

Active Pharmaceutical Ingredient Market by Type (Innovative, Generic), Manufacturer (captive, merchant), Synthesis (Synthetic, Biotech), Products (mAb, Hormones, Cytokines), Drug (OTC, Rx), Application (Diabetes, oncology, CVD) - Global Forecast to 2029

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Abstracts

The global active pharmaceutical ingredients market is projected to reach USD 238.3 billion by 2029 from USD 163.5 billion in 2024, at a CAGR of 7.8% during the forecast period of 2024 to 2029. The growth of this market can be attributed to the increasing research and development activities for the development of novel biopharmaceuticals. Biopharmaceuticals are manufactured by using living biological systems. They have become popular as they are similar to natural biological compounds found in the human body, thus offering higher efficacy and fewer side effects. Continued research in the field of biologics has resulted in the development of novel products and advancements in existing treatment models. Currently, novel concepts such as gene therapy (offering regenerative medicine) and cell therapy (for cancer treatment) are being refined. This has made biopharmaceuticals a huge and attractive opportunity area in the active pharmaceutical ingredients market. Biopharmaceuticals are currently the fastest-growing segment of the pharmaceutical industry, expected to register a double-digit growth rate in the coming decade. Their efficacy and safety, combined with their ability to address previously untreatable conditions, allow pharmaceutical companies to command high prices for these innovative drugs. Currently, a majority of blockbuster drugs are biopharmaceuticals. According to PharmaVoice report in 2023, pharmaceutical's biggest blockbusters included Merck & Co.'s Keytruda, Pfizer and BioNTech's COVID-19 vaccine Comirnaty, and AbbVie's powerhouse Humira.

“The pharmaceutical & biotechnology industry segment accounted for the largest share by end user during the forecast period.”

In 2023, The pharmaceutical and biotechnology industry is a significant end user group of Active Pharmaceutical Ingredients (APIs) for drug development and manufacturing. Pharmaceutical companies utilize APIs as the primary component in their drug formulations. These compounds provide the therapeutic effects of the medication. They procure APIs to produce finished dosage forms, such as tablets, capsules, or injectables. Biotechnology firms focus on developing biologic drugs, which are derived from living organisms. These drugs typically involve complex molecules, proteins, or antibodies. Growing collaboration by pharmaceutical and biotechnology companies with API providers is one of the factors supporting market growth. For instance, in December 2022, Eli Lilly and Company and EVA Pharma collaborated through which Eli Lilly committed to supply its active pharmaceutical ingredient (API) for insulin at a significantly reduced price to EVA Pharma. Additionally, as the need for the development of novel treatments is growing, the pharmaceutical and biotechnology industry is focused on continuously innovating in this field. This is further expected to support market growth.

“Europe: The second largest region in the active pharmaceutical ingredients market.”

Europe accounted for the second-largest market for active pharmaceutical ingredients market after North America. The European active pharmaceutical ingredients market has witnessed significant growth in recent years, driven by demographic changes, such as the growing incidence of chronic diseases. This is attributed to the rising geriatric population in the region. As per the European Commission, by 2025, more than 20% of Europeans are expected to be 65 years and above, with a rapid increase in the number of people aged 80 years and above, indicating strong demand growth for healthcare facilities and disease diagnostics services. This will drive pharmaceutical and biopharmaceutical clinical trial activity for novel drug discoveries and directly contribute to the growth of associated markets, such as active pharmaceutical ingredients.

The primary interviews conducted for this report can be categorized as follows:

By Respondent: Supply Side- 70% and Demand Side 30%

By Designation: Managers - 45%, CXOs and Directors-level - 30%, and Executives - 25%

By Region: North America -40%, Europe -25%, Asia-Pacific -20%, Latin America- 10%, and Middle East and Africa- 5%

List of Companies Profiled in the Report:

Pfizer Inc. (US)

Teva Pharmaceutical Industries Ltd. (Israel)

GSK PLC (UK)

Sanofi (France)

Viartis Inc. (US)

Divi's Laboratories Limited (India)

Sandoz Group AG (Switzerland)

Boehringer Ingelheim International GmbH (US)

SK Inc. (US)

Eli Lilly and Company (US)

Merck KGaA (US)

AbbVie Inc. (US)

F. Hoffmann-La Roche Ltd. (Switzerland)

AstraZeneca (UK)

Dr. Reddy's Laboratories Ltd. (India)

Sun Pharmaceutical Industries Ltd. (India)

Cipla (India)

Aurobindo Pharma (India)

Evonik Industries AG (Germany)

Hikma Pharmaceuticals PLC (UK)

BASF SE (Germany)

Alembic Pharmaceuticals Limited (India)

Aburaihan Pharmaceutical Company (Iran)

Curia Global, Inc. (US)

Cambrex Corporation (US)

API Pharma Tech (US)

Sreepathi Pharmaceuticals Limited (India)

Shilpa Medicare Limited (India)

Nanjing Jianyou Biochemical Pharmaceutical Co., Ltd. (China)

Hovione (Portugal)

ChemCon GmbH (Germany)

Pharco (Egypt)

Research Coverage:

This report provides a detailed picture of the active pharmaceutical ingredients market. It aims at estimating the size and future growth potential of the market across different segments such as the type, synthesis, type of drug, potency, therapeutic applications, end user and region. The report also includes an in-depth competitive analysis of the key market players along with their company profiles recent developments and key

market strategies. Market evaluation framework, market share analysis, revenue analysis, company evaluation matrix for the top 32 companies, SME/start-up evaluation matrix, company footprint, competitive benchmarking of SMEs/start-ups, competitive scenario, and valuation & financial metrics of key vendors have been updated in the competitive landscape chapter of the report.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants by providing them with the closest approximations of the revenue numbers for the overall market and its subsegments. It will also help stakeholders better understand the competitive landscape and gain more insights to better position their business and make suitable go-to-market strategies. This report will enable stakeholders to understand the market's pulse and provide them with information on the key market drivers, restraints, opportunities, and challenges

The report provides insights on the following pointers:

Analysis of key drivers (Production capacity expansion in pharmaceutical and biopharmaceutical companies, Growing adoption of generic drugs, Increasing uptake of biopharmaceuticals and Technological advancements in API manufacturing), restraints (Complications during API manufacturing, Low profit margins and high manufacturing costs), opportunities (Increased use of highly potent active pharmaceutical ingredients, and Potential growth opportunities in emerging economies), and challenges (Rising penetration of counterfeit drugs and Stringent regulatory requirements for API manufacturing).

Product Development/Innovation: Detailed insights on newly launched product and technological assessment of the active pharmaceutical ingredients market

Market Development: Comprehensive information about lucrative markets - the report analyses the market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the active pharmaceutical ingredients market

Competitive Assessment: In-depth assessment of market shares, technology analysis, investment and funding scenario, company footprint analysis, growth strategies and product offerings of leading players like Pfizer Inc. (US), Teva

Pharmaceutical Industries Ltd. (Israel), GSK PLC (UK), Sanofi (France), Viatris Inc. (US), Divi's Laboratories Limited (India), Sandoz Group AG (Switzerland), Boehringer Ingelheim International GmbH (US), SK Inc. (US), Eli Lilly and Company (US), Merck KGaA (US), AbbVie Inc. (US), F. Hoffmann-La Roche Ltd. (Switzerland), AstraZeneca (UK), Dr. Reddy's Laboratories Ltd. (India), Sun Pharmaceutical Industries Ltd. (India), Cipla (India), Aurobindo Pharma (India), Evonik Industries AG (Germany), Hikma Pharmaceuticals PLC (UK), BASF SE (Germany), Alembic Pharmaceuticals Limited (India), Aburaihan Pharmaceutical Company (Iran), Curia Global, Inc. (US), Cambrex Corporation (US), API Pharma Tech (US), Sreepathi Pharmaceuticals Limited (India), Shilpa Medicare Limited (India), Nanjing Jianyou Biochemical Pharmaceutical Co., Ltd. (China), Hovione (Portugal), ChemCon GmbH (Germany), and Pharco (Egypt).

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*Details on Business overview, Products/Services/Solutions offered, Recent developments, MnM view, Key strategies, Strategic choices made, and Weaknesses and Competitive threats might not be captured in case of unlisted companies.

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