This chapter analyses the market with respect to the leading prefilled syringe segments and the leading companies. Also included is our analysis of the glass and plastic prefilled syringe systems available in the market, including their advantages and disadvantages are material of choice for syringe barrel.

Chapter 4 analyses the regional markets (the US, Europe, Japan, China and RoW) for prefilled syringes. Within each region, the chapter focuses on the market size and various technological, commercial and regulatory details.

Chapter 5 looks at the market for injectable drugs and biologics in 2011 and market forecast for biologics to 2017. The chapter also highlights the leading therapeutic drug classes available in prefilled syringes. Also provided is a list of top ten drugs in prefilled syringes with three case studies.

Chapter 6 details the technological developments in prefilled syringes market. It discusses the prefilled syringes manufactured for lyophilised drugs, silicone-free syringes and prefilled syringes with integrated safety features.

Chapter 7 provides profiles of the key manufacturers of prefilled syringes. Each company profile includes information on financial performance, geographical presence, marketed devices, role and strategy for manufactured devices and recent developments.

Chapter 8 provides the SWOT analysis of prefilled syringes market giving strategic insights in to the major factors that have contributed to the growth of the market, while highlighting the weaknesses and threats that can negatively impact the growth.

Chapter 9 summarises the overall report. In this chapter, we provide a recap of the key takeaways and our independent opinion based on the research and analysis described in previous chapters.

Chapter 10 is an appendix, which provides tabulated data and numbers for all the figures provided in the report.

Chapter 11 is an appendix, which provides a list of companies and organisations mentioned in this report.

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4. European Agency of Occupational Safety and Health
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6. Food and Drug Administration (FDA)
7. International Diabetes Federation
8. Ministry of Health, Labour and Welfare (MHLW)
9. Pharmaceutical Research and Manufacturers of America (PhRMA)
10. Pharmaceuticals and Medical Devices Agency (PMDA)
11. The Health Industry Distributors Association (HIDA)
12. The Research Foundation for Microbial Diseases of Osaka University
13. United Nations Children’s Fund (UNICEF)
14. World Health Organization (WHO)

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