

Oral Thin Film and Transdermal Drug Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application

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Abstracts

Oral Thin Film and Transdermal Drug Market Summary

Introduction

The Oral Thin Film and Transdermal Drug market encompasses innovative drug delivery systems designed for rapid, non-invasive administration, enhancing patient compliance and efficacy. Oral thin films, introduced with Japan's voglibose in 2006, followed by ondansetron in the U.S. and Europe in 2010, and olanzapine in China in 2020, dissolve quickly in the mouth, ideal for pharmaceuticals and animal health. Transdermal drugs, pioneered by ALZA in 1969, peaked in the 1990s but stabilized post-2005 due to patent expirations, with rivastigmine as a rare blockbuster. Production methods like coating for films and diverse forms like patches and ointments define the sector. The global transdermal patch market stood at USD 5.32 billion and cataplasms at USD 3.22 billion in 2021, both shrinking, with the U.S. and Japan leading, while China grows rapidly. This market thrives on convenience, aging populations, and chronic disease management, though it faces stagnation from generics and regulatory hurdles.

Market Size and Growth Forecast

The global Oral Thin Film and Transdermal Drug market is projected to reach USD 12 billion to USD 14 billion in 2025, with a CAGR of 1% to 3% through 2030, expanding to USD 13 billion to USD 15 billion, reflecting modest growth amid saturation.

Regional Analysis

North America: Expected at 1% to 2%, the U.S. leads with USD 2.19 billion in patches (2021). Trends focus on pain management and generics.

Europe: Forecasted at 0% to 2%, Germany and the UK prioritize pharmaceuticals. Trends emphasize bioavailability enhancements.

Asia Pacific: Projected at 2% to 4%, Japan (USD 4.13 billion in patches) and China (USD 320 million) grow. Trends favor rapid adoption.

South America: Anticipated at 1% to 3%, Brazil emerges in animal health. Trends lean toward cost-effective films.

Middle East and Africa: Expected at 1% to 3%, the UAE grows in pharma. Trends focus on accessibility.

Application Analysis

Pharmaceutical: Projected at 1% to 3%, it dominates with chronic disease treatments. Trends shift to personalized delivery.

Animal Health: Expected at 0% to 2%, it serves veterinary needs. Trends favor ease of administration.

Key Market Players

Oramed Pharmaceuticals: A leader, Oramed innovates in oral delivery.

IntelGenx Technologies Corp.: A film specialist, IntelGenx enhances bioavailability.

BioDelivery Sciences International Inc.: A pharma firm, BioDelivery targets pain relief.

Lexaria Bioscience Corp.: An innovator, Lexaria advances absorption tech.

Taro Pharmaceuticals Industries Ltd.: A generics player, Taro focuses on affordability.

Catalent Inc.: A solutions provider, Catalent excels in film production.

Insulet Corporation: A device leader, Insulet explores transdermal tech.

Nutriband Inc.: A patch innovator, Nutriband improves adhesion.

Virpax Pharmaceuticals Inc.: A pharma firm, Virpax targets novel delivery.

Hempfusion Wellness Inc.: A wellness player, Hempfusion serves niche markets.

Gelteq Limited: An emerging firm, Gelteq advances film tech.

Johnson & Johnson: A global giant, J&J leads in transdermal solutions.

Hisamitsu Pharmaceutical: A Japanese leader, Hisamitsu excels in patches.

Teikoku Seiyaku: A patch specialist, Teikoku serves pharma needs.

Novartis: A pharma titan, Novartis focuses on efficacy.

AbbVie: A leader, AbbVie targets chronic conditions.

Amarin: A niche player, Amarin explores transdermal options.

Bausch & Lomb: An eye care firm, Bausch expands into films.

Elan: A pioneer, Elan shaped transdermal history.

Noven: A patch expert, Noven enhances delivery.

MSD: A global player, MSD advances drug systems.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate, with R&D and regulatory barriers, though generics lower entry costs.

Threat of Substitutes: High, as oral pills and injections compete, but convenience sustains demand.

Bargaining Power of Buyers: High, with healthcare systems demanding cost-effective options.

Bargaining Power of Suppliers: Moderate, as raw materials are specialized, balanced by scale.

Competitive Rivalry: Intense, driven by generics and innovation in a mature market.

Impact of Tariff Conflicts on Supply Chain Localization

Tariff conflicts have spurred localization in the Oral Thin Film and Transdermal Drug market, reducing reliance on imported raw materials like polymers and APIs. U.S.-China trade tensions push North American firms to bolster domestic production, aligning with pharma demand, while Europe sources locally to meet regulatory standards. In Asia Pacific, Japan and China enhance regional manufacturing, cutting costs and ensuring supply stability. This shift demands investment in facilities and compliance, but it enhances resilience against trade disruptions, supporting steady delivery in a shrinking market.

Market Opportunities and Challenges

Opportunities

Aging Population: Elderly needs drive demand for easy administration.

Chronic Diseases: Pain and mental health treatments boost use.

Emerging Markets: China's rapid growth offers expansion.

Innovation: Enhanced bioavailability attracts investment.

Animal Health: Veterinary applications grow steadily.

Challenges

Market Stagnation: Patent expiries limit growth.

Regulatory Hurdles: Approvals delay launches.

Generics Pressure: Low-cost alternatives erode profits.

Safety Concerns: Adhesion and dosage risks challenge trust.

Competition: Traditional delivery methods vie for share.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

3.1 Research Scope

3.2 Research Sources

3.2.1 Data Sources

3.2.2 Assumptions

3.3 Research Method

Chapter Four Market Landscape

4.1 Market Overview

4.2 Classification/Types

4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

5.1 Introduction

5.2 Drivers

5.3 Restraints

5.4 Opportunities

5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

6.1 Upstream/Suppliers Analysis

6.2 Oral Thin Film and Transdermal Drug Analysis

6.2.1 Technology Analysis

6.2.2 Cost Analysis

6.2.3 Market Channel Analysis

6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

7.1 Latest News

7.2 Merger and Acquisition

7.3 Planned/Future Project

7.4 Policy Dynamics

CHAPTER 8 HISTORICAL AND FORECAST ORAL THIN FILM AND TRANSDERMAL DRUG MARKET IN NORTH AMERICA (2020-2030)

8.1 Oral Thin Film and Transdermal Drug Market Size

8.2 Oral Thin Film and Transdermal Drug Market by End Use

8.3 Competition by Players/Suppliers

8.4 Oral Thin Film and Transdermal Drug Market Size by Type

8.5 Key Countries Analysis

8.5.1 United States

8.5.2 Canada

8.5.3 Mexico

CHAPTER 9 HISTORICAL AND FORECAST ORAL THIN FILM AND TRANSDERMAL DRUG MARKET IN SOUTH AMERICA (2020-2030)

9.1 Oral Thin Film and Transdermal Drug Market Size

9.2 Oral Thin Film and Transdermal Drug Market by End Use

9.3 Competition by Players/Suppliers

9.4 Oral Thin Film and Transdermal Drug Market Size by Type

9.5 Key Countries Analysis

9.5.1 Brazil

9.5.2 Argentina

9.5.3 Chile

9.5.4 Peru

CHAPTER 10 HISTORICAL AND FORECAST ORAL THIN FILM AND TRANSDERMAL DRUG MARKET IN ASIA & PACIFIC (2020-2030)

10.1 Oral Thin Film and Transdermal Drug Market Size

10.2 Oral Thin Film and Transdermal Drug Market by End Use

10.3 Competition by Players/Suppliers

10.4 Oral Thin Film and Transdermal Drug Market Size by Type

10.5 Key Countries Analysis

10.5.1 China

10.5.2 India

10.5.3 Japan

- 10.5.4 South Korea
- 10.5.5 Southeast Asia
- 10.5.6 Australia

CHAPTER 11 HISTORICAL AND FORECAST ORAL THIN FILM AND TRANSDERMAL DRUG MARKET IN EUROPE (2020-2030)

- 11.1 Oral Thin Film and Transdermal Drug Market Size
- 11.2 Oral Thin Film and Transdermal Drug Market by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Oral Thin Film and Transdermal Drug Market Size by Type
- 11.5 Key Countries Analysis
 - 11.5.1 Germany
 - 11.5.2 France
 - 11.5.3 United Kingdom
 - 11.5.4 Italy
 - 11.5.5 Spain
 - 11.5.6 Belgium
 - 11.5.7 Netherlands
 - 11.5.8 Austria
 - 11.5.9 Poland
 - 11.5.10 Russia

CHAPTER 12 HISTORICAL AND FORECAST ORAL THIN FILM AND TRANSDERMAL DRUG MARKET IN MEA (2020-2030)

- 12.1 Oral Thin Film and Transdermal Drug Market Size
- 12.2 Oral Thin Film and Transdermal Drug Market by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Oral Thin Film and Transdermal Drug Market Size by Type
- 12.5 Key Countries Analysis
 - 12.5.1 Egypt
 - 12.5.2 Israel
 - 12.5.3 South Africa
 - 12.5.4 Gulf Cooperation Council Countries
 - 12.5.5 Turkey

CHAPTER 13 SUMMARY FOR GLOBAL ORAL THIN FILM AND TRANSDERMAL DRUG MARKET (2020-2025)

- 13.1 Oral Thin Film and Transdermal Drug Market Size
- 13.2 Oral Thin Film and Transdermal Drug Market by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Oral Thin Film and Transdermal Drug Market Size by Type

CHAPTER 14 GLOBAL ORAL THIN FILM AND TRANSDERMAL DRUG MARKET FORECAST (2025-2030)

- 14.1 Oral Thin Film and Transdermal Drug Market Size Forecast
- 14.2 Oral Thin Film and Transdermal Drug Application Forecast
- 14.3 Competition by Players/Suppliers
- 14.4 Oral Thin Film and Transdermal Drug Type Forecast

CHAPTER 15 ANALYSIS OF GLOBAL KEY VENDORS

- 15.1 Oramed Pharmaceuticals
 - 15.1.1 Company Profile
 - 15.1.2 Main Business and Oral Thin Film and Transdermal Drug Information
 - 15.1.3 SWOT Analysis of Oramed Pharmaceuticals
 - 15.1.4 Oramed Pharmaceuticals Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)
- 15.2 IntelGenx Technologies Corp.
 - 15.2.1 Company Profile
 - 15.2.2 Main Business and Oral Thin Film and Transdermal Drug Information
 - 15.2.3 SWOT Analysis of IntelGenx Technologies Corp.
 - 15.2.4 IntelGenx Technologies Corp. Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)
- 15.3 BioDelivery Sciences International Inc.
 - 15.3.1 Company Profile
 - 15.3.2 Main Business and Oral Thin Film and Transdermal Drug Information
 - 15.3.3 SWOT Analysis of BioDelivery Sciences International Inc.
 - 15.3.4 BioDelivery Sciences International Inc. Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)
- 15.4 Lexaria Bioscience Corp.
 - 15.4.1 Company Profile
 - 15.4.2 Main Business and Oral Thin Film and Transdermal Drug Information
 - 15.4.3 SWOT Analysis of Lexaria Bioscience Corp.
 - 15.4.4 Lexaria Bioscience Corp. Oral Thin Film and Transdermal Drug Revenue,

Gross Margin and Market Share (2020-2025)

15.5 Taro Pharmaceuticals Industries Ltd.

15.5.1 Company Profile

15.5.2 Main Business and Oral Thin Film and Transdermal Drug Information

15.5.3 SWOT Analysis of Taro Pharmaceuticals Industries Ltd.

15.5.4 Taro Pharmaceuticals Industries Ltd. Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)

15.6 Catalent Inc.

15.6.1 Company Profile

15.6.2 Main Business and Oral Thin Film and Transdermal Drug Information

15.6.3 SWOT Analysis of Catalent Inc.

15.6.4 Catalent Inc. Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)

15.7 Insulet Corporation

15.7.1 Company Profile

15.7.2 Main Business and Oral Thin Film and Transdermal Drug Information

15.7.3 SWOT Analysis of Insulet Corporation

15.7.4 Insulet Corporation Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)

15.8 Nutriband Inc.

15.8.1 Company Profile

15.8.2 Main Business and Oral Thin Film and Transdermal Drug Information

15.8.3 SWOT Analysis of Nutriband Inc.

15.8.4 Nutriband Inc. Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)

15.9 Virpax Pharmaceuticals Inc.

15.9.1 Company Profile

15.9.2 Main Business and Oral Thin Film and Transdermal Drug Information

15.9.3 SWOT Analysis of Virpax Pharmaceuticals Inc.

15.9.4 Virpax Pharmaceuticals Inc. Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)

15.10 Hempfusion Wellness Inc.

15.10.1 Company Profile

15.10.2 Main Business and Oral Thin Film and Transdermal Drug Information

15.10.3 SWOT Analysis of Hempfusion Wellness Inc.

15.10.4 Hempfusion Wellness Inc. Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)

15.11 Gelteq Limited

15.11.1 Company Profile

- 15.11.2 Main Business and Oral Thin Film and Transdermal Drug Information
- 15.11.3 SWOT Analysis of Gelteq Limited
- 15.11.4 Gelteq Limited Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)
- 15.12 Johnson & Johnson
 - 15.12.1 Company Profile
 - 15.12.2 Main Business and Oral Thin Film and Transdermal Drug Information
 - 15.12.3 SWOT Analysis of Johnson & Johnson
 - 15.12.4 Johnson & Johnson Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)
- 15.13 Hisamitsu Pharmaceutical
 - 15.13.1 Company Profile
 - 15.13.2 Main Business and Oral Thin Film and Transdermal Drug Information
 - 15.13.3 SWOT Analysis of Hisamitsu Pharmaceutical
 - 15.13.4 Hisamitsu Pharmaceutical Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)
- 15.14 Teikoku Seiyaku
 - 15.14.1 Company Profile
 - 15.14.2 Main Business and Oral Thin Film and Transdermal Drug Information
 - 15.14.3 SWOT Analysis of Teikoku Seiyaku
 - 15.14.4 Teikoku Seiyaku Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)
- 15.15 Novartis
 - 15.15.1 Company Profile
 - 15.15.2 Main Business and Oral Thin Film and Transdermal Drug Information
 - 15.15.3 SWOT Analysis of Novartis
 - 15.15.4 Novartis Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)
- 15.16 AbbVie
 - 15.16.1 Company Profile
 - 15.16.2 Main Business and Oral Thin Film and Transdermal Drug Information
 - 15.16.3 SWOT Analysis of AbbVie
 - 15.16.4 AbbVie Oral Thin Film and Transdermal Drug Revenue, Gross Margin and Market Share (2020-2025)

Please ask for sample pages for full companies list

Tables and Figures

Table Abbreviation and Acronyms

Table Research Scope of Oral Thin Film and Transdermal Drug Report

Table Data Sources of Oral Thin Film and Transdermal Drug Report

Table Major Assumptions of Oral Thin Film and Transdermal Drug Report
Figure Market Size Estimated Method
Figure Major Forecasting Factors
Figure Oral Thin Film and Transdermal Drug Picture
Table Oral Thin Film and Transdermal Drug Classification
Table Oral Thin Film and Transdermal Drug Applications
Table Drivers of Oral Thin Film and Transdermal Drug Market
Table Restraints of Oral Thin Film and Transdermal Drug Market
Table Opportunities of Oral Thin Film and Transdermal Drug Market
Table Threats of Oral Thin Film and Transdermal Drug Market
Table Covid-19 Impact For Oral Thin Film and Transdermal Drug Market
Table Raw Materials Suppliers
Table Different Production Methods of Oral Thin Film and Transdermal Drug
Table Cost Structure Analysis of Oral Thin Film and Transdermal Drug
Table Key End Users
Table Latest News of Oral Thin Film and Transdermal Drug Market
Table Merger and Acquisition
Table Planned/Future Project of Oral Thin Film and Transdermal Drug Market
Table Policy of Oral Thin Film and Transdermal Drug Market
Table 2020-2030 North America Oral Thin Film and Transdermal Drug Market Size
Figure 2020-2030 North America Oral Thin Film and Transdermal Drug Market Size and CAGR
Table 2020-2030 North America Oral Thin Film and Transdermal Drug Market Size by Application
Table 2020-2025 North America Oral Thin Film and Transdermal Drug Key Players Revenue
Table 2020-2025 North America Oral Thin Film and Transdermal Drug Key Players Market Share
Table 2020-2030 North America Oral Thin Film and Transdermal Drug Market Size by Type
Table 2020-2030 United States Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 Canada Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 Mexico Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 South America Oral Thin Film and Transdermal Drug Market Size
Figure 2020-2030 South America Oral Thin Film and Transdermal Drug Market Size and CAGR
Table 2020-2030 South America Oral Thin Film and Transdermal Drug Market Size by Application
Table 2020-2025 South America Oral Thin Film and Transdermal Drug Key Players

Revenue

Table 2020-2025 South America Oral Thin Film and Transdermal Drug Key Players Market Share

Table 2020-2030 South America Oral Thin Film and Transdermal Drug Market Size by Type

Table 2020-2030 Brazil Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Argentina Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Chile Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Peru Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Asia & Pacific Oral Thin Film and Transdermal Drug Market Size

Figure 2020-2030 Asia & Pacific Oral Thin Film and Transdermal Drug Market Size and CAGR

Table 2020-2030 Asia & Pacific Oral Thin Film and Transdermal Drug Market Size by Application

Table 2020-2025 Asia & Pacific Oral Thin Film and Transdermal Drug Key Players Revenue

Table 2020-2025 Asia & Pacific Oral Thin Film and Transdermal Drug Key Players Market Share

Table 2020-2030 Asia & Pacific Oral Thin Film and Transdermal Drug Market Size by Type

Table 2020-2030 China Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 India Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Japan Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 South Korea Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Southeast Asia Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Australia Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Europe Oral Thin Film and Transdermal Drug Market Size

Figure 2020-2030 Europe Oral Thin Film and Transdermal Drug Market Size and CAGR

Table 2020-2030 Europe Oral Thin Film and Transdermal Drug Market Size by Application

Table 2020-2025 Europe Oral Thin Film and Transdermal Drug Key Players Revenue

Table 2020-2025 Europe Oral Thin Film and Transdermal Drug Key Players Market Share

Table 2020-2030 Europe Oral Thin Film and Transdermal Drug Market Size by Type

Table 2020-2030 Germany Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 France Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 United Kingdom Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Italy Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Spain Oral Thin Film and Transdermal Drug Market Size

Table 2020-2030 Belgium Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 Netherlands Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 Austria Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 Poland Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 Russia Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 MEA Oral Thin Film and Transdermal Drug Market Size
Figure 2020-2030 MEA Oral Thin Film and Transdermal Drug Market Size and CAGR
Table 2020-2030 MEA Oral Thin Film and Transdermal Drug Market Size by Application
Table 2020-2025 MEA Oral Thin Film and Transdermal Drug Key Players Revenue
Table 2020-2025 MEA Oral Thin Film and Transdermal Drug Key Players Market Share
Table 2020-2030 MEA Oral Thin Film and Transdermal Drug Market Size by Type
Table 2020-2030 Egypt Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 Israel Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 South Africa Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 Gulf Cooperation Council Countries Oral Thin Film and Transdermal Drug Market Size
Table 2020-2030 Turkey Oral Thin Film and Transdermal Drug Market Size
Table 2020-2025 Global Oral Thin Film and Transdermal Drug Market Size by Region
Table 2020-2025 Global Oral Thin Film and Transdermal Drug Market Size Share by Region
Table 2020-2025 Global Oral Thin Film and Transdermal Drug Market Size by Application
Table 2020-2025 Global Oral Thin Film and Transdermal Drug Market Share by Application
Table 2020-2025 Global Oral Thin Film and Transdermal Drug Key Vendors Revenue
Figure 2020-2025 Global Oral Thin Film and Transdermal Drug Market Size and Growth Rate
Table 2020-2025 Global Oral Thin Film and Transdermal Drug Key Vendors Market Share
Table 2020-2025 Global Oral Thin Film and Transdermal Drug Market Size by Type
Table 2020-2025 Global Oral Thin Film and Transdermal Drug Market Share by Type
Table 2025-2030 Global Oral Thin Film and Transdermal Drug Market Size by Region
Table 2025-2030 Global Oral Thin Film and Transdermal Drug Market Size Share by Region
Table 2025-2030 Global Oral Thin Film and Transdermal Drug Market Size by Application
Table 2025-2030 Global Oral Thin Film and Transdermal Drug Market Share by Application
Table 2025-2030 Global Oral Thin Film and Transdermal Drug Key Vendors Revenue

Figure 2025-2030 Global Oral Thin Film and Transdermal Drug Market Size and Growth Rate

Table 2025-2030 Global Oral Thin Film and Transdermal Drug Key Vendors Market Share

Table 2025-2030 Global Oral Thin Film and Transdermal Drug Market Size by Type

Table 2025-2030 Oral Thin Film and Transdermal Drug Global Market Share by Type

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