

# Global 10-Deacetylbaccatine III Market Growth 2026-2032

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## Abstracts

The global 10-Deacetylbaccatine III market size is predicted to grow from US\$ 77.28 million in 2025 to US\$ 150 million in 2032; it is expected to grow at a CAGR of 10.1% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "10-Deacetylbaccatine III Industry Forecast" looks at past sales and reviews total world 10-Deacetylbaccatine III sales in 2025, providing a comprehensive analysis by region and market sector of projected 10-Deacetylbaccatine III sales for 2026 through 2032. With

10-Deacetylbaccatine III sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world 10-Deacetylbaccatine III industry.

This Insight Report provides a comprehensive analysis of the global 10-Deacetylbaccatine III landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on 10-Deacetylbaccatine III portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global 10-Deacetylbaccatine III market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for 10-Deacetylbaccatine III and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global 10-Deacetylbaccatine III.

This report presents a comprehensive overview, market shares, and growth opportunities of 10-Deacetylbaccatine III market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

~95%

~98.0%

Others

#### Segmentation by Production Source:

Natural Extraction

Cell Culture/Fermentation Source

Semi-synthetic/Conversion Method

### Segmentation by Impurity Control Level:

Pharmacopoeia Grade

High Purity Grade

Industrial Grade

### Segmentation by Application:

Production of Docetaxel

Production of Paclitaxel

Others

### This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Phyton Biotech

Deccan Nutraceuticals

Alchem International

Indena

South Pharmaceutical

Sai Phytoceuticals

Sarv Biolabs Pvt

Aphios

Taxus Pharma

Yunnan Hande

Kavya Pharma

Jinhe

#### Key Questions Addressed in this Report

What is the 10-year outlook for the global 10-Deacetylbaccatine III market?

What factors are driving 10-Deacetylbaccatine III market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do 10-Deacetylbaccatine III market opportunities vary by end market size?

How does 10-Deacetylbaccatine III break out by Type, by Application?

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