

Drug Delivery Systems (DDS) Global Market - Forecast to 2027

<https://marketpublishers.com/r/D31CD3F4AFBAEN.html>

Date: July 2021

Pages: 693

Price: US\$ 4,950.00 (Single User License)

ID: D31CD3F4AFBAEN

Abstracts

Drug Delivery Systems (DDS) are the advanced formulations or technologies that modulate the release profile of therapeutic or prophylactic agents, their absorption, distribution and elimination characteristics to achieve the desired therapeutic effect and enhance the safety profile, patient convenience and compliance to medications or vaccines. The drug delivery systems integrated into the drug dosage formulations control the drug release kinetics, duration of drug action, site of drug action and the concentration profile or bioavailability of the drug. The necessity to address the various challenges in delivery needs attributed to the expansion of therapeutic modalities from the primary class of small molecules to the current new generation of therapeutics, namely the highly varied and complex biotherapeutics, the need to overcome the limitations of the free or conventional active therapeutic or prophylactic moiety and to protect them or enable them to overcome the intrinsic harsh biological environment to induce their potential therapeutic or prophylactic effect are boosting the drug delivery systems market growth.

As estimated by IQ4I analysis, drug delivery systems global market is expected to reach \$158,006.4 million by 2027 growing at a mid single digit CAGR from 2020 to 2027 due to escalating necessity of targeted and controlled drug delivery systems to increase the therapeutic efficiency and safety profile of medications, need for efficient biologics delivery systems, requirement of novel drug delivery systems for satisfying the therapeutic variations of elderly and pediatric population, increasing R&D expenditure of innovator pharma or biopharma companies and their cost-efficient patent ever-greening strategy either through incremental innovation or through repurposing of drugs by using novel drug delivery systems, the vast drug delivery technology enhanced product pipeline, the trend of acquisitions and collaboration agreements in the drug delivery system industry and persistently increasing prevalence of infectious and non-infectious

diseases in need of better, efficient and safer prophylactics and therapeutics.

The drug delivery systems global market is categorized into various market segments based on the Route of administration, Product, drug molecule type, mechanism, application and geography. Based on the route of administration, the drug delivery systems market is segmented into oral drug delivery systems, parenteral drug delivery systems, topical drug delivery systems and pulmonary or inhalation drug delivery systems. Among these, oral drug delivery systems is the largest and fastest emerging drug delivery systems segment and is expected to grow at a mid single digit CAGR during the forecasted period due to the increasing adoption of oral drug delivery technology enhanced drug products by the value-centric patients across the globe and the elevating inclination of patients especially the geriatric and pediatric patients towards the most convenient, easier, self-administratable, painless and non-invasive drug delivery route.

The drug delivery systems market, based on product has been classified as Lipid based drug delivery systems (LBDDS) consisting of lipid emulsion drug delivery systems, lipid vesicular drug delivery systems (classified further as liposomes and other vesicular drug delivery systems) and lipid particulate systems (consisting of lipospheres, solid lipid nanoparticles (SLNs), solid lipid microparticles (SLMs), nanostructured lipid carriers (NLCs) and Lipid drug conjugates (LDCs)), Polymeric Drug Delivery Systems consisting of polymer-drug conjugates (PDCs), polymeric nanoparticles, Enzyme based drug delivery systems, hydrogels, and other polymeric drug delivery systems comprised of microspheres, micelles or dendrimers and Viral vectors and other drug delivery systems consisting of cellular drug delivery systems like resealed erythrocytes, inorganic or metallic nanoparticle drug delivery systems and plasmid DNA vectors. Among these, the polymeric drug delivery systems segment accounted for the largest revenue in 2020 and is expected to grow at a low single digit CAGR from 2020 to 2027. Viral vectors and other drug delivery systems segment is the fastest emerging segment and is expected of growing at an exponential CAGR during the forecasted period. Lipid based drug delivery systems can be broadly classified as lipid emulsion drug delivery systems, lipid vesicular drug delivery systems and lipid particulate drug delivery systems. Among these, lipid particulate drug delivery systems segment is the largest and fastest emerging segment and is expected to grow at a mid single digit CAGR during the forecasted period. The most popular lipid vesicular drug delivery system, liposome's global market is expected to grow at a high single digit CAGR from 2020 to 2027. The Polymeric Drug delivery systems market is segmented further into polymer-drug conjugates (PDC) and antibody drug conjugates (ADC), polymeric nanoparticles, enzyme based drug delivery systems, hydrogel drug delivery systems and other

polymeric drug delivery systems comprised of dendrimers, micelles and microspheres. Among these, polymer drug conjugates segment holds the largest share of revenue in 2020 and is expected to grow at a low single digit CAGR from 2020 to 2027. Polymeric nanoparticles drug delivery segment is the fastest emerging segment and is expected of growing at a mid single digit CAGR from 2020 to 2027.

Based on the type of drug molecule being delivered, the drug delivery systems global market is classified into small molecule drug delivery systems and large molecule drug delivery systems. Among these, the small molecule drug delivery systems segment accounted for the largest revenue in 2020 and is expected to grow at a low single digit CAGR from 2020 to 2027. Large molecule drug delivery system segment is the fastest emerging segment and is expected of growing at a mid single digit CAGR from 2020 to 2027.

The drug delivery systems market, based on mechanism has been segmented into Rate Pre-Programmed Drug Delivery Systems, Targeted or site-specific Drug Delivery Systems and Stimuli responsive Drug Delivery Systems. Among these, the Rate Pre-programmed drug delivery systems segment accounted for the largest revenue in 2020 and is expected to grow at a mid single digit CAGR from 2020 to 2027. Targeted or site-specific drug delivery system segment is the fastest emerging segment and is expected of growing at a mid single digit CAGR during the forecasted period.

The Drug Delivery Systems global market based on application has been grouped into Oncology, Infectious diseases, Central Nervous System (CNS) Disorders, Metabolic Disorders, Autoimmune disorders, Respiratory diseases, Ophthalmology, Cardiovascular diseases and other applications consisting of Hematological diseases, Rare diseases and Genetic disorders, Hormonal disorders, Dermatological disorders and Wound Healing. Among these, Oncology segment is the largest and fastest emerging segment and is expected to grow at a mid single digit CAGR from 2020 to 2027 due to the persistently escalating cancer patients across the globe, elevated adoption rate of the large number of oncological drug products incorporated with drug delivery systems and the huge number of research studies being carried out for the development of safer, patient compliant and efficient oncological medications through the utilization of novel drug delivery systems.

The drug delivery systems global market is divided into four major geographies namely, North America, Europe, Asia Pacific (APAC) and Rest of World (ROW). The major share of the global market is occupied by North America in 2020 and is expected to grow at a mid single digit CAGR from 2020 to 2027 mainly due to persistently elevating

chronic and infectious disease patient burden in the region, the ever inflating pharmaceutical market in the region and escalating demand for value-based therapeutics or prophylactics from the patient base of the region, elevating geriatric and pediatric patient pool with varied therapeutic requirements in the region, presence of huge number of pharma and biotech companies in the region and their increasing research and development spendings for the development of therapeutically efficient and safer medications through the utilization of drug delivery systems and the various strategies of pharma companies to economically maintain their market exclusivity through the utilization of novel drug delivery systems. Asia-Pacific (APAC) is the fastest emerging region and is expected of growing at a mid single digit CAGR during the forecasted period. The rapid market growth rate in this region is due to constantly elevating communicable and non-communicable disease patient pool in the region, the growing pharmaceutical market and the pharmaceutical and biotech formulation services sector in the region and the increasing awareness and demand for value-enhanced therapeutics or prophylactics from the patient base of the region, escalating geriatric and pediatric patient pool with varied therapeutic requirements in the region and growing economies of most of the countries in the region.

According to IQ4I analysis, the carrier linked prodrugs global market is expected to grow at a mid single digit CAGR from 2020 to 2027 due to the potential of carriers in realizing the envisioned therapeutic effects of the pharmaceutical agent. The nanotechnology enabled drug delivery systems global market is expected to grow at a mid single digit CAGR from 2020 to 2027 due to the potential of nano-drug delivery systems to improve the delivery and bioavailability of poorly water soluble therapeutics, to enhance the site-specific delivery of medications and to modify the release behavior of pharmaceutical agents.

The drug delivery enabling technology, product or service providers market is fragmented with the top players occupying minor share of the market and the remaining major share of the market being occupied by other players. The top five players occupy minor share of the market and the remaining major share of the market is occupied by other players. The top players in drug delivery enabling technology, product or service providers market are Thermo fisher Scientific Inc. (Patheon) (U.S.), Lonza Group Ltd. (Switzerland), Catalent, Inc. (U.S.), Merck KGaA (Germany), Evonik Industries (Germany), Halozyme Therapeutics Inc. (U.S.), Ligand Pharmaceuticals Incorporated (U.S.), Mitsubishi Chemical Holdings Corporation (Qualicaps CO. Ltd.) (Japan), Fujifilm Holdings Corporation (Japan), ACG (Associated Capsule Group) Worldwide (India) and others. The drug delivery system enhanced drug product providers market is consolidated with the few pharmaceutical players dominating and occupying major

share of the market and the remaining minor share of the market being occupied by other players. The top five pharmaceutical players occupy majority of the market share and the remaining minority share of the market is occupied by other players. The top players in drug delivery enhanced product providers market are Johnson and Johnson (U.S.), Gilead Sciences Inc. (U.S.), F. Hoffmann-La Roche AG (Switzerland), Abbvie Inc. (U.S.), Takeda Pharmaceutical Company (Japan), Astellas Pharma (Japan), Biogen (U.S.), Pfizer Inc. (U.S.), Abbvie Inc. (U.S.), Amgen Inc. (U.S.), Novartis AG (Switzerland) and others. The drug delivery system enhanced product providers market is consolidated with the top five pharmaceutical players occupying 60.9% of the market share and the remaining 39.1% of the market being occupied by other players. The top players in drug delivery enhanced product providers market are Johnson and Johnson (U.S.), Gilead Sciences Inc. (U.S.), F. Hoffmann-La Roche AG (Switzerland), Abbvie Inc. (U.S.), Takeda Pharmaceutical Company (Japan), Astellas Pharma (Japan), Biogen (U.S.), Pfizer Inc. (U.S.), Abbvie Inc. (U.S.), Amgen Inc. (U.S.), Novartis AG (Switzerland) and others.

The report provides an in-depth market analysis of the above-mentioned segments across the following regions:

North America

U.S.

Rest of North America

Europe

Germany

France

Italy

Rest of Europe

Asia-Pacific

China

Japan

India

Rest of APAC

Rest of the World (RoW)

Brazil

Rest of LATAM

Middle East and Africa

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