

Global 10-Deacetylbaccatine III Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global 10-Deacetylbaccatine III market size is expected to reach \$ 153 million by 2032, rising at a market growth of 9.5% CAGR during the forecast period (2026-2032).

This report studies the 10-Deacetylbaccatin III market. 10-Deacetylbaccatin III, also known as 10-DAB or 10-DAB III, is a closely related natural organic compounds isolated from dried needles and small branches of the European yew tree (*Taxus baccata*). 10-Deacetylbaccatin III is a precursor to the anti-cancer drug docetaxel (Taxotere). paclitaxel (taxol); cabazitaxel. 10-10-deacetylbaccatin III was found to selectively inhibit the growth of *L. DONOVANI* intracellular amastigotes within J774 murine macrophages in vitro at nanomolar concentrations with an IC(50) value of 70 nM. 10-DAB III, full name 10-Deacetylbaccatine III, is a natural tetracyclic diterpenoid taxane extracted from *Taxus* twigs and leaves. It appears as off-white crystalline powder, poorly soluble in water but soluble in common organic solvents. As a core pharmaceutical intermediate, it is the key starting material for semi-synthesis of Paclitaxel, Docetaxel and Cabazitaxel, three mainstream anti-cancer APIs. Besides bulk drug manufacturing, it is also widely applied in novel taxane derivative research and pharmaceutical reference standard preparation.

The price of pharmaceutical-grade 10-DAB III (>98% HPLC) fluctuates between 1800-3200 US dollars per kilogram, affected by raw material yield, extraction cost and global market demand. Its industrial chain starts from *Taxus* cultivation and raw leaf harvesting in China and India, followed by plant extraction, purification and fine refinement at professional manufacturers including South Pharmaceutical, Alchem and Yunnan Hande. After finished intermediate production, 10-DAB III is globally traded to pharmaceutical factories for semi-synthesis of Paclitaxel, Docetaxel and Cabazitaxel bulk drugs. Downstream finished anticancer medicines are then processed into

injections for worldwide clinical use. Emerging R&D demand for taxane ADC drugs also steadily lifts long-term market consumption of this core intermediate. Global 10-Deacetylbaaccatin III key players include SM Herbals, Alchem International, Indena, etc. Global top three manufacturers hold a share over 50%. China is the largest market, with a share over 35%, followed by United States and Europe, both have a share over 50 percent. In terms of product, 98.0% is the largest segment, with a share over 85%. And in terms of application, the largest application is Production of Docetaxel, followed by Production of Paclitaxel, etc.

Market Driving Factors

Sustained clinical demand for anti-cancer medicines

Paclitaxel, Docetaxel and Cabazitaxel remain essential first-line chemotherapy drugs for multiple malignant tumors worldwide. Stable global sales of finished anticancer drugs create steady basic procurement demand for 10-DAB III as their core semi-synthetic intermediate.

Advancing development of novel taxane derivatives and ADC drugs

Growing R&D investment in antibody-drug conjugates and innovative taxane anti-tumor agents expands downstream application scenarios, generating incremental consumption of high-purity 10-DAB III.

Expansion of mature generic drug market globally

Mass approval of generic versions of paclitaxel-series APIs in emerging pharmaceutical markets boosts bulk purchase of standard-grade 10-DAB III and fuels overall market volume growth.

Advantages of plant extraction industrialization in China and India

Large-scale Taxus planting and mature extraction & purification technologies in China and India guarantee stable raw material supply, lower comprehensive production cost and promote global market popularization of plant-derived 10-DAB III.

Strict restriction on wild Taxus resource exploitation

Regulatory bans on wild Taxus harvesting push standardized cultivated Taxus as exclusive raw material source, stabilizing orderly supply pattern of formal qualified manufacturers.

Market Challenges

Unstable yield fluctuation of Taxus raw material

Taxus growth cycle is long, climate change, planting scale adjustment directly affect leaf output, causing periodic raw material price volatility and impacting production cost of 10-DAB III.

High purification technical threshold for high-pharma-grade products

High-end 98% and above purity products require sophisticated refining process and precision testing equipment; core purification technologies are concentrated in leading enterprises, raising R&D investment for new market participants.

Intensified low-end price competition among manufacturers

Excess low-purity crude intermediate capacity triggers vicious price competition, squeezing gross profit space of regular manufacturers producing qualified pharmaceutical-grade 10-DAB III.

Strict quality certification and long downstream qualification audit

Products for overseas API factories need DMF, pharmacopoeia compliance certification; downstream pharmaceutical customers carry out lengthy supplier qualification verification, delaying new supplier order access.

Alternative biosynthetic process industrialization impact

Cell culture and biosynthesis routes for 10-DAB III are gradually industrialized; mature alternative technology in the future will bring substitution pressure to traditional plant extraction manufacturers.

This report studies the global 10-Deacetylbaaccatine III production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for 10-Deacetylbaaccatine III and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends

and competition, as well as details the characteristics of 10-Deacetylbaaccatine III that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global 10-Deacetylbaaccatine III total production and demand, 2021-2032, (Kg)

Global 10-Deacetylbaaccatine III total production value, 2021-2032, (USD Million)

Global 10-Deacetylbaaccatine III production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kg), (based on production site)

Global 10-Deacetylbaaccatine III consumption by region & country, CAGR, 2021-2032 & (Kg)

U.S. VS China: 10-Deacetylbaaccatine III domestic production, consumption, key domestic manufacturers and share

Global 10-Deacetylbaaccatine III production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kg)

Global 10-Deacetylbaaccatine III production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kg)

Global 10-Deacetylbaaccatine III production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kg)

This report profiles key players in the global 10-Deacetylbaaccatine III market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Phyton Biotech, Deccan Nutraceuticals, Alchem International, Indena, South Pharmaceutical, Sai Phytoceuticals, Sarv Biolabs Pvt, Aphios, Taxus Pharma, Yunnan Hande, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World 10-Deacetylbaaccatine III market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kg) and average price (US\$/Kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the

forecast year.

Global 10-Deacetylbaccatine III Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global 10-Deacetylbaccatine III Market, Segmentation by Type:

?95%

?98.0%

Others

Global 10-Deacetylbaccatine III Market, Segmentation by Production Source:

Natural Extraction

Cell Culture/Fermentation Source

Semi-synthetic/Conversion Method

Global 10-Deacetylbaecatin III Market, Segmentation by Impurity Control Level:

Pharmacopoeia Grade

High Purity Grade

Industrial Grade

Global 10-Deacetylbaecatin III Market, Segmentation by Application:

Production of Docetaxel

Production of Paclitaxel

Others

Companies Profiled:

Phyton Biotech

Deccan Nutraceuticals

Alchem International

Indena

South Pharmaceutical

Sai Phytoceuticals

Sarv Biolabs Pvt

Aphios

Taxus Pharma

Yunnan Hande

Kavya Pharma

Jinhe

Key Questions Answered:

1. How big is the global 10-Deacetylbaccatine III market?
2. What is the demand of the global 10-Deacetylbaccatine III market?
3. What is the year over year growth of the global 10-Deacetylbaccatine III market?
4. What is the production and production value of the global 10-Deacetylbaccatine III market?
5. Who are the key producers in the global 10-Deacetylbaccatine III market?
6. What are the growth factors driving the market demand?

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