

Global Sterile Injectable Drugs Market: By Molecule Type (Large Molecules, Small Molecules), Drug Type (Monoclonal Antibodies, Cytokines, Insulin, Peptide Hormones, Blood Factors, Vaccines, Immunoglobulins, Peptide Antibiotics, and Others), Disease Indication (Cancer, Diabetes, Cardiovascular Diseases, Musculoskeletal, CNS, Infections, and Others), Route of Administration (Intravenous (IV), Intramuscular (IM), Subcutaneous (SC), and Others), Distribution Channel (Hospital Pharmacies, Retail Pharmacies, and Online Pharmacies) and Geography - Market Estimation, Dynamics, Regional Share, Trends, Competitor Analysis 2012-2016 and Forecast 2017-2023

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Abstracts

Global Sterile Injectables Market Report Description:

Sterile Injectables market report gives comprehensive outlook on sterile injectable across the globe with special emphasis on key regions such as North America, Europe, Asia-Pacific, Latin America, and Middle East & Africa (MEA). This report on sterile injectable market gives historical, current, and future market sizes (US\$ Mn) of drug molecules, drug types, disease application, route of administration, end users, and geographic regions. This report studies sterile injectable market dynamics elaborately to

identify the current trends & drivers, future opportunities and possible challenges to the key stakeholders operating in the market. In addition, sterile injectable market report includes drug pipeline analysis, regulatory scenario, and competition analysis with vividly illustrated the competition dashboard to assess the market competition. Moreover, PBI analyzed sterile injectable market to better equip clients with possible investment opportunities across the regions (Regional Investment Hot-Spots) and market unmet needs (Product Opportunities). Key stakeholders of the sterile injectable market report include suppliers, manufacturers, marketers, policy makers engaged in manufacturing and supply of sterile injectable .

Sterile Injectables Market:

The sterile injectable market estimated to be valued US\$ 361 Bn in 2016 and poised to grow at CAGR 7.3%. Market for sterile injectable projected to reach US\$ 552 Bn by 2023.

Do the burgeoning product pipelines and drug patent expiries have positive impact on the market?

The rising shift of pharmaceutical and biotechnology firms towards the development of medications for chronic diseases such as cancer, diabetes, and cardio vascular and among others have created ample growth opportunities for players in the market. Moreover, biologic have become larger part of product pipelines of several drug developers, which could affect market growth positively over the forecast period. For instance, there are around 2,500 injectable products are in developmental stage. Moreover, rising product patent expiries of several blockbuster in recent times expected to propel market growth over the forecast period. For instance in 2015, Teva Pharmaceutical Industries Ltd. lost patent for its top selling multiple sclerosis drug Copaxone.

How operational and installation cost effects the sterile injectable market?

Several industry experts noted that the cost of establishing sterile injectable plants is significantly higher viz-a-viz non sterile manufacturing plants owing to stringent aseptic requirements and complex manufacturing process; this has led to the consolidation of the industry by backward and forward integration. Moreover, competition from low cost manufacturers, value chain integration coupled with high entry barrier for new players in sterile injectable market expect impact market growth negatively over the forecast period.

North America accounts for larger market revenue share in global sterile injectable market

North America leads the global sterile injectable market in terms of revenue in 2016. Regions such as Asia Pacific and Europe presented better growth opportunities for the market players owing to conducive business policies and increased local production generic injectable . For instance, in 2013, Mylan Inc. completed the acquisition of the Agila injectables businesses from Strides Arcolab Limited.

COMPETITION ASSESSMENT

Key players profiles in the global sterile injectable market include:

AbbVie Inc. (U.S)

Amgen Inc. (U.S)

AstraZeneca plc (U.K)

Baxter International Inc. (U.S)

Eli Lilly and Company (U.S)

GILEAD SCIENCES, INC. (U.S)

GlaxoSmithKline plc. (U.K)

Johnson & Johnson Services, Inc. (U.S)

Merck & Co., Inc. (U.S)

Novo Nordisk A/S (Denmark)

Novartis AG (Switzerland)

Pfizer Inc. (U.S)

F. Hoffmann-La Roche AG (Switzerland)

Sanofi (France)

Market players are focusing on mergers and acquisitions to improve their market position in sterile injectable market. For instance, in 2016, Baxter International Inc. acquired Claris Injectables Limited, a wholly owned subsidiary of Claris Lifesciences Limited, for total consideration of approximately \$625mn. In 2015 Pfizer Inc. acquired Hospira, Inc., world's leading provider of injectable and infusion technologies.

KEY FINDINGS OF THE REPORT:

Sterile injectable market expanding at 7.3% CAGR over 2017 to 2023 to reach market value of US\$ 552 Bn by 2023

Based on molecule type large molecules accounted for larger market share in 2016

Oncology segment expected to be most lucrative market in global sterile injectable market

Hospital pharmacies are prime channel for sterile drug distribution across the globe

Players focusing on expanding geographic presence to garner market opportunities in developing economies

KEY FEATURES OF THE REPORT:

The report provides granular level information about the market size, regional market share, historic market (2012-2016) and forecast (2017-2023)

The report covers in-detail insights about the competitor's overview, company share analysis, key market developments, and their key strategies

The report outlines drivers, restraints, unmet needs, and trends that are currently affecting the market

The report tracks recent innovations, key developments and startup's details that are actively working in the market

The report provides plethora of information about market entry strategies, regulatory framework and reimbursement scenario

The report analyses the impact of socio-political environment through PESTLE Analysis and competition through Porter's Five Force Analysis in addition to recent technology advancements and innovations in the market

DETAILED SEGMENTATION

By Molecule Type

Large Molecules

Small Molecules

Drug Type

Monoclonal Antibodies

Cytokines

Insulin

Peptide Hormones

Blood Factors

Vaccines

Immunoglobulins

Peptide Antibiotics

Others

Disease Indication

Cancer

Diabetes

Cardiovascular Diseases

Musculoskeletal

CNS

Infections

Others

Route of Administration

Intravenous (IV)

Intramuscular (IM)

Subcutaneous (SC)

Others

Distribution Channel

Hospital Pharmacies

Retail Pharmacies

Online Pharmacies

Geography

North America

U.S

Canada

Europe

Germany

France

U.K

Italy

Spain

Russia

Poland

Rest of Europe

Asia-Pacific

Japan

China

India

Australia & New Zealand

ASEAN (Includes Indonesia, Thailand, Vietnam, Philippines, Malaysia, and Others)

South Korea

Rest of Asia-Pacific

Latin America

Brazil

Mexico

Argentina

Venezuela

Rest of Latin America

Middle East and Africa (MEA)

Gulf Cooperation Council (GCC) Countries

Israel

South Africa

Rest of MEA

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