

# Pharmaceutical Excipients Market by Product (Organic (Oleochemicals, Carbohydrates) Inorganic (Calcium Carbonate), Functionality (Fillers, Binders, Lubricants, Diluents), Formulation (Oral, Parenteral), Application (Stablizers) - Global Forecast to 2028

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## Abstracts

The global pharmaceutical excipients market is projected to reach USD 14.9 Bn by 2028 from USD 10.7 Bn in 2023, at a CAGR of 6.8% during the forecast period of 2023 to 2028. Factors such as the rising pharmaceutical products and generics demand and R&D investments for novel excipient development are predicted to uplift the market in the coming years. Additionally, partnerships and collaboration with pharmaceutical companies and increased emphasis on patient-centric formulations will provide lucrative market growth. However, regulatory stringency and steep development costs are predicted to restrict the market.

“The fillers & diluents functionality held the dominant share in the pharmaceutical excipients market.”

Based on functionality, the global pharmaceutical excipients market is segmented into binders, suspending & viscosity agents, fillers & diluents, flavoring agents & sweeteners, colorants, coating agents, lubricants & glidants, preservatives, disintegrants, emulsifying agents, and other functionalities. The growing demand for fillers and diluents in the development and production of solid oral drugs is expected to drive the expansion of the fillers and diluents market. For manufacturers, fillers and diluents provide stability and facilitate preparation, packaging, shipping, and dispensing. For patients, they enhance the palatability of the formulation and simplify administration and handling of the medication.

“Oral formulations segment accounted for the largest share of the formulations segment in 2022.”

Based on formulations, the pharmaceutical excipients market is segmented into oral formulations, topical formulations, parenteral formulations and other formulations. In 2022, the oral formulations segment accounted for the largest share of the pharmaceutical excipients market. The rapidly growing biopharmaceutical and generics industries are the primary drivers of growth for the pharmaceutical excipients market. Additionally, the oral route of administration is the most prevalent and traditional mode of drug delivery, which has also contributed to the segment's growth.

“Asia Pacific region is likely to grow at a faster pace.”

The pharmaceutical excipients market is segmented into North America, Europe, Asia Pacific, Latin America, Middle East and Africa. Asia Pacific region is anticipated to grow at a significant CAGR during the forecast period. Low-cost manufacturing advantage, low regulatory stringency, and increasing per capita income support the growth of the pharmaceutical excipients market in the region.

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

By Respondent: Supply Side- 80%, and Demand Side - 20%

By Designation (Supply Side): Managers - 45%, CXOs & Directors - 30%, Executives- 25%

By Region: North America -20%, Europe -10%, Asia-Pacific -55%, Latin America -10%, MEA- 5%

List of Companies Profiled in the Report:

International Flavors & Fragrances Inc. (US)

Ashland Inc. (US)

Evonik Industries AG (Germany)

BASF SE (Germany)

Kerry Group plc (Ireland)

Roquette Frères (France)

MERCK KGaA (Germany)

Associated British Foods plc (UK)

ADM (US)

Wacker Chemie AG (Germany)

Air Liquide (France)

DOW (US)

Berkshire Hathaway Inc. (US)

Colorcon (US)

DFE PHARMA (Germany)

Innophos (US)

JRS PHARMA (Germany)

Actylis (US)

Meggle GmbH & Co Kg (Germany)

Corel Pharma Chem. (India)

Biogrand GmbH (Germany)

Nitika Pharmaceutical Specialities Pvt. Ltd. (India)

BENEO (Germany)

Fuji Chemical Industries Co., Ltd. (Japan)

R.T. Vanderbilt Holding Company, Inc. (US)

#### Research Coverage:

This report provides a detailed picture of the pharmaceutical excipients market. It aims to estimate the size and future growth potential of the market across different segments, such as product, functionality, formulation, functionality application 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.

#### 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 pharmaceutical excipients 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 (Increasing demand for generic drugs and pharmaceutical products, increased R&D Investments for the development of novel excipients, growing emphasis on patient-centric formulations, collaborations and partnerships with pharmaceutical companies), restraints (Stringent Regulatory Requirements, High Development Costs), opportunities (Rising demand for functional/multifunctional pharmaceutical excipients, advancements in nanotechnology, emerging markets in Asia-Pacific and Latin America) and challenges (Safety & quality concerns, limited availability of certain raw materials) are influencing the growth of pharmaceutical excipients market.

**Product Development/Innovation:** Detailed insights on newly launched products of the pharmaceutical excipients market.

**Functionality Application:** Additional segment provided for functionality

applications where segregation has been provided based on the applications of various excipients highlights the various uses of different excipients classes.

**Market Development:** Comprehensive information about lucrative markets – the report analyses the pharmaceutical excipients market across varied regions.

**Market Diversification:** Exhaustive information about new services, untapped geographies, recent developments, and investments in the pharmaceutical excipients market.

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and service offerings of leading players include International Flavors & Fragrances Inc. (US), Ashland Inc. (US), Evonik Industries AG (Germany), BASF SE (Germany), Kerry Group plc (Ireland), Roquette Frères (France), MERCK KGaA (Germany), Associated British Foods plc (UK), ADM (US), Wacker Chemie AG (Germany) and among others in the pharmaceutical excipients market.

## Contents

### 1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
  - 1.2.1 INCLUSIONS AND EXCLUSIONS
- 1.3 MARKET SCOPE
  - 1.3.1 MARKETS COVERED
  - 1.3.2 YEARS CONSIDERED
  - 1.3.3 CURRENCY CONSIDERED
- 1.4 STAKEHOLDERS
- 1.5 SUMMARY OF CHANGES
  - 1.5.1 RECESSION IMPACT

### 2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
  - FIGURE 1 RESEARCH DESIGN
    - 2.1.1 SECONDARY DATA
    - 2.1.2 PRIMARY DATA
  - FIGURE 2 BREAKDOWN OF PRIMARIES
- 2.2 MARKET SIZE ESTIMATION
  - FIGURE 3 MARKET SIZE ESTIMATION: PHARMACEUTICAL EXCIPIENTS MARKET (2022)
  - FIGURE 4 APPROACH 1: REVENUE SHARE ANALYSIS
  - FIGURE 5 REVENUE SHARE ANALYSIS OF INTERNATIONAL FLAVORS & FRAGRANCES INC.: PHARMACEUTICAL EXCIPIENTS MARKET (2022)
    - 2.2.1 PRIMARY INSIGHTS
  - FIGURE 6 MARKET VALIDATION FROM PRIMARY EXPERTS
    - 2.2.2 SEGMENTAL ASSESSMENT: PHARMACEUTICAL EXCIPIENTS MARKET
  - FIGURE 7 MARKET SIZE ESTIMATION: TOP-DOWN APPROACH
- 2.3 GROWTH RATE ASSUMPTIONS
  - FIGURE 8 CAGR PROJECTION: PHARMACEUTICAL EXCIPIENTS MARKET
  - FIGURE 9 GROWTH ANALYSIS OF DRIVERS, RESTRAINTS, CHALLENGES, AND OPPORTUNITIES
- 2.4 MARKET BREAKDOWN & DATA TRIANGULATION
  - FIGURE 10 DATA TRIANGULATION METHODOLOGY
- 2.5 STUDY ASSUMPTIONS

2.6 RESEARCH LIMITATIONS

2.7 RISK ANALYSIS

2.8 RECESSION IMPACT: PHARMACEUTICAL EXCIPIENTS MARKET

TABLE 1 GLOBAL INFLATION RATE PROJECTION, 2021–2028 (% GROWTH)

TABLE 2 US HEALTH EXPENDITURE, 2019–2022 (USD MILLION)

TABLE 3 US HEALTH EXPENDITURE, 2023–2027 (USD MILLION)

### **3 EXECUTIVE SUMMARY**

FIGURE 11 PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2023 VS. 2028 (USD MILLION)

FIGURE 12 PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2023 VS. 2028 (USD MILLION)

FIGURE 13 PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2023 VS. 2028 (USD MILLION)

FIGURE 14 PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2023 VS. 2028 (USD MILLION)

FIGURE 15 PHARMACEUTICAL EXCIPIENTS MARKET: GEOGRAPHICAL SNAPSHOT

### **4 PREMIUM INSIGHTS**

4.1 PHARMACEUTICAL EXCIPIENTS MARKET OVERVIEW

FIGURE 16 GROWTH IN GENERICS AND PHARMACEUTICAL PRODUCT DEMAND TO DRIVE MARKET GROWTH

4.2 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET

FIGURE 17 ORGANIC CHEMICALS HELD LARGEST SHARE OF NORTH AMERICAN MARKET IN 2022

4.3 PHARMACEUTICAL EXCIPIENTS MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES

FIGURE 18 CHINA TO REGISTER HIGHEST GROWTH DURING FORECAST PERIOD

### **5 MARKET OVERVIEW**

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 19 PHARMACEUTICAL EXCIPIENTS MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

**TABLE 4 PHARMACEUTICAL EXCIPIENTS MARKET: IMPACT ANALYSIS****5.2.1 DRIVERS**

5.2.1.1 Increasing demand for generic drugs and pharmaceutical products

**TABLE 5 BRAND NAMES AND GENERIC COUNTERPARTS**

5.2.1.2 Increased R&D investments to develop novel excipients

**FIGURE 20 GLOBAL PHARMACEUTICAL DRUG SALES (2008–2022)**

5.2.1.3 Growing emphasis on patient-centric formulations to fuel demand for specialized excipients

5.2.1.4 Collaborations and partnerships with pharmaceutical companies for customized excipient solutions

**5.2.2 RESTRAINTS**

5.2.2.1 Stringent regulatory requirements

5.2.2.2 High development costs

**5.2.3 OPPORTUNITIES**

5.2.3.1 Rising demand for functional/multifunctional pharmaceutical excipients

**TABLE 6 MULTIFUNCTIONAL EXCIPIENTS**

5.2.3.2 Advancements in nanotechnology

5.2.3.3 Emerging markets in Asia Pacific and Latin America

**5.2.4 CHALLENGES**

5.2.4.1 Safety and quality concerns

5.2.4.2 Limited availability of certain raw materials used in excipient production

**5.3 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES****FIGURE 21 REVENUE SHIFT AND NEW POCKETS FOR PHARMACEUTICAL EXCIPIENT PROVIDERS****5.4 PRICING ANALYSIS****TABLE 7 PRICING ANALYSIS (USD)****5.5 VALUE CHAIN ANALYSIS****FIGURE 22 PHARMACEUTICAL EXCIPIENTS MARKET: VALUE CHAIN ANALYSIS****FIGURE 23 PHARMACEUTICAL EXCIPIENTS MARKET: SUPPLY CHAIN ANALYSIS****5.6 ECOSYSTEM/MARKET MAP****FIGURE 24 PHARMACEUTICAL EXCIPIENTS MARKET: ECOSYSTEM/MARKET MAP****TABLE 8 SUPPLY CHAIN ECOSYSTEM****5.7 TECHNOLOGY ANALYSIS****5.8 PATENT ANALYSIS****FIGURE 25 PHARMACEUTICAL EXCIPIENTS MARKET: PATENT ANALYSIS**

5.8.1 LIST OF MAJOR PATENTS

**TABLE 9 PHARMACEUTICAL EXCIPIENTS MARKET: MAJOR PATENTS****5.9 KEY CONFERENCES & EVENTS IN 2023–2024**



**TABLE 10 PHARMACEUTICAL EXCIPIENTS MARKET: DETAILED LIST OF EVENTS AND CONFERENCES****5.10 TRADE DATA****5.10.1 GLYCEROL****TABLE 11 HS CODE: 290545 GLYCEROL****5.10.2 DEXTRINS AND OTHER MODIFIED STARCHES****TABLE 12 HS CODE: 350510 DEXTRINS AND OTHER MODIFIED STARCHES (E.G., PREGELATINIZED OR ESTERIFIED STARCHES)****5.10.3 PROPYLENE GLYCOL****TABLE 13 HS CODE: 290532 PROPYLENE GLYCOL (PROPANE-1,2-DIOL)****5.10.4 CALCIUM CARBONATE****TABLE 14 HS CODE: 283650 CALCIUM CARBONATE****5.10.5 SODIUM CHLORIDE****TABLE 15 HS CODE: 250100 SALTS, INCL. TABLE SALT AND DENATURED SALT, AND PURE SODIUM CHLORIDE, WHETHER OR NOT IN AQUEOUS SOLUTION OR CONTAINING ADDED ANTI-CAKING OR FREE-FLOWING AGENTS; SEA WATER****5.10.6 MANNITOL****TABLE 16 HS CODE: 290543 MANNITOL****5.10.7 CELLULOSE****TABLE 17 HS CODE: 3912 CELLULOSE AND ITS CHEMICAL DERIVATIVES, N.E.S., IN PRIMARY FORMS****5.11 TARIFF AND REGULATORY LANDSCAPE****5.11.1 REGULATORY BODIES, GOVERNMENT AGENCIES AND OTHER ORGANIZATIONS****5.11.1.1 FDA regulations on pharmaceutical excipients****5.11.2 LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****5.11.2.1 North America****TABLE 18 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****5.11.2.2 Europe****TABLE 19 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****5.11.2.3 Asia Pacific****TABLE 20 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS****5.11.2.4 Latin America****TABLE 21 LATIN AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS**

#### 5.11.2.5 Middle East & Africa

TABLE 22 MIDDLE EAST & AFRICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

#### 5.12 PORTER'S FIVE FORCES ANALYSIS

TABLE 23 PHARMACEUTICAL EXCIPIENTS MARKET: PORTER'S FIVE FORCES ANALYSIS

5.12.1 THREAT OF NEW ENTRANTS

5.12.2 THREAT OF SUBSTITUTES

5.12.3 BARGAINING POWER OF BUYERS

5.12.4 BARGAINING POWER OF SUPPLIERS

5.12.5 DEGREE OF COMPETITION

#### 5.13 KEY STAKEHOLDERS AND BUYING CRITERIA

5.13.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 26 INFLUENCE OF COMPANY STAKEHOLDERS IN BUYING PROCESS OF PHARMACEUTICAL EXCIPIENTS

5.13.2 KEY BUYING CRITERIA FOR PHARMACEUTICAL EXCIPIENTS PRODUCTS AMONG END USERS

FIGURE 27 KEY BUYING CRITERIA FOR END USERS

## **6 PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT**

### 6.1 INTRODUCTION

TABLE 24 PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

### 6.2 ORGANIC CHEMICALS

TABLE 25 PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 26 PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY REGION, 2021–2028 (USD MILLION)

TABLE 27 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 28 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 29 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 30 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.1 OLEOCHEMICALS

TABLE 31 OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 32 OLEOCHEMICALS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 33 NORTH AMERICA: OLEOCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 34 EUROPE: OLEOCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 35 ASIA PACIFIC: OLEOCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 36 LATIN AMERICA: OLEOCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.1.1 Fatty alcohols

6.2.1.1.1 Wide usage as nonionic surfactants to drive market

TABLE 37 FATTY ALCOHOLS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 38 NORTH AMERICA: FATTY ALCOHOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 39 EUROPE: FATTY ALCOHOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 40 ASIA PACIFIC: FATTY ALCOHOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 41 LATIN AMERICA: FATTY ALCOHOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.1.2 Mineral stearates

6.2.1.2.1 High adoption of magnesium stearates as excipients in to drive market

TABLE 42 MINERAL STEARATES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 43 NORTH AMERICA: MINERAL STEARATES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 44 EUROPE: MINERAL STEARATES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 45 ASIA PACIFIC MINERAL STEARATES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 46 LATIN AMERICA: MINERAL STEARATES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.1.3 Glycerin

6.2.1.3.1 Extensive applications of glycerin to drive market

TABLE 47 GLYCERIN MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 48 NORTH AMERICA: GLYCERIN MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 49 EUROPE: GLYCERIN MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 50 ASIA PACIFIC: GLYCERIN MARKET, BY COUNTRY, 2021–2028 (USD

MILLION)

TABLE 51 LATIN AMERICA: GLYCERIN MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

6.2.1.4 Other oleochemicals

TABLE 52 OTHER OLEOCHEMICALS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 53 NORTH AMERICA: OTHER OLEOCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 54 EUROPE: OTHER OLEOCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 55 ASIA PACIFIC: OTHER OLEOCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 56 LATIN AMERICA: OTHER OLEOCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

6.2.2 CARBOHYDRATES

TABLE 57 CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 58 CARBOHYDRATES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 59 NORTH AMERICA: CARBOHYDRATES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 60 EUROPE: CARBOHYDRATES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 61 ASIA PACIFIC: CARBOHYDRATES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 62 LATIN AMERICA: CARBOHYDRATES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

6.2.2.1 Sugars

TABLE 63 SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 64 SUGARS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 65 NORTH AMERICA: SUGARS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 66 EUROPE: SUGARS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 67 ASIA PACIFIC: SUGARS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 68 LATIN AMERICA: SUGARS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

6.2.2.2 Actual sugars

6.2.2.2.1 Growing use of actual sugars in pediatric formulations to drive market

TABLE 69 PHARMACEUTICAL EXCIPIENTS MARKET, BY ACTUAL SUGARS, 2021–2028 (USD MILLION)

TABLE 70 ACTUAL SUGARS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 71 NORTH AMERICA: ACTUAL SUGARS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 72 EUROPE: ACTUAL SUGARS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 73 ASIA PACIFIC: ACTUAL SUGARS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 74 LATIN AMERICA: ACTUAL SUGARS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.3 Sugar alcohols

##### 6.2.2.3.1 Mannitol to show highest growth in sugar alcohols market

TABLE 75 PHARMACEUTICAL EXCIPIENTS MARKET, BY SUGAR ALCOHOLS, 2021–2028 (USD MILLION)

TABLE 76 SUGAR ALCOHOLS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 77 NORTH AMERICA: SUGAR ALCOHOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 78 EUROPE: SUGAR ALCOHOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 79 ASIA PACIFIC: SUGAR ALCOHOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 80 LATIN AMERICA: SUGAR ALCOHOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.4 Artificial sweeteners

##### 6.2.2.4.1 Wide usage of aspartame to ensure sustained growth

TABLE 81 ARTIFICIAL SWEETENERS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 82 NORTH AMERICA: ARTIFICIAL SWEETENERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 83 EUROPE: ARTIFICIAL SWEETENERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 84 ASIA PACIFIC: ARTIFICIAL SWEETENERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 85 LATIN AMERICA: ARTIFICIAL SWEETENERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.5 Cellulose

TABLE 86 CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 87 CELLULOSE MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 88 NORTH AMERICA: CELLULOSE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 89 EUROPE: CELLULOSE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 90 ASIA PACIFIC: CELLULOSE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 91 LATIN AMERICA: CELLULOSE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.6 Microcrystalline cellulose

##### 6.2.2.6.1 Microcrystalline cellulose to hold largest share

TABLE 92 MICROCRYSTALLINE CELLULOSE MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 93 NORTH AMERICA: MICROCRYSTALLINE CELLULOSE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 94 EUROPE: MICROCRYSTALLINE CELLULOSE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 95 ASIA PACIFIC: MICROCRYSTALLINE CELLULOSE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 96 LATIN AMERICA: MICROCRYSTALLINE CELLULOSE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.7 Cellulose ethers

##### 6.2.2.7.1 Effectiveness in low concentrations to propel usage

TABLE 97 CELLULOSE ETHERS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 98 NORTH AMERICA: CELLULOSE ETHERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 99 EUROPE: CELLULOSE ETHERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 100 ASIA PACIFIC: CELLULOSE ETHERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 101 LATIN AMERICA: CELLULOSE ETHERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.8 CMC & croscarmellose sodium

6.2.2.8.1 Advantages to ensure wide usage as suspending agents in injectable preparations

TABLE 102 CMC & CROSCARMELLOSE SODIUM MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 103 NORTH AMERICA: CMC & CROSCARMELLOSE SODIUM MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 104 EUROPE: CMC & CROSCARMELLOSE SODIUM MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 105 ASIA PACIFIC: CMC & CROSCARMELLOSE SODIUM MARKET, BY

COUNTRY, 2021–2028 (USD MILLION)

TABLE 106 LATIN AMERICA: CMC & CROSCARMELLOSE SODIUM MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.9 Cellulose esters

6.2.2.9.1 Wide usage in pharma applications to support market growth

TABLE 107 CELLULOSE ESTERS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 108 NORTH AMERICA: CELLULOSE ESTERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 109 EUROPE: CELLULOSE ESTERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 110 ASIA PACIFIC: CELLULOSE ESTERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 111 LATIN AMERICA: CELLULOSE ESTERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.10 Starch

TABLE 112 STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 113 STARCH MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 114 NORTH AMERICA: STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 115 EUROPE: STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 116 ASIA PACIFIC: STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 117 LATIN AMERICA: STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.11 Modified starch

6.2.2.11.1 Wide use in sustained-release tablets attributed to cold-water swelling and gel barrier formation capabilities

TABLE 118 MODIFIED STARCH MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 119 NORTH AMERICA: MODIFIED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 120 EUROPE: MODIFIED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 121 ASIA PACIFIC: MODIFIED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 122 LATIN AMERICA: MODIFIED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.12 Dried starch

6.2.2.12.1 Strong binding and coating properties to favor demand growth

TABLE 123 DRIED STARCH MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 124 NORTH AMERICA: DRIED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 125 EUROPE: DRIED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 126 ASIA PACIFIC: DRIED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 127 LATIN AMERICA: DRIED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.2.13 Converted starch

##### 6.2.2.13.1 Support for enhancing drug solubility and stability to propel adoption

TABLE 128 CONVERTED STARCH MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 129 NORTH AMERICA: CONVERTED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 130 EUROPE: CONVERTED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 131 ASIA PACIFIC: CONVERTED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 132 LATIN AMERICA: CONVERTED STARCH MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.3 PETROCHEMICALS

TABLE 133 PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 134 PETROCHEMICALS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 135 NORTH AMERICA: PETROCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 136 EUROPE: PETROCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 137 ASIA PACIFIC: PETROCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 138 LATIN AMERICA: PETROCHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.3.1 Glycols

##### 6.2.3.1.1 Glycols to hold largest share of petrochemicals segment

TABLE 139 PHARMACEUTICAL EXCIPIENTS MARKET, BY GLYCOLS, 2021–2028 (USD MILLION)

TABLE 140 GLYCOLS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 141 NORTH AMERICA: GLYCOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 142 EUROPE: GLYCOLS MARKET, BY COUNTRY, 2021–2028 (USD



MILLION)

TABLE 143 ASIA PACIFIC: GLYCOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 144 LATIN AMERICA: GLYCOLS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.3.2 Povidones

6.2.3.2.1 Rising demand for fast-dissolving tablets to propel market growth

TABLE 145 POVIDONES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 146 NORTH AMERICA: POVIDONES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 147 EUROPE: POVIDONES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 148 ASIA PACIFIC: POVIDONES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 149 LATIN AMERICA: POVIDONES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.3.3 Mineral hydrocarbons

6.2.3.3.1 Growing preference for topical formulations in pain management to support demand for mineral hydrocarbons

TABLE 150 PHARMACEUTICAL EXCIPIENTS MARKET, BY MINERAL HYDROCARBONS, 2021–2028 (USD MILLION)

TABLE 151 MINERAL HYDROCARBONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 152 NORTH AMERICA: MINERAL HYDROCARBONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 153 EUROPE: MINERAL HYDROCARBONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 154 ASIA PACIFIC: MINERAL HYDROCARBONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 155 LATIN AMERICA: MINERAL HYDROCARBONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.3.4 Acrylic polymers

6.2.3.4.1 Wide use of acrylic polymers in controlled-release drug formulations to drive market

TABLE 156 ACRYLIC POLYMERS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 157 NORTH AMERICA: ACRYLIC POLYMERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 158 EUROPE: ACRYLIC POLYMERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 159 ASIA PACIFIC: ACRYLIC POLYMERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 160 LATIN AMERICA: ACRYLIC POLYMERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.3.5 Other petrochemical excipients

TABLE 161 OTHER PETROCHEMICAL EXCIPIENTS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 162 NORTH AMERICA: OTHER PETROCHEMICAL EXCIPIENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 163 EUROPE: OTHER PETROCHEMICAL EXCIPIENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 164 ASIA PACIFIC: OTHER PETROCHEMICAL EXCIPIENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 165 LATIN AMERICA: OTHER PETROCHEMICAL EXCIPIENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.4 PROTEINS

6.2.4.1 Growing applications of proteins as carriers for microparticles and nanoparticles to drive market

TABLE 166 PROTEINS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 167 NORTH AMERICA: PROTEINS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 168 EUROPE: PROTEINS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 169 ASIA PACIFIC: PROTEINS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 170 LATIN AMERICA: PROTEINS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.2.5 OTHER ORGANIC CHEMICALS

TABLE 171 OTHER ORGANIC CHEMICALS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 172 NORTH AMERICA: OTHER ORGANIC CHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 173 EUROPE: OTHER ORGANIC CHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 174 ASIA PACIFIC: OTHER ORGANIC CHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 175 LATIN AMERICA: OTHER ORGANIC CHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.3 INORGANIC CHEMICALS

TABLE 176 PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 177 PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY REGION, 2021–2028 (USD MILLION)

TABLE 178 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 179 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 180 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 181 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

### 6.3.1 CALCIUM PHOSPHATE

6.3.1.1 Chemical purity and low incompatibility with drugs to aid usage in pharma applications

TABLE 182 CALCIUM PHOSPHATE MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 183 NORTH AMERICA: CALCIUM PHOSPHATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 184 EUROPE: CALCIUM PHOSPHATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 185 ASIA PACIFIC: CALCIUM PHOSPHATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 186 LATIN AMERICA: CALCIUM PHOSPHATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 6.3.2 METAL OXIDES

6.3.2.1 Availability of silicon oxides in hydrophobic, hydrophilic, and granulated forms to aid market growth

TABLE 187 METAL OXIDES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 188 NORTH AMERICA: METAL OXIDES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 189 EUROPE: METAL OXIDES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 190 ASIA PACIFIC: METAL OXIDES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 191 LATIN AMERICA: METAL OXIDES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 6.3.3 HALITES

6.3.3.1 Increased utilization in vaccines and controlled-release formulations to drive

demand

TABLE 192 HALITES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 193 NORTH AMERICA: HALITES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 194 EUROPE: HALITES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 195 ASIA PACIFIC: HALITES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 196 LATIN AMERICA: HALITES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.3.4 CALCIUM CARBONATE

6.3.4.1 Short disintegration time and excellent mechanical strength for oral formulations to drive market

TABLE 197 CALCIUM CARBONATE MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 198 NORTH AMERICA: CALCIUM CARBONATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 199 EUROPE: CALCIUM CARBONATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 200 ASIA PACIFIC: CALCIUM CARBONATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 201 LATIN AMERICA: CALCIUM CARBONATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.3.5 CALCIUM SULFATE

6.3.5.1 Cost-effectiveness as diluent to support adoption

TABLE 202 CALCIUM SULFATE MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 203 NORTH AMERICA: CALCIUM SULFATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 204 EUROPE: CALCIUM SULFATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 205 ASIA PACIFIC: CALCIUM SULFATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 206 LATIN AMERICA: CALCIUM SULFATE MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.3.6 OTHER INORGANIC CHEMICALS

TABLE 207 OTHER INORGANIC CHEMICALS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 208 NORTH AMERICA: OTHER INORGANIC CHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 209 EUROPE: OTHER INORGANIC CHEMICALS MARKET, BY COUNTRY,

2021–2028 (USD MILLION)

TABLE 210 ASIA PACIFIC: OTHER INORGANIC CHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 211 LATIN AMERICA: OTHER INORGANIC CHEMICALS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 6.4 OTHER CHEMICALS

TABLE 212 PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER CHEMICALS, BY REGION, 2021–2028 (USD MILLION)

TABLE 213 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 214 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 215 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 216 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER CHEMICALS, BY COUNTRY, 2021–2028 (USD MILLION)

## 7 PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION

### 7.1 INTRODUCTION

TABLE 217 PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

### 7.2 ORAL FORMULATIONS

TABLE 218 PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 219 PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY REGION, 2021–2028 (USD MILLION)

TABLE 220 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 221 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 222 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 223 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

#### 7.2.1 TABLETS

7.2.1.1 Wide usage to drive market

TABLE 224 TYPICAL COMPOSITION OF TABLETS

TABLE 225 TABLETS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 226 NORTH AMERICA: TABLETS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 227 EUROPE: TABLETS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 228 ASIA PACIFIC: TABLETS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 229 LATIN AMERICA: TABLETS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

#### 7.2.2 CAPSULES

TABLE 230 CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 231 CAPSULES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 232 NORTH AMERICA: CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 233 EUROPE: CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 234 ASIA PACIFIC: CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 235 LATIN AMERICA: CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

##### 7.2.2.1 Hard-gelatin capsules

###### 7.2.2.1.1 Ease of manufacturing and versatility to drive market

TABLE 236 HARD-GELATIN CAPSULES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 237 NORTH AMERICA: HARD-GELATIN CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 238 EUROPE: HARD-GELATIN CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 239 ASIA PACIFIC: HARD-GELATIN CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 240 LATIN AMERICA: HARD-GELATIN CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

##### 7.2.2.2 Soft-gelatin capsules

###### 7.2.2.2.1 Stability concerns with highly water-soluble compounds to restrict growth

TABLE 241 SOFT-GELATIN CAPSULES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 242 NORTH AMERICA: SOFT-GELATIN CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 243 EUROPE: SOFT-GELATIN CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 244 ASIA PACIFIC: SOFT-GELATIN CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 245 LATIN AMERICA: SOFT-GELATIN CAPSULES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 7.2.3 LIQUID FORMULATIONS

#### 7.2.3.1 No dissolution time and rapid absorption to favor adoption

TABLE 246 LIQUID FORMULATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 247 NORTH AMERICA: LIQUID FORMULATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 248 EUROPE: LIQUID FORMULATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 249 ASIA PACIFIC: LIQUID FORMULATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 250 LATIN AMERICA: LIQUID FORMULATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 7.2.4 OTHER ORAL FORMULATIONS

TABLE 251 OTHER ORAL FORMULATIONS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 252 NORTH AMERICA: OTHER ORAL FORMULATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 253 EUROPE: OTHER ORAL FORMULATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 254 ASIA PACIFIC: OTHER ORAL FORMULATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 255 LATIN AMERICA: OTHER ORAL FORMULATIONS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 7.3 TOPICAL FORMULATIONS

#### 7.3.1 ADVANTAGES OF TOPICAL DRUG DELIVERY TO DRIVE MARKET

TABLE 256 PHARMACEUTICAL EXCIPIENTS MARKET FOR TOPICAL FORMULATIONS, BY REGION, 2021–2028 (USD MILLION)

TABLE 257 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR TOPICAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 258 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR TOPICAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 259 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR TOPICAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 260 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR TOPICAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

## 7.4 PARENTERAL FORMULATIONS

### 7.4.1 EMERGENCE OF NEW BIOLOGICAL MOLECULES TO INCREASE DEMAND FOR EXCIPIENTS

TABLE 261 TYPICAL COMPOSITION OF PARENTERAL FORMULATIONS

TABLE 262 EXCIPIENTS USED IN PARENTERAL FORMULATIONS

TABLE 263 PHARMACEUTICAL EXCIPIENTS MARKET FOR PARENTERAL FORMULATIONS, BY REGION, 2021–2028 (USD MILLION)

TABLE 264 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR PARENTERAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 265 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR PARENTERAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 266 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR PARENTERAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 267 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR PARENTERAL FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

## 7.5 OTHER FORMULATIONS

TABLE 268 PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FORMULATIONS, BY REGION, 2021–2028 (USD MILLION)

TABLE 269 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 270 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 271 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 272 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FORMULATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

## 8 PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY

### 8.1 INTRODUCTION

TABLE 273 PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

### 8.2 FILLERS & DILUENTS

#### 8.2.1 IMPROVED COHESION, DIRECT COMPRESSION, AND FLOW PROPERTIES TO SUPPORT ADOPTION

TABLE 274 FILLERS & DILUENTS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 275 NORTH AMERICA: FILLERS & DILUENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)



TABLE 276 EUROPE: FILLERS & DILUENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 277 ASIA PACIFIC: FILLERS & DILUENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 278 LATIN AMERICA: FILLERS & DILUENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 8.3 SUSPENDING & VISCOSITY AGENTS

8.3.1 DRUG STABILITY AND TASTE-MASKING ADVANTAGES TO SUPPORT DEMAND

TABLE 279 SUSPENDING & VISCOSITY AGENTS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 280 NORTH AMERICA: SUSPENDING & VISCOSITY AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 281 EUROPE: SUSPENDING & VISCOSITY AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 282 ASIA PACIFIC: SUSPENDING & VISCOSITY AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 283 LATIN AMERICA: SUSPENDING & VISCOSITY AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 8.4 COATING AGENTS

8.4.1 INCREASING USE OF SUSTAINED-RELEASE FORMULATIONS IN PHARMA INDUSTRY TO DRIVE MARKET

TABLE 284 COATING AGENTS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 285 NORTH AMERICA: COATING AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 286 EUROPE: COATING AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 287 ASIA PACIFIC: COATING AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 288 LATIN AMERICA: COATING AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

### 8.5 BINDERS

8.5.1 FLUIDITY AND COMPRESSIBILITY IN TABLET MANUFACTURING TO DRIVE DEMAND

TABLE 289 BINDERS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 290 NORTH AMERICA: BINDERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 291 EUROPE: BINDERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 292 ASIA PACIFIC: BINDERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 293 LATIN AMERICA: BINDERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

## 8.6 FLAVORING AGENTS & SWEETENERS

### 8.6.1 NEED TO IMPROVE DRUG PALATABILITY TO SUPPORT USAGE

TABLE 294 FLAVORING AGENTS & SWEETENERS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 295 NORTH AMERICA: FLAVORING AGENTS & SWEETENERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 296 EUROPE: FLAVORING AGENTS & SWEETENERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 297 ASIA PACIFIC: FLAVORING AGENTS & SWEETENERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 298 LATIN AMERICA: FLAVORING AGENTS & SWEETENERS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

## 8.7 DISINTEGRANTS

8.7.1 NEED TO ENSURE RAPID BREAK-UP OF SOLID DOSAGE FORMS TO DRIVE ADOPTION

TABLE 299 DISINTEGRANTS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 300 NORTH AMERICA: DISINTEGRANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 301 EUROPE: DISINTEGRANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 302 ASIA PACIFIC: DISINTEGRANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 303 LATIN AMERICA: DISINTEGRANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

## 8.8 COLORANTS

8.8.1 APPLICATIONS IN HARD AND SOFT GELATIN CAPSULES, TABLETS, ORAL LIQUIDS, AND TOPICAL CREAMS TO DRIVE MARKET

TABLE 304 COLORANTS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 305 NORTH AMERICA: COLORANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 306 EUROPE: COLORANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 307 ASIA PACIFIC: COLORANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 308 LATIN AMERICA: COLORANTS MARKET, BY COUNTRY, 2021–2028

(USD MILLION)

## 8.9 LUBRICANTS & GLIDANTS

8.9.1 NEED TO LESSEN WEAR AND TEAR ON FORMULATIONS TO SUPPORT LUBRICANT USAGE

TABLE 309 LUBRICANTS & GLIDANTS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 310 NORTH AMERICA: LUBRICANTS & GLIDANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 311 EUROPE: LUBRICANTS & GLIDANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 312 ASIA PACIFIC: LUBRICANTS & GLIDANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 313 LATIN AMERICA: LUBRICANTS & GLIDANTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

## 8.10 PRESERVATIVES

8.10.1 PRESERVATIVES TO SEE SUSTAINED USAGE TO ENSURE LONGER SHELF-LIFE

TABLE 314 PRESERVATIVES MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 315 NORTH AMERICA: PRESERVATIVES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 316 EUROPE: PRESERVATIVES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 317 ASIA PACIFIC: PRESERVATIVES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 318 LATIN AMERICA: PRESERVATIVES MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

## 8.11 EMULSIFYING AGENTS

8.11.1 HIGH USE OF SOLUBILITY ENHANCEMENT EXCIPIENTS IN LIQUID FORMULATIONS TO DRIVE MARKET

TABLE 319 EMULSIFYING AGENTS MARKET, BY REGION, 2021–2028 (USD MILLION)

TABLE 320 NORTH AMERICA: EMULSIFYING AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 321 EUROPE: EMULSIFYING AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 322 ASIA PACIFIC: EMULSIFYING AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 323 LATIN AMERICA: EMULSIFYING AGENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

## 8.12 OTHER FUNCTIONALITIES

TABLE 324 PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FUNCTIONALITIES, BY REGION, 2021–2028 (USD MILLION)

TABLE 325 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FUNCTIONALITIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 326 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FUNCTIONALITIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 327 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FUNCTIONALITIES, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 328 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FUNCTIONALITIES, BY COUNTRY, 2021–2028 (USD MILLION)

## 9 PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION

### 9.1 INTRODUCTION

TABLE 329 PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

### 9.2 STABILIZERS

9.2.1 IMPROVED DRUG SHELF LIFE AND REDUCED MANUFACTURING DEFECTS TO DRIVE MARKET

TABLE 330 PHARMACEUTICAL EXCIPIENTS MARKET FOR STABILIZERS, BY REGION, 2021–2028 (USD MILLION)

TABLE 331 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR STABILIZERS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 332 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR STABILIZERS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 333 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR STABILIZERS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 334 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR STABILIZERS, BY COUNTRY, 2021–2028 (USD MILLION)

### 9.3 TASTE MASKING

9.3.1 GREATER PATIENT COMPLIANCE AND ADHERENCE ADVANTAGES TO ENSURE ADOPTION

TABLE 335 PHARMACEUTICAL EXCIPIENTS MARKET FOR TASTE MASKING, BY REGION, 2021–2028 (USD MILLION)

TABLE 336 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR TASTE MASKING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 337 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR TASTE MASKING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 338 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR TASTE MASKING, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 339 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR TASTE MASKING, BY COUNTRY, 2021–2028 (USD MILLION)

#### 9.4 MODIFIED RELEASE

9.4.1 INCREASING USE OF MODIFIED-RELEASE FORMULATIONS TO DRIVE MARKET

TABLE 340 PHARMACEUTICAL EXCIPIENTS MARKET FOR MODIFIED RELEASE, BY REGION, 2021–2028 (USD MILLION)

TABLE 341 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR MODIFIED RELEASE, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 342 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR MODIFIED RELEASE, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 343 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR MODIFIED RELEASE, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 344 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR MODIFIED RELEASE, BY COUNTRY, 2021–2028 (USD MILLION)

#### 9.5 SOLUBILITY & BIOAVAILABILITY ENHANCEMENT

9.5.1 SOLUBILITY & BIOAVAILABILITY ENHANCEMENT EXCIPIENTS ESSENTIAL FOR EFFECTIVE DRUG DELIVERY

TABLE 345 PHARMACEUTICAL EXCIPIENTS MARKET FOR SOLUBILITY & BIOAVAILABILITY, BY REGION, 2021–2028 (USD MILLION)

TABLE 346 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR SOLUBILITY & BIOAVAILABILITY, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 347 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR SOLUBILITY & BIOAVAILABILITY, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 348 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR SOLUBILITY & BIOAVAILABILITY, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 349 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR SOLUBILITY & BIOAVAILABILITY, BY COUNTRY, 2021–2028 (USD MILLION)

#### 9.6 OTHER FUNCTIONALITY APPLICATIONS

TABLE 350 PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FUNCTIONALITY APPLICATIONS, BY REGION, 2021–2028 (USD MILLION)

TABLE 351 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FUNCTIONALITY APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 352 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER FUNCTIONALITY APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 353 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR OTHER

FUNCTIONALITY APPLICATIONS, BY COUNTRY, 2021–2028 (USD MILLION)  
TABLE 354 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR  
OTHER FUNCTIONALITY APPLICATIONS, BY COUNTRY, 2021–2028 (USD  
MILLION)

## **10 PHARMACEUTICAL EXCIPIENTS MARKET, BY REGION**

### 10.1 INTRODUCTION

TABLE 355 PHARMACEUTICAL EXCIPIENTS MARKET, BY REGION, 2021–2028  
(USD MILLION)

### 10.2 EUROPE

FIGURE 28 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET SNAPSHOT

#### 10.2.1 EUROPE: RECESSION IMPACT

TABLE 356 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET, BY COUNTRY,  
2021–2028 (USD MILLION)

TABLE 357 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT,  
2021–2028 (USD MILLION)

TABLE 358 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC  
CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 359 EUROPE: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD  
MILLION)

TABLE 360 EUROPE: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD  
MILLION)

TABLE 361 EUROPE: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 362 EUROPE: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD  
MILLION)

TABLE 363 EUROPE: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD  
MILLION)

TABLE 364 EUROPE: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 365 EUROPE: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 366 EUROPE: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD  
MILLION)

TABLE 367 EUROPE: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 368 EUROPE: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028  
(USD MILLION)

TABLE 369 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC  
CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 370 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET, BY  
FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 371 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 372 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 373 EUROPE: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 374 EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

#### 10.2.2 GERMANY

##### 10.2.2.1 Germany to hold largest market share in Europe

TABLE 375 GERMANY: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 376 GERMANY: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 377 GERMANY: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 378 GERMANY: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 379 GERMANY: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 380 GERMANY: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 381 GERMANY: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 382 GERMANY: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 383 GERMANY: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 384 GERMANY: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 385 GERMANY: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 386 GERMANY: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 387 GERMANY: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 388 GERMANY: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 389 GERMANY: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 390 GERMANY: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 391 GERMANY: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 392 GERMANY: PHARMACEUTICAL EXCIPIENTS MARKET, BY

**FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)****10.2.3 UK**

10.2.3.1 Growing adoption of generics and development of multi-functional, co-processed excipients to drive market

TABLE 393 UK: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 394 UK: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 395 UK: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 396 UK: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 397 UK: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 398 UK: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 399 UK: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 400 UK: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 401 UK: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 402 UK: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 403 UK: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 404 UK: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 405 UK: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 406 UK: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 407 UK: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 408 UK: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 409 UK: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 410 UK: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

**10.2.4 FRANCE**

10.2.4.1 Large geriatric population to support market growth

TABLE 411 FRANCE: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 412 FRANCE: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 413 FRANCE: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 414 FRANCE: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD



MILLION)

TABLE 415 FRANCE: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 416 FRANCE: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 417 FRANCE: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 418 FRANCE: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 419 FRANCE: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 420 FRANCE: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 421 FRANCE: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 422 FRANCE: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 423 FRANCE: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 424 FRANCE: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 425 FRANCE: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 426 FRANCE: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 427 FRANCE: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 428 FRANCE: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

#### 10.2.5 ITALY

10.2.5.1 Budgetary constraints and restricted healthcare spending to impede growth

TABLE 429 ITALY: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 430 ITALY: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 431 ITALY: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 432 ITALY: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 433 ITALY: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 434 ITALY: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 435 ITALY: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 436 ITALY: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 437 ITALY: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 438 ITALY: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 439 ITALY: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 440 ITALY: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 441 ITALY: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 442 ITALY: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 443 ITALY: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 444 ITALY: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 445 ITALY: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 446 ITALY: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

#### 10.2.6 SPAIN

##### 10.2.6.1 High consumption of biologics to support market growth

TABLE 447 SPAIN: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 448 SPAIN: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 449 SPAIN: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 450 SPAIN: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 451 SPAIN: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 452 SPAIN: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 453 SPAIN: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 454 SPAIN: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 455 SPAIN: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 456 SPAIN: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 457 SPAIN: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 458 SPAIN: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028

(USD MILLION)

TABLE 459 SPAIN: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 460 SPAIN: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 461 SPAIN: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 462 SPAIN: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 463 SPAIN: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 464 SPAIN: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

#### 10.2.7 REST OF EUROPE

TABLE 465 REST OF EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 466 REST OF EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 467 REST OF EUROPE: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 468 REST OF EUROPE: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 469 REST OF EUROPE: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 470 REST OF EUROPE: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 471 REST OF EUROPE: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 472 REST OF EUROPE: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 473 REST OF EUROPE: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 474 REST OF EUROPE: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 475 REST OF EUROPE: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 476 REST OF EUROPE: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 477 REST OF EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 478 REST OF EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 479 REST OF EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 480 REST OF EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 481 REST OF EUROPE: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 482 REST OF EUROPE: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

### 10.3 NORTH AMERICA

#### 10.3.1 NORTH AMERICA: RECESSION IMPACT

FIGURE 29 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET SNAPSHOT

TABLE 483 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 484 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 485 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 486 NORTH AMERICA: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 487 NORTH AMERICA: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 488 NORTH AMERICA: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 489 NORTH AMERICA: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 490 NORTH AMERICA: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 491 NORTH AMERICA: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 492 NORTH AMERICA: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 493 NORTH AMERICA: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 494 NORTH AMERICA: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 495 NORTH AMERICA: MINERAL HYDROCARBONS MARKET, BY TYPE,

2021–2028 (USD MILLION)

TABLE 496 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 497 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 498 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 499 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 500 NORTH AMERICA: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 501 NORTH AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

### 10.3.2 US

#### 10.3.2.1 US to dominate North American market

TABLE 502 US: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 503 US: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 504 US: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 505 US: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 506 US: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 507 US: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 508 US: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 509 US: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 510 US: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 511 US: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 512 US: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 513 US: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 514 US: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 515 US: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 516 US: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 517 US: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 518 US: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 519 US: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

### 10.3.3 CANADA

10.3.3.1 Strong growth of emerging markets and slowdown in new product approvals to hamper growth

TABLE 520 CANADA: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 521 CANADA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 522 CANADA: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 523 CANADA: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 524 CANADA: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 525 CANADA: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 526 CANADA: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 527 CANADA: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 528 CANADA: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 529 CANADA: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 530 CANADA: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 531 CANADA: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 532 CANADA: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 533 CANADA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 534 CANADA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 535 CANADA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 536 CANADA: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 537 CANADA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

### 10.4 ASIA PACIFIC

#### 10.4.1 ASIA PACIFIC: RECESSION IMPACT

TABLE 538 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET, BY

COUNTRY, 2021–2028 (USD MILLION)

TABLE 539 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 540 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 541 ASIA PACIFIC: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 542 ASIA PACIFIC: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 543 ASIA PACIFIC: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 544 ASIA PACIFIC: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 545 ASIA PACIFIC: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 546 ASIA PACIFIC: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 547 ASIA PACIFIC: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 548 ASIA PACIFIC: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 549 ASIA PACIFIC: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 550 ASIA PACIFIC: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 551 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 552 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 553 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 554 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 555 ASIA PACIFIC: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 556 ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

#### 10.4.2 CHINA

##### 10.4.2.1 Emphasis on generics and off-patent drugs to drive market

TABLE 557 CHINA: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 558 CHINA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 559 CHINA: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 560 CHINA: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 561 CHINA: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 562 CHINA: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 563 CHINA: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 564 CHINA: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 565 CHINA: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 566 CHINA: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 567 CHINA: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 568 CHINA: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 569 CHINA: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 570 CHINA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 571 CHINA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 572 CHINA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 573 CHINA: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 574 CHINA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

#### 10.4.3 JAPAN

10.4.3.1 Rapid growth in geriatric population to drive demand for pharmaceuticals

TABLE 575 JAPAN: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 576 JAPAN: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 577 JAPAN: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 578 JAPAN: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)



TABLE 579 JAPAN: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 580 JAPAN: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 581 JAPAN: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 582 JAPAN: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 583 JAPAN: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 584 JAPAN: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 585 JAPAN: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 586 JAPAN: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 587 JAPAN: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 588 JAPAN: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 589 JAPAN: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 590 JAPAN: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 591 JAPAN: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 592 JAPAN: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

#### 10.4.4 INDIA

##### 10.4.4.1 High generics production to support market growth

TABLE 593 INDIA: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 594 INDIA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 595 INDIA: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 596 INDIA: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 597 INDIA: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 598 INDIA: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 599 INDIA: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 600 INDIA: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 601 INDIA: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 602 INDIA: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 603 INDIA: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 604 INDIA: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 605 INDIA: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 606 INDIA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 607 INDIA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 608 INDIA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 609 INDIA: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 610 INDIA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

#### 10.4.5 SOUTH KOREA

##### 10.4.5.1 Strong and growing pharma industry to ensure market growth

TABLE 611 SOUTH KOREA: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 612 SOUTH KOREA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 613 SOUTH KOREA: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 614 SOUTH KOREA: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 615 SOUTH KOREA: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 616 SOUTH KOREA: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 617 SOUTH KOREA: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 618 SOUTH KOREA: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 619 SOUTH KOREA: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 620 SOUTH KOREA: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 621 SOUTH KOREA: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 622 SOUTH KOREA: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 623 SOUTH KOREA: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 624 SOUTH KOREA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 625 SOUTH KOREA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 626 SOUTH KOREA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 627 SOUTH KOREA: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 628 SOUTH KOREA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

#### 10.4.6 REST OF ASIA PACIFIC

TABLE 629 REST OF ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 630 REST OF ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 631 REST OF ASIA PACIFIC: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 632 REST OF ASIA PACIFIC: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 633 REST OF ASIA PACIFIC: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 634 REST OF ASIA PACIFIC: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 635 REST OF ASIA PACIFIC: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 636 REST OF ASIA PACIFIC: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 637 REST OF ASIA PACIFIC: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 638 REST OF ASIA PACIFIC: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 639 REST OF ASIA PACIFIC: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 640 REST OF ASIA PACIFIC: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 641 REST OF ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 642 REST OF ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 643 REST OF ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 644 REST OF ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 645 REST OF ASIA PACIFIC: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 646 REST OF ASIA PACIFIC: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

## 10.5 LATIN AMERICA

10.5.1 GROWING GERIATRIC POPULATION AND DISEASE PREVALENCE TO DRIVE MARKET

### 10.5.2 LATIN AMERICA: RECESSION IMPACT

TABLE 647 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY COUNTRY, 2021–2028 (USD MILLION)

TABLE 648 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 649 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 650 LATIN AMERICA: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 651 LATIN AMERICA: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 652 LATIN AMERICA: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 653 LATIN AMERICA: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 654 LATIN AMERICA: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 655 LATIN AMERICA: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 656 LATIN AMERICA: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 657 LATIN AMERICA: PETROCHEMICALS MARKET, BY TYPE, 2021–2028

(USD MILLION)

TABLE 658 LATIN AMERICA: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 659 LATIN AMERICA: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 660 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 661 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 662 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 663 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 664 LATIN AMERICA: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 665 LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

### 10.5.3 BRAZIL

#### 10.5.3.1 Brazil to hold largest share in LATAM market

TABLE 666 BRAZIL: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 667 BRAZIL: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 668 BRAZIL: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 669 BRAZIL: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 670 BRAZIL: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 671 BRAZIL: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 672 BRAZIL: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 673 BRAZIL: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 674 BRAZIL: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 675 BRAZIL: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 676 BRAZIL: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 677 BRAZIL: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 678 BRAZIL: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 679 BRAZIL: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 680 BRAZIL: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 681 BRAZIL: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 682 BRAZIL: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 683 BRAZIL: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

#### 10.5.4 REST OF LATIN AMERICA

TABLE 684 REST OF LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 685 REST OF LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 686 REST OF LATIN AMERICA: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 687 REST OF LATIN AMERICA: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 688 REST OF LATIN AMERICA: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 689 REST OF LATIN AMERICA: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 690 REST OF LATIN AMERICA: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 691 REST OF LATIN AMERICA: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 692 REST OF LATIN AMERICA: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 693 REST OF LATIN AMERICA: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 694 REST OF LATIN AMERICA: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 695 REST OF LATIN AMERICA: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 696 REST OF LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 697 REST OF LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET,

BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 698 REST OF LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 699 REST OF LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 700 REST OF LATIN AMERICA: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 701 REST OF LATIN AMERICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

## 10.6 MIDDLE EAST & AFRICA

### 10.6.1 MIDDLE EAST & AFRICA: RECESSION IMPACT

### 10.6.2 MIDDLE EAST

10.6.2.1 Growing attention from global players to favor growth of middle eastern markets

TABLE 702 MIDDLE EAST: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 703 MIDDLE EAST: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 704 MIDDLE EAST: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 705 MIDDLE EAST: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 706 MIDDLE EAST: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 707 MIDDLE EAST: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 708 MIDDLE EAST: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 709 MIDDLE EAST: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 710 MIDDLE EAST: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 711 MIDDLE EAST: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 712 MIDDLE EAST: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 713 MIDDLE EAST: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 714 MIDDLE EAST: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 715 MIDDLE EAST: PHARMACEUTICAL EXCIPIENTS MARKET, BY

FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 716 MIDDLE EAST: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 717 MIDDLE EAST: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 718 MIDDLE EAST: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 719 MIDDLE EAST: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

### 10.6.3 AFRICA

10.6.3.1 Rising urbanization, growing healthcare access to offer growth opportunities

TABLE 720 AFRICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY PRODUCT, 2021–2028 (USD MILLION)

TABLE 721 AFRICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 722 AFRICA: OLEOCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 723 AFRICA: CARBOHYDRATES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 724 AFRICA: SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 725 AFRICA: ACTUAL SUGARS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 726 AFRICA: SUGAR ALCOHOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 727 AFRICA: CELLULOSE MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 728 AFRICA: STARCH MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 729 AFRICA: PETROCHEMICALS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 730 AFRICA: GLYCOLS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 731 AFRICA: MINERAL HYDROCARBONS MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 732 AFRICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR INORGANIC CHEMICALS, BY TYPE, 2021–2028 (USD MILLION)

TABLE 733 AFRICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FUNCTIONALITY, 2021–2028 (USD MILLION)

TABLE 734 AFRICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY FORMULATION, 2021–2028 (USD MILLION)

TABLE 735 AFRICA: PHARMACEUTICAL EXCIPIENTS MARKET FOR ORAL FORMULATIONS, BY TYPE, 2021–2028 (USD MILLION)



TABLE 736 AFRICA: CAPSULES MARKET, BY TYPE, 2021–2028 (USD MILLION)

TABLE 737 AFRICA: PHARMACEUTICAL EXCIPIENTS MARKET, BY  
FUNCTIONALITY APPLICATION, 2021–2028 (USD MILLION)

## 11 COMPETITIVE LANDSCAPE

11.1 INTRODUCTION

11.2 KEY PLAYER STRATEGIES/RIGHT-TO-WIN

FIGURE 30 OVERVIEW OF STRATEGIES DEPLOYED BY KEY PLAYERS

11.3 REVENUE SHARE ANALYSIS

FIGURE 31 REVENUE ANALYSIS OF KEY PLAYERS (2020–2022)

11.4 MARKET SHARE ANALYSIS

FIGURE 32 PHARMACEUTICAL EXCIPIENTS MARKET: MARKET SHARE ANALYSIS  
(2022)

TABLE 738 PHARMACEUTICAL EXCIPIENTS MARKET: DEGREE OF COMPETITION

11.5 COMPANY EVALUATION MATRIX

11.5.1 STARS

11.5.2 EMERGING LEADERS

11.5.3 PERVASIVE PLAYERS

11.5.4 PARTICIPANTS

FIGURE 33 PHARMACEUTICAL EXCIPIENTS MARKET: COMPANY EVALUATION  
MATRIX, 2022

11.5.5 COMPANY FOOTPRINT

TABLE 739 PRODUCT FOOTPRINT (25 COMPANIES)

TABLE 740 REGIONAL FOOTPRINT (25 COMPANIES)

11.6 START-UP/SME EVALUATION MATRIX

11.6.1 PROGRESSIVE COMPANIES

11.6.2 STARTING BLOCKS

11.6.3 RESPONSIVE COMPANIES

11.6.4 DYNAMIC COMPANIES

FIGURE 34 PHARMACEUTICAL EXCIPIENTS MARKET: START-UP/SME MATRIX,  
2022

11.6.5 COMPETITIVE BENCHMARKING

TABLE 741 PHARMACEUTICAL EXCIPIENTS MARKET: DETAILED LIST OF KEY  
START-UP/SME PLAYERS

TABLE 742 PHARMACEUTICAL EXCIPIENTS MARKET: COMPETITIVE  
BENCHMARKING OF START-UP/SME PLAYERS

11.7 COMPETITIVE SCENARIO AND TRENDS

11.7.1 PRODUCT LAUNCHES

TABLE 743 PHARMACEUTICAL EXCIPIENTS MARKET: PRODUCT LAUNCHES,  
JANUARY 2020 TO DECEMBER 2023

#### 11.7.2 DEALS

TABLE 744 PHARMACEUTICAL EXCIPIENTS MARKET: DEALS, JANUARY 2020 TO  
DECEMBER 2023

#### 11.7.3 OTHER DEVELOPMENTS

TABLE 745 PHARMACEUTICAL EXCIPIENTS MARKET: OTHER DEVELOPMENTS,  
JANUARY 2020 TO DECEMBER 2023

## 12 COMPANY PROFILES

(Business overview, Products/Solutions/Services offered, Recent developments & MnM  
View)

### 12.1 KEY PLAYERS

#### 12.1.1 INTERNATIONAL FLAVORS & FRAGRANCES INC.

TABLE 746 INTERNATIONAL FLAVORS & FRAGRANCES INC.: BUSINESS  
OVERVIEW

FIGURE 35 INTERNATIONAL FLAVORS & FRAGRANCES INC.: COMPANY  
SNAPSHOT (2022)

#### 12.1.2 BASF SE

TABLE 747 BASF SE: BUSINESS OVERVIEW

FIGURE 36 BASF SE: COMPANY SNAPSHOT (2022)

#### 12.1.3 ASHLAND INC.

TABLE 748 ASHLAND INC.: BUSINESS OVERVIEW

FIGURE 37 ASHLAND INC.: COMPANY SNAPSHOT (2022)

#### 12.1.4 EVONIK INDUSTRIES AG

TABLE 749 EVONIK INDUSTRIES AG: BUSINESS OVERVIEW

FIGURE 38 EVONIK INDUSTRIES AG: COMPANY SNAPSHOT (2022)

#### 12.1.5 KERRY GROUP PLC

TABLE 750 KERRY GROUP PLC: BUSINESS OVERVIEW

FIGURE 39 KERRY GROUP PLC: COMPANY SNAPSHOT (2022)

#### 12.1.6 ROQUETTE FRERES

TABLE 751 ROQUETTE FRERES: BUSINESS OVERVIEW

#### 12.1.7 MERCK KGAA

TABLE 752 MERCK KGAA: BUSINESS OVERVIEW

FIGURE 40 MERCK KGAA: COMPANY SNAPSHOT (2022)

#### 12.1.8 ASSOCIATED BRITISH FOODS PLC

TABLE 753 ASSOCIATED BRITISH FOODS PLC: BUSINESS OVERVIEW

FIGURE 41 ASSOCIATED BRITISH FOODS PLC: COMPANY SNAPSHOT (2022)

#### 12.1.9 ADM

TABLE 754 ADM: BUSINESS OVERVIEW

FIGURE 42 ADM: COMPANY SNAPSHOT (2022)

#### 12.1.10 WACKER CHEMIE AG

TABLE 755 WACKER CHEMIE AG: BUSINESS OVERVIEW

FIGURE 43 WACKER CHEMIE AG: COMPANY SNAPSHOT (2022)

#### 12.1.11 AIR LIQUIDE

TABLE 756 AIR LIQUIDE: BUSINESS OVERVIEW

FIGURE 44 AIR LIQUIDE: COMPANY SNAPSHOT (2022)

#### 12.1.12 DOW

TABLE 757 DOW: BUSINESS OVERVIEW

FIGURE 45 DOW: COMPANY SNAPSHOT (2022)

#### 12.1.13 LUBRIZOL CORPORATION (BERKSHIRE HATHAWAY)

TABLE 758 LUBRIZOL CORPORATION: BUSINESS OVERVIEW

#### 12.1.14 COLORCON

TABLE 759 COLORCON: BUSINESS OVERVIEW

#### 12.1.15 DFE PHARMA

TABLE 760 DFE PHARMA: BUSINESS OVERVIEW

\*Details on Business overview, Products/Solutions/Services offered, Recent developments & MnM View might not be captured in case of unlisted companies.

### 12.2 OTHER PLAYERS

#### 12.2.1 INNOPHOS

#### 12.2.2 J. RETTENMAIER & SOHNE GMBH + CO KG

#### 12.2.3 ACTYLIS

#### 12.2.4 MEGGLE GMBH & CO. KG

#### 12.2.5 FUJI CHEMICAL INDUSTRIES CO., LTD.

#### 12.2.6 COREL PHARMA CHEM

#### 12.2.7 BIOGRUND GMBH

#### 12.2.8 NITIKA PHARMACEUTICAL SPECIALTIES PVT. LTD.

#### 12.2.9 R.T. VANDERBILT HOLDING COMPANY, INC.

#### 12.2.10 BENEIO

## 13 APPENDIX

### 13.1 DISCUSSION GUIDE

### 13.2 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

### 13.3 CUSTOMIZATION OPTIONS

### 13.4 RELATED REPORTS

### 13.5 AUTHOR DETAILS

## About

The global pharmaceutical excipients market is estimated to be valued at \$XX million in 2013 and is expected to reach \$XX million by 2018, growing at a CAGR of XX% from 2013 to 2018. The market is highly fragmented with numerous players and is commoditized to an extent. In 2012, none of the market players had market shares worth more than XX%. Some of the leading players in the industry include BASF (Germany), Ashland, Inc. (U.S.), Dow Chemical Company (U.S.), FMC (U.S.), Roquette (France), JRS Pharma (Germany), and Associated British Foods (U.K.). Together, the top 10 players accounted for approximately XX% to XX% of the global pharmaceutical excipients market in 2012. The smaller players—based in emerging markets such as China, India, or Brazil—together hold a significant share of the market.

Currently, the global pharmaceutical excipients industry is driven by the rising demand for functional excipients from the pharmaceutical industry. This increase in demand can be attributed to the need to address the solubility issues of the recently developed APIs. Development of multifunctional excipients and co-processed excipients is also expected to play a vital role in market growth during the forecast period. In addition, the sudden increase in the generics market due to patent expiration of many blockbuster drugs is also expected to drive the sales volume of the excipients market during the forecast period.

As pharmaceutical excipients form a miniscule fraction of the overall pharmaceutical industry and individual excipient ingredients market as well, most pharmaceutical excipients manufacturers did not adhere to the stringent quality and regulatory requirements for their pharmaceutical applications. However, more recent quality issues with excipients have led to strict regulatory guidelines for use of excipients in the pharmaceutical industry. Today, quality and safety regulations extend to deeper levels of the industry starting from designing of excipients to manufacturing, supply chain, and storage. This has impacted the smaller businesses in the industry, wherein non-compliance has resulted in severe economic losses for these players.

Currently, the global healthcare scenario is under transition with rising concerns for healthcare cost control. Thus, many of the pharmaceutical companies are under pressure to maintain their existing profit margins and improve them in future. This has led to a dramatic shift in the business model of some of the leading pharmaceutical manufacturers in the industry. As a direct impact of this, excipient manufacturers are under enormous pressure to cut prices. Furthermore, the increasing cost of raw

materials, stringent regulatory requirements and quality specifications, and the increasingly competitive environment are all factors that are leading to the rapid erosion of profit margins for many of the excipient manufacturers. Declining R&D investments from excipient manufacturers also represent a significant challenge for the market growth during the forecast period of 2013 to 2018.

The global pharmaceutical excipients market studied in this report is segmented in two ways, namely, by functionality and by products.

The overall pharmaceutical excipients market can be segmented under the categories, by product and by functionality markets. The by product type market is further divided into three categories, namely organic chemicals, inorganic chemicals, and others. The by functionality market is divided into ten categories, namely fillers & diluents, binders, suspension & viscosity agents, coatings, flavoring agents, disintegrants, colorants, lubricants & glidants, preservatives, and other applications.

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