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Global Inhalation-Grade Hard Capsules Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Inhalation-Grade Hard Capsules market size was valued at US$ 39.00 million in 2025 and is forecast to a readjusted size of US$ 62.08 million by 2032 with a CAGR of 6.7% during review period.

Inhalation-Grade Hard Capsules are two-piece empty hard capsules specifically engineered as dose-containment and drug-delivery components for capsule-based dry powder inhalers. The products are primarily manufactured from pharmaceutical-grade gelatin or hydroxypropyl methylcellulose, with Size 3 representing the most widely adopted commercial format and Size 2 and Size 0 serving formulations requiring larger fill volumes. Compared with conventional oral hard capsules, Inhalation-Grade Hard Capsules require tighter control of shell moisture, microbiological limits, electrostatic behavior, powder adhesion and mechanical properties to ensure stable puncturing, cutting or opening within inhaler devices and consistent powder release. Commercial products typically emphasize low powder retention, controlled static charge, reliable puncture characteristics and compatibility with automated capsule filling and DPI devices. The principal downstream uses are commercial DPI drug manufacturing and DPI drug development and clinical manufacturing, where the capsule functions as a precision container for inhalable API and carrier formulations rather than as the therapeutic ingredient itself.

Key Findings

Global sales volume is estimated at approximately 9.3 billion capsules in 2025

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and 9.9 billion capsules in 2026

Modeled global ASP is approximately US$4.08 per 1,000 capsules in 2025 and US$4.12 in 2026

Gelatin and HPMC are the two established shell-material routes, with HPMC offering advantages for lower-moisture formulations

Size 3 is the most common DPI capsule format, while Size 2 and Size 0 support higher fill-volume requirements

Commercial DPI drug manufacturing accounts for the dominant share of capsule consumption, while development and clinical manufacturing remain smaller specialized uses

Market Trends

The Inhalation-Grade Hard Capsules market is moving from adaptation of conventional pharmaceutical capsules toward purpose-engineered DPI capsule platforms. Product development increasingly focuses on low powder retention, reduced electrostatic interaction, repeatable puncture geometry, controlled microbiological specifications and mechanical robustness across different humidity conditions. HPMC capsules are gaining strategic importance for moisture-sensitive formulations because their shell moisture content can be materially lower than conventional gelatin capsules, while gelatin remains important because of its mature manufacturing process, established filling performance and cost competitiveness. In 2025, next-generation commercial developments further emphasized mechanical stability across broader humidity ranges and reduced powder retention, indicating that capsule performance is becoming more closely integrated with aerosolization and dose-delivery requirements. Integrated development models combining inhalation-grade capsules, carrier excipients, formulations and inhaler-device compatibility are also becoming more important in both innovative and generic DPI development.

Market Dynamics

Drivers

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Growth is supported by the large long-term treatment base for inhaled therapies, continued development of capsule-based DPI products and increasing emphasis on propellant-free inhalation technologies. Capsule-based DPIs provide unit-dose protection and can avoid the propellants used in pressurized metered-dose inhalers, while specialized capsules improve dose reproducibility through lower powder adhesion and more predictable device opening. Regulatory developments also reinforce the long-term transition toward lower-emission inhalation technologies. Under the EU fluorinated greenhouse gas framework, HFC-containing metered-dose inhalers entered the quota system from January 2025, creating an additional structural incentive for pharmaceutical companies to evaluate lower-carbon inhalation alternatives, although the transition will involve multiple inhaler technologies rather than DPI alone.

Restraints

Market expansion is constrained by competition from multidose blister DPIs, reservoir DPIs, soft-mist inhalers and next-generation lower-GWP metered-dose inhalers. Capsule-based systems also require the patient to load individual capsules into the inhaler, making convenience and device handling important considerations in therapy selection. At the component level, inhalation-grade capsules face materially tighter requirements than standard oral capsules: shell brittleness, moisture migration, static charge, powder retention, puncture behavior and microbial contamination can all influence delivered dose. Qualification cycles are therefore lengthy, and switching capsule suppliers after pharmaceutical registration can require additional compatibility, stability and regulatory work, limiting rapid supplier substitution.

Opportunities

The principal opportunity lies in higher-performance HPMC and other specialized inhalation-grade capsule platforms designed for moisture-sensitive formulations and increasingly stringent dose-delivery requirements. Generic DPI development in emerging pharmaceutical manufacturing markets creates additional opportunities for qualified capsule suppliers able to provide stable quality, regulatory documentation and device compatibility. New capacity in India and China is broadening the global manufacturing base, while established suppliers continue to differentiate through formulation support, aerosolization performance and application engineering. The combination of capsules with optimized inhalation excipients represents another value-creation opportunity because formulation developers increasingly assess the capsule, carrier powder and inhaler device as an interconnected delivery system rather than as

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independent components.

Challenges

The key industry challenge is maintaining pharmaceutical-grade consistency while global production capacity expands and pricing competition intensifies. Inhalation applications use relatively small powder fill masses, making minor variations in static charge, internal surface characteristics, lubrication and shell mechanics more consequential than in many oral capsule applications. Manufacturers must therefore maintain tight process control and customer-specific qualification while supporting multiple inhaler mechanisms and formulations. At the same time, long pharmaceutical development cycles create uncertainty around the conversion of pipeline projects into commercial capsule volumes, while future inhaler technology choices may redistribute demand among capsule-based DPI, multidose DPI and other low-carbon inhalation platforms.

Industry Chain Analysis

The upstream segment of the Inhalation-Grade Hard Capsules industry primarily consists of pharmaceutical-grade gelatin, HPMC, purified water and specialized processing materials used in capsule formation, lubrication, coloring and printing. Material purity and consistency are critical because capsule moisture, mechanical strength, electrostatic behavior and microbiological specifications directly influence inhalation performance. The midstream segment covers capsule formulation, dipping and forming, controlled drying, trimming, joining, inspection, printing, microbiological control and application-specific performance testing. Compared with standard hard capsules, inhalation-grade products create additional value through tighter control of powder retention, puncture characteristics, humidity response and interaction with DPI formulations.

Downstream customers include pharmaceutical companies, inhalation-drug developers and CDMOs that fill APIs and carrier formulations into capsules, pair them with compatible DPI devices and package the resulting medicinal products. Commercial pharmaceutical manufacturing generates the majority of physical capsule demand, while development, stability studies, clinical batches and registration activities use substantially smaller volumes but require extensive technical support. Value within the chain therefore depends not only on capsule manufacturing cost but also on formulation

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compatibility, regulatory documentation, manufacturing consistency, application engineering and the ability to remain qualified throughout the commercial life cycle of a drug product.

Segment Insights

By product type, the market is concentrated in Gelatin Inhalation Capsules and HPMC Inhalation Capsules. Gelatin remains a mature and cost-efficient platform with established high-speed manufacturing performance, while HPMC provides lower shell moisture and improved resistance to brittleness under low-humidity conditions, making it particularly relevant for hygroscopic and moisture-sensitive inhalation formulations. Specialized DPI products increasingly optimize both materials for powder release and device interaction rather than relying on conventional oral-capsule specifications. Other shell materials remain commercially less established in inhalation applications and therefore represent a limited portion of the current market.

By capsule size, Size 3 represents the principal commercial specification for capsule-based DPI applications, while Size 2 and Size 0 are used where larger formulation fill volumes are required. By application, Commercial DPI Drug Manufacturing dominates unit consumption because approved products require recurring large-scale capsule filling, whereas DPI Drug Development and Clinical Manufacturing represents a smaller but technically important segment covering formulation screening, stability programs, clinical batches and registration-stage manufacturing.

Downstream Market Opportunities

Future downstream opportunity is concentrated in expanding commercial production of capsule-based DPI medicines, generic inhalation products and development programs requiring improved control of moisture, aerosolization and dose reproducibility. Demand is increasingly linked to the ability of capsule suppliers to participate earlier in formulation and device-development programs rather than serving solely as commodity shell vendors. Pharmaceutical developers evaluating moisture-sensitive APIs, complex combination therapies and new pulmonary delivery programs offer additional opportunities for HPMC and other high-performance capsule solutions. The broader transition toward lower-emission inhalation systems also strengthens the strategic position of propellant-free DPI technologies, although capsule-based systems will continue to compete with multidose DPI and other inhaler architectures.

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Regional Insights

The supply structure is geographically differentiated. Europe remains important for premium capsule technology, application development and global pharmaceutical customer support, supported by established suppliers with long histories in specialized inhalation capsules. India has developed the broadest concentration of independent dedicated hard-capsule manufacturers in the confirmed supplier pool and combines large-scale pharmaceutical capsule capacity with increasingly specialized DPI products. China is emerging as another important expansion area as established hard-capsule manufacturers develop dedicated inhalation-grade products and strengthen regulatory and production capabilities. Korea maintains a specialized position through established inhalation-capsule technology, while North America remains important as a pharmaceutical development, commercial drug manufacturing and CDMO market despite a smaller number of independent inhalation-capsule manufacturers headquartered in the region.

The regional competitive balance is therefore different on the supply and demand sides. European suppliers emphasize technology, regulatory support and global qualification relationships, while Indian and Chinese manufacturers increasingly compete through manufacturing scale, cost efficiency, product specialization and international compliance. Future regional shifts are likely to depend on how rapidly Asian suppliers obtain qualification for regulated-market DPI programs and how strongly pharmaceutical companies diversify their capsule supply chains.

Competitive Landscape Analysis

The Inhalation-Grade Hard Capsules market combines global pharmaceutical capsule groups with specialized regional manufacturers. The confirmed competitive set includes 15 group-level or independent manufacturing suppliers after parent-subsidiary duplication is removed. Lonza, Roquette, ACG and SUHEUNG represent established international platforms with dedicated inhalation capsule technologies, while a broader group of Indian manufacturers and an expanding Chinese supplier base increase manufacturing depth and competitive intensity. Competitive differentiation is increasingly based on low powder retention, puncture reliability, humidity stability, microbiological control, HPMC capability, device compatibility and regulatory support rather than on capsule dimensions alone. Global suppliers benefit from long-standing pharmaceutical qualification relationships and application-development capabilities, whereas newer Asian manufacturers can compete through capacity, cost structure and

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increasingly specialized DPI product lines. Because qualification and supplier changes for registered inhalation products can involve substantial technical and regulatory work, customer relationships tend to be relatively sticky once a capsule has been incorporated into a commercial drug-device combination.

Report Scope

This report is a detailed and comprehensive analysis for global Inhalation-Grade Hard Capsules market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Inhalation-Grade Hard Capsules market size and forecasts, in consumption value ($ Million), sales quantity (M Capsules), and average selling prices (US$/Capsule), 2021-2032

Global Inhalation-Grade Hard Capsules market size and forecasts by region and country, in consumption value ($ Million), sales quantity (M Capsules), and average selling prices (US$/Capsule), 2021-2032

Global Inhalation-Grade Hard Capsules market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (M Capsules), and average selling prices (US$/Capsule), 2021-2032

Global Inhalation-Grade Hard Capsules market shares of main players, shipments in revenue ($ Million), sales quantity (M Capsules), and ASP (US$/Capsule), 2021-2026

The Primary Objectives in This Report Are:

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To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Inhalation-Grade Hard Capsules

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Inhalation-Grade Hard Capsules market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Lonza Group AG, Roquette, ACG, SUHEUNG Co., Ltd., HealthCaps India Limited, Natural Capsules Limited, Sunil Healthcare Limited, United Capz Pvt. Ltd., Eva Grow Medicaps Private Limited, Erawat Pharma Limited, etc.

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

Inhalation-Grade Hard Capsules market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Gelatin Inhalation Capsules

HPMC Inhalation Capsules

Other

Market segment by Capsule Size

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Size 3 Capsules

Size 2 Capsules

Size 0 Capsules

Other

Market segment by Application

Commercial DPI Drug Manufacturing

DPI Drug Development and Clinical Manufacturing

Other

Major players covered

Lonza Group AG

Roquette

ACG

SUHEUNG Co., Ltd.

HealthCaps India Limited

Natural Capsules Limited

Sunil Healthcare Limited

United Capz Pvt. Ltd.

Eva Grow Medicaps Private Limited

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Erawat Pharma Limited

PURE CAPS INDIA PVT. LTD.

Uni-Capsule Jiangsu Co., Ltd.

Jiangsu Lefan Capsule Co., Ltd.

Shandong Healsee Capsule Ltd.

Qingdao Yiqing Biotechnology Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Inhalation-Grade Hard Capsules product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Inhalation-Grade Hard Capsules, with price, sales quantity, revenue, and global market share of Inhalation-Grade Hard Capsules from 2021 to 2026.

Chapter 3, the Inhalation-Grade Hard Capsules competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by

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landscape contrast.

Chapter 4, the Inhalation-Grade Hard Capsules breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Inhalation-Grade Hard Capsules market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Inhalation-Grade Hard Capsules.

Chapter 14 and 15, to describe Inhalation-Grade Hard Capsules sales channel, distributors, customers, research findings and conclusion.

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