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Global Active Pharmaceutical Ingredients (API) and High Potency API (HPAPI) Industry Outlook to 2016 - Shifting Focus Towards Biotechnology

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Abstracts

The report titled “Global Active Pharmaceutical Ingredients (API) and High Potency API (HPAPI) Industry Outlook to 2016 - Shifting Focus Towards Biotechnology” provides a comprehensive analysis of the market size of the global API industry based on the regions such as North America, Asia-Pacific and Western Europe, market segmentation by generic and innovator API and on the basis of revenue earned from pharmaceutical raw materials for own needs and from commodity bulk drugs sold. The global API market is also segmented on the basis of synthetic and biotechnology based APIs. An analysis of the market size of global HPAPI industry is provided on the basis of regions such as North America, Europe and Asia-Pacific and the market segmentation by revenue from innovator and generic HPAPI.

GLOBAL

The global API market in 2011 valued at USD ~million as compared to USD ~ million in 2005 with an appreciation for the generic and innovator APIs throughout the globe. The market in 2011 inclined by ~% of which Asia-Pacific witnessed a strong growth of ~% followed by Western Europe with a growth rate of ~% during the year. The robust growth rate can be attributed to the patent expiry of several innovator APIs in the recent years thereby driving the market for generic APIs in almost all the regions in the world.

The global HPAPI industry worldwide has showcased a favorable growth trend in the recent past other than the setback in the year 2009 which was the result of the global economic turbulence. The industry was valued at USD ~ million in 2011 and has proclaimed to be a niche yet fastest growing segment of the API industry. The global API market which has traditionally been dominated by small molecule drugs or the synthetic molecules has been gradually witnessing a shift towards the

biopharmaceuticals.

NORTH AMERICA

North America has the most advanced and highly developed healthcare system with the largest pharmaceutical spending in the historical years. The country is the world's largest API market since many years with a share of ~% across the globe in 2011. The US was the largest market for APIs with generic APIs contributing ~% to the total revenue generated by the North America commodity bulk drugs market in 2011 and innovator APIs contributing ~% to the market during the year. Biologics and generics are the fastest growing segments of this industry. Biotechnology-derived APIs in the region which were valued at USD ~ million in 2011 are a growing constituent of the pharmaceutical industry.

The HPAPI market in North America has been a highly developed and regulated pharmaceutical market with 44.8% share in the overall market for HPAPI in the world. The region has been cited as the most sought after in the research and development of high potency compounds over the years.

ASIA PACIFIC

Asia-Pacific is the second largest API market in the world with a contribution of ~% to the global commodity bulk drugs market. The region has shown outstanding performance in the last few years and has emerged as the fastest growing pharmaceutical industry in the world. It has recorded the highest growth rates in the API segment among the other continents across the globe It was recorded that around ~% of the APIs used for manufacturing pharmaceutical products in the US and Western Europe were imported from Asia-Pacific countries in 2011

The low costs coupled with skilled manpower have made Indian firms highly competitive suppliers of the API manufacturing, research and development and outsourcing activities. It was observed that the country's contribution in the Asia-Pacific API market has increased significantly from ~% in 2005 to ~% in 2011. The commodity bulk drugs market size of China was valued at USD ~ million in 2011 as compared to USD ~ million in 2005.

The HPAPI market in Asia-Pacific is expected to grow at a CAGR of 17% from 2012-2016 and will reach USD 1,937.1 million by 2016.

EUROPE

The Western Europe API market has experienced several ups and down over the past

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few years with the emergence of Asia-Pacific countries in the global API production. Western Europe has emerged as the third largest market for the APIs with a share of ~% in the global API market in 2011 as compared to ~% share in 2005.

Italy is the largest market for commodity bulk drugs in Western Europe with sales of USD ~ million in 2011 as compared to USD ~million in 2005. It was perceived that Italy held the leading position as the exporter of APIs to the US in 2011. The country exported USD ~ million generic APIs to the US in 2005.

The HPAPI industry in Europe is held by few of the major countries such as the UK, Germany and France. The market in the UK is the largest contributor to the overall revenue of the HPAPI in Europe. The France HPAPI industry has witnessed a strong growth rate in the HPAPI market in Europe. In 2011, the market recorded revenue worth USD ~ million thereby growing by 14.7% during the year on account of rise in the demand for oncology drugs in the country.

KEY TOPICS COVERED IN THE REPORT

The market size of the Global API Industry and its segments such as generic and innovator API, pharmaceutical raw materials for own needs and commodity bulk drugs sold, 2005-2011 and synthetic and biotech based API market share, 2011.

The market size of HPAPI industry and segments such as generic and innovator HPAPI.

The market size of the global API industry in the three regions such as North America, Western Europe and Asia-Pacific, 2005-2011.

The market size of the global HPAPI industry in the three regions such as North America, Europe and Asia-Pacific, 2005-2011.

Market segmentation of global API industry in regions such as Asia Pacific, Western Europe and North America on the basis of revenue of generic and innovator API, 2005-2011.

Trends and Development of the Global API Industry.

Competitive landscape of the major players of API in the world US, 2009 &

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2011.

Company profile of the major producers of API in the world.

Future outlook and projections of API and HPAPI Industry on the basis of total revenue and segment revenue from innovator and generic for API and HPAPI, 2012-2016.

Macroeconomics and industry factors including Research and development expenditure on pharmaceuticals, number of inpatient discharges healthcare expenditure per capita and ageing population, 2005-2011.

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