

US Generic Injectables Market Report by Therapeutic Area (Oncology, Anesthesia, Anti-Infectives, Parenteral Nutrition, Cardiovascular), Container (Vials, Ampoules, Premix, Prefilled Syringes), Distribution Channel (Hospitals, Retail Pharmacy) 2024-2032

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Abstracts

The US generic injectables market size reached US\$ 19.9 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 44.6 Billion by 2032, exhibiting a growth rate (CAGR) of 9.1% during 2024-2032. The increasing demand for cost-effective healthcare, the upcoming expiration of patent drugs, and the implementation of favorable initiatives to encourage the use of generic drugs, including injectables are among the key factors driving the market growth.

Generic injectables, also known as generic sterile injectable drugs, are pharmaceutical products that are equivalent to their branded counterparts in terms of active ingredients, dosage form, strength, route of administration, quality, safety, and efficacy. These medications are administered through injection and are used for various therapeutic purposes, including the treatment of acute and chronic conditions. Generic injectables are produced after the expiration of patents held by the original brand-name drug manufacturers. Once the patent protection ends, other pharmaceutical companies can develop and manufacture generic versions of the injectable drug. These generic versions undergo rigorous testing and approval processes by regulatory authorities, such as the U.S. Food and Drug Administration (FDA), to ensure their safety, effectiveness, and quality.

The market is primarily driven by the increasing prevalence of chronic diseases. Chronic diseases such as cancer, diabetes, and cardiovascular diseases require long-term treatment, often involving injectable medications. The growing prevalence of these

diseases in the US population drives the demand for injectables, including generic versions as generic injectables offer a cost-effective solution for managing chronic conditions. In addition, the US population is aging, leading to an increased demand for healthcare services, including injectable medications. As the elderly population grows, there is a higher incidence of age-related conditions that require injectable treatments. Moreover, generic injectables manufacturers are expanding their manufacturing capabilities, both in the US and globally. This increased capacity allows for a wider range of generic injectables to be produced and supplied to the US market. The availability of a diverse portfolio of generic injectables is also propelling the market growth.

US Generic Injectables Market Trends/Drivers:

The increasing demand for cost-effective healthcare

The rising healthcare costs in the US have put a strain on patients and healthcare systems. Generic injectables offer a more affordable alternative to branded injectable drugs. By choosing generic injectables, patients can save on their out-of-pocket expenses, while healthcare systems and insurance providers can reduce their overall healthcare expenditures. The cost savings associated with generic injectables contribute to increased adoption and utilization in the healthcare system. Moreover, generic injectables enhance access to essential drugs by offering more affordable options. This is particularly beneficial for patients who may face financial barriers in accessing branded drugs. With a wider availability of cost-effective generic injectables, more patients can access the medications they need, improving overall healthcare outcomes.

Patent expirations of branded drugs

Generic injectables are similar in terms of active ingredients, dosage form, strength, and route of administration to the branded drugs. The expiration of patents allows generic manufacturers to introduce affordable alternatives, providing patients and healthcare providers with a wider range of options. Moreover, the introduction of generic injectables following patent expirations improves access to medications. Branded drugs can be prohibitively expensive for some patients, leading to limited access and potential gaps in treatment. Generic injectables provide a more affordable option, ensuring that patients have access to essential medications. Improved access to medications can lead to better health outcomes and overall patient satisfaction.

The implementation of government initiatives

Government initiatives, particularly those implemented by regulatory authorities like the U.S. Food and Drug Administration (FDA), aim to streamline the approval process for generic drugs, including generic injectables. These initiatives often include measures to expedite the review and approval of generic products, reducing the time and cost required for manufacturers to bring their generic injectables to market. Moreover, government initiatives often focus on promoting price transparency and implementing reimbursement policies that encourage the use of cost-effective medications, including generic injectables. These policies may involve preferential reimbursement for generic drugs or the establishment of formularies that prioritize the use of generic injectables. By incentivizing the adoption of cost-effective options, government initiatives help drive the demand for generic injectables in the market.

US Generic Injectables Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the US generic injectables market report, along with forecasts for the period 2024-2032. Our report has categorized the market based on therapeutic area, container, and distribution channel.

Breakup by Therapeutic Area:

- Oncology
- Anesthesia
- Anti-Infectives
- Parenteral Nutrition
- Cardiovascular

Oncology represents the leading application segment

The report has provided a detailed breakup and analysis of the market based on the therapeutic area. This includes oncology, anesthesia, anti-infectives, parenteral nutrition, and cardiovascular. According to the report, oncology represented the largest segment.

Cancer is a significant health concern globally, including in the United States. The high prevalence of cancer creates a substantial demand for oncology treatments, including injectable medications. Oncology injectables are used in various cancer therapies, such as chemotherapy, immunotherapy, and targeted therapy. As the incidence of cancer continues to rise, the demand for oncology injectables increases accordingly. Moreover, cancer treatment can be financially burdensome for patients and healthcare systems.

Generic oncology injectables provide cost savings compared to branded counterparts, allowing for more affordable cancer care. As cost considerations play a significant role in cancer treatment decisions, the availability of cost-effective generic oncology injectables has fueled their demand and market growth.

Breakup by Container:

Vials

Ampoules

Premix

Prefilled Syringes

Vials account for the majority of the market share

A detailed breakup and analysis of the market based on the container has also been provided in the report. This includes vials, ampoules, premix, and prefilled syringes. According to the report, vial accounted for the largest market share.

Vials are highly versatile and compatible with a wide range of injectable medications. They can accommodate various formulations, including liquid solutions, suspensions, and lyophilized (freeze-dried) powders, making them suitable for a diverse range of drugs. Vials can be used for both small molecule drugs and biologics, further increasing their applicability in the market. Moreover, vials have been widely accepted and approved by regulatory authorities, such as the U.S. Food and Drug Administration (FDA), for packaging injectable drugs. They meet stringent quality and stability requirements to ensure the integrity and shelf life of the medications. The established regulatory acceptance and stability of vials make them a preferred choice for generic injectable manufacturers.

Breakup by Distribution Channel:

Hospitals

Retail Pharmacy

Generic injectables are widely distributed through hospitals

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes hospitals and retail pharmacy. According to the report, hospitals accounted for the largest market share.

Hospitals often have centralized drug procurement systems that enable efficient purchasing and inventory management. By including generic injectables in their formularies and procurement processes, hospitals can optimize their drug supply chain and ensure a steady and reliable stock of medications. This centralized approach facilitates cost-effective procurement, volume discounts, and streamlines the distribution of generic injectables. Moreover, hospitals maintain formularies, which are lists of approved medications that healthcare providers can prescribe to patients within the institution. Formularies often include a mix of brand-name and generic medications, with an emphasis on cost-effectiveness, thus increasing the market share of hospitals.

Competitive Landscape:

At present, key players are focusing on expanding their portfolio of generic injectables across a wide range of therapeutic areas. They are also investing in research and development (R&D) activities to identify and develop new generic injectables. Moreover, many key players are engaging in strategic partnerships, collaborations, and acquisitions to strengthen their market foothold. These partnerships also involve licensing agreements, joint ventures, or distribution agreements with other companies to enhance their product offerings and expand their geographic reach. Besides, key players are expanding their manufacturing capacities to meet the increasing demand for generic injectables. This includes setting up new production facilities, enhancing existing facilities, and adopting advanced manufacturing technologies.

The report has also provided a comprehensive analysis of the competitive landscape in the market. Some of the companies covered in the report include:

Hospira (Pfizer Inc.)
Hikma Pharmaceuticals PLC
Fresenius Kabi AG
Sagent Pharmaceuticals, Inc
Sandoz (Novartis).
Henry Shein Inc.

Recent Developments:

Sandoz received FDA approval for its generic version of Sandostatin LAR (octreotide acetate for injectable suspension), a long-acting injectable medication used for the treatment of acromegaly, a hormonal disorder.

Fresenius Kabi launched a generic version of isoproterenol hydrochloride injection, a medication used for the treatment of bradycardia (slow heart rate) and heart block.

Pfizer Inc. launched biosimilars, including injectables such as Trazimera (trastuzumab), a biosimilar to Herceptin, used for the treatment of HER2-positive breast cancer.

Key Questions Answered in This Report

1. What was the size of the US generic injectables market in 2023?
2. What is the expected growth rate of the US generic injectables market during 2024-2032?
3. What has been the impact of COVID-19 on the US generic injectables market?
4. What are the key factors driving the US generic injectables market?
5. What is the breakup of the US generic injectables market based on the therapeutic area?
6. What is the breakup of the US generic injectables market based on the containers?
7. What is the breakup of the US generic injectables market based on the distribution channel?

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