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Europe Highly Potent API Market By Type (Innovative High-Potency APIs and Generic High-Potency APIs), By Type of Synthesis (Synthetic and Biological), By Therapeutic Area (Oncology, Immunology, Hormonal Disorders, Infectious Diseases, and Others), By Type of Manufacturing (In-House and Outsourced), By End User (Biopharmaceutical & Life Science Companies, Contract Drug Manufacturing Organizations, and Research Institutions), By Country, Competition, Forecast and Opportunities, 2020-2030F

https://marketpublishers.com/r/E048C5A45241EN.html
Date: January 2025
Pages: 133
Price: US$ 4,000.00 (Single User License)
ID: E048C5A45241EN

Abstracts

Europe Highly Potent API Market was valued at USD 6.43 Billion in 2024 and is expected to reach USD 11.02 Billion by 2030 with a CAGR of 9.36% during the forecast period. The Europe Highly Potent Active Pharmaceutical Ingredient (API) Market is primarily driven by the increasing demand for cancer therapies, as well as the growing use of biologics and biosimilars. The rise in complex and targeted therapies requiring potent APIs, coupled with the expanding pipeline of oncology drugs, significantly contributes to market growth. Advancements in technology and the demand for personalized medicine have amplified the need for highly potent APIs in small doses, boosting production and development capabilities. Stringent regulatory requirements and the necessity for specialized manufacturing techniques also play a pivotal role in shaping the market dynamics, while increasing focus on outsourcing to contract manufacturing organizations (CMOs) further supports market expansion.

Key Market Drivers

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Increase in Oncology Drug Demand

One of the most significant drivers of the Europe Highly Potent API market is the rapid increase in the demand for oncology drugs. The rise in cancer incidences across Europe, coupled with an aging population, has led to an increased need for effective cancer treatments. Highly potent APIs, which are necessary for the formulation of chemotherapies, immunotherapies, and targeted therapies, are critical in addressing various types of cancer such as breast cancer, lung cancer, prostate cancer, and hematological malignancies. According to a study titled, “The cancer premium – explaining differences in prices for cancer vs non-cancer drugs with efficacy and epidemiological endpoints in the US, Germany, and Switzerland: a cross-sectional study”, in Germany, the average treatment cost for non-cancer drugs was USD 24,179 in 2011 and rose to USD 41,344 in 2020, reflecting an annual average increase of 7.9%. For cancer drugs, the average treatment cost was USD 50,149 in 2011, climbing to USD 71,986 by 2020, with an annual average increase of 4.8%. In Switzerland, the average treatment price for non-cancer drugs was USD 23,984 in 2011, increasing to USD 30,415 by 2020, marking a yearly average rise of 3%. For cancer drugs, the average cost was USD 43,990 in 2011, reaching USD 76,094 in 2020, with an annual average increase of 8.1%.

The growing trend of personalized medicine also plays a major role in boosting the demand for highly potent APIs. As cancer treatments become more tailored to individual patients’ genetic profiles, the development of highly potent drugs and APIs has become a focus. The increasing adoption of monoclonal antibodies (mAbs) and other biologics for cancer treatment requires highly potent APIs due to their specific and highly effective action against cancer cells. The European market, which has one of the highest cancer burdens globally, has witnessed significant growth in the use of innovative therapies involving highly potent APIs.

These highly potent APIs not only improve the efficacy of cancer treatments but also reduce the side effects associated with traditional chemotherapy by targeting cancer cells more precisely. This has fueled the demand for specialized facilities that can safely produce these APIs, leading to further market growth. As the oncology pipeline continues to expand with new drugs entering the market, the demand for highly potent APIs is expected to rise, making oncology one of the largest contributors to the European highly potent API market.

Rising Demand for Biologics & Biosimilars

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The increasing demand for biologics and biosimilars is a significant driver of the European highly potent API market. Biologics, which are large molecule drugs derived from living organisms, require highly potent APIs to achieve their therapeutic effects. Examples include monoclonal antibodies, gene therapies, and cell-based therapies, all of which are essential in treating complex diseases such as cancer, autoimmune disorders, and rare genetic conditions. In March 2024, Abzena, a contract development and manufacturing organization (CDMO) based in the U.K., is set to invest USD 5 million into its manufacturing site in Bristol, Pennsylvania, to accommodate the increasing demand for services related to antibody-drug conjugates (ADCs) and other complex biologics. The investment will cover the addition of new laboratory space, equipment, and various facility upgrades.

Biosimilars, which are similar to biologic drugs but often at a lower cost, have also contributed to the demand for highly potent APIs. The regulatory framework in Europe has made it easier for biosimilars to gain market approval, allowing more patients to access these therapies. As a result, the market for biologics and biosimilars is expanding rapidly, and the production of their highly potent APIs is essential to meet this growing demand.

The European pharmaceutical industry is investing heavily in biologics and biosimilars, and as the demand for these drugs increases, so too does the need for the specialized APIs required for their manufacture. The complexity and potency of biologic drugs mean that specialized facilities and production methods are necessary to ensure their safe and effective production. This trend is expected to continue as the healthcare industry increasingly shifts toward biologics and biosimilars as the treatment of choice for various diseases, further propelling the market for highly potent APIs.

Regulatory Support and Frameworks

Regulatory support and frameworks are crucial drivers of the European highly potent API market. In Europe, the European Medicines Agency (EMA) plays a key role in establishing guidelines and regulations to ensure the safety, efficacy, and quality of highly potent APIs. The EMA has implemented stringent standards for the manufacturing and handling of highly potent compounds, ensuring that only the highest-quality APIs reach the market.

These regulations are designed to safeguard both healthcare workers and patients by establishing clear protocols for the handling, storage, and disposal of potent

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substances. The growing awareness of occupational safety and environmental protection has also led to the development of specialized facilities that can meet these high standards.

The growing number of regulatory approvals for highly potent API-based drugs is encouraging more investment in this sector. As pharmaceutical companies continue to focus on developing novel therapies, particularly in oncology and biologics, they require a clear and supportive regulatory environment to navigate the complexities of producing and commercializing these drugs. The continuous updating of these regulatory frameworks to accommodate emerging trends in drug development and manufacturing will likely continue to drive the market for highly potent APIs in Europe.

Increased Focus on Patient-Centric Drug Development

Patient-centric drug development has become a key driver of the European highly potent API market. Pharmaceutical companies are increasingly focusing on developing treatments that are not only effective but also minimize adverse effects on patients. Highly potent APIs, by their very nature, can offer enhanced efficacy with smaller doses, which means they can be tailored to meet specific patient needs.

This patient-centric approach is particularly evident in the rise of personalized medicine, where treatments are customized based on a patient’s genetic makeup, lifestyle, and specific disease characteristics. Highly potent APIs are essential in such drug formulations as they offer the precision needed for effective treatment while reducing the risk of side effects. Patient-centric drug development involves the use of advanced technologies, such as genomics and biomarkers, which drive the need for highly potent APIs to create more targeted therapies.

As pharmaceutical companies increasingly turn to highly potent APIs to develop drugs that are tailored to individual patients, the market for these APIs in Europe is expected to expand. The shift towards personalized medicine and the focus on improving patient outcomes will continue to be a significant factor driving the demand for highly potent APIs.

Expansion of Contract Manufacturing Organizations (CMOs)

The increasing reliance on Contract Manufacturing Organizations (CMOs) is another important driver of the European highly potent API market. CMOs are outsourcing the production of highly potent APIs to specialized companies that have the expertise and

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facilities required to handle such compounds safely. This trend is particularly prevalent among pharmaceutical companies that do not have the resources or capabilities to manufacture highly potent APIs in-house.

CMOs bring several advantages, including cost-effectiveness, scalability, and access to state-of-the-art manufacturing technologies. They also allow pharmaceutical companies to focus on drug discovery and development while leaving the complex task of API production to experts. With CMOs offering high-quality production facilities and compliance with regulatory standards, the demand for these organizations is expected to continue growing, thus driving the demand for highly potent APIs in Europe.

As the market for highly potent APIs grows, CMOs are investing in specialized equipment and technologies to handle these substances safely, including high-containment systems and cleanroom environments. The growth of the CMO sector in Europe will, therefore, contribute significantly to the expansion of the highly potent API market.

Key Market Challenges

Regulatory Compliance and Safety Concerns

One of the foremost challenges in the European highly potent API market is adhering to stringent regulatory standards for the production, handling, and distribution of highly potent compounds. Highly potent APIs, by their nature, are more dangerous to both workers and the environment. Therefore, regulators in Europe, such as the European Medicines Agency (EMA), require strict safety measures to be in place at every stage of the manufacturing process, from production to packaging. Regulatory bodies enforce guidelines to prevent contamination, ensure the safety of operators, and safeguard public health. The highly regulated nature of the industry presents significant challenges, especially for small to medium enterprises that may lack the resources or expertise required to comply with these regulations. The complexity of regulatory compliance is heightened by the diversity of standards across European countries, which can sometimes result in delays or difficulties in obtaining approvals for new products.

For example, European Union Good Manufacturing Practices (EU GMP) for highly potent APIs demand the use of high-containment systems and specialized production facilities. Ensuring proper containment and isolation of potent compounds to avoid any risk of exposure is an expensive and technologically demanding process. The facilities

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must be equipped with sophisticated systems like isolators, laminar airflow systems, and high-efficiency particulate air (HEPA) filters to control exposure to hazardous substances. Regulatory oversight on safety concerns related to the handling of these potent substances is continuous, and failure to meet these standards can lead to fines, product recalls, or even the suspension of operations. The regulatory environment, while essential for patient and worker safety, can thus be a significant bottleneck, slowing down production timelines and increasing costs. Evolving regulatory frameworks across Europe add to the complexity of navigating compliance, making it difficult for pharmaceutical companies to keep up with changing requirements.

High Production Costs

The production of highly potent APIs involves considerable expenses, which can be a significant challenge for manufacturers. The manufacturing of these APIs requires specialized facilities, technologies, and equipment that ensure safe handling and minimize contamination risks. The need for containment systems, cleanroom environments, and highly controlled production processes results in high capital and operational expenditures. For example, the production of highly potent APIs for cancer therapies or biologics demands extra safety features such as double-glove systems, air filtration units, and sealed equipment to prevent cross-contamination. These investments are substantial, particularly for smaller companies without the financial resources of larger multinational pharmaceutical firms.

The production of highly potent APIs requires careful monitoring and validation to ensure the potency, stability, and quality of the final product. This means that stringent testing, inspections, and quality control measures must be in place at every stage of the production process. The requirement for such detailed scrutiny can delay time-to-market, further raising the cost of production.

Small and medium-sized pharmaceutical companies often find it difficult to bear these high production costs. As a result, many are forced to rely on contract manufacturing organizations (CMOs) that specialize in the production of highly potent APIs. While outsourcing can mitigate some of the costs, it also means that smaller companies must deal with the added challenge of maintaining oversight and ensuring that their CMOs comply with the same stringent quality and safety standards. The high production costs of highly potent APIs can, in turn, increase the final price of drugs, making them more expensive for consumers and healthcare systems. As governments and insurers are under constant pressure to control healthcare spending, the cost factor can limit the market reach of new drugs and may deter the adoption of highly potent therapies. Thus,

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balancing the demand for innovative treatments with cost-effective production remains a key challenge for the industry.

Key Market Trends

Increasing Adoption of Biosimilars

The adoption of biosimilars in Europe is another driver of the highly potent API market. Biosimilars are designed to be highly similar to an already approved biologic drug but are typically offered at a lower cost, making them an attractive option for healthcare systems that are facing rising drug costs. The growing approval and market penetration of biosimilars have created a significant demand for the APIs required to produce these drugs. The Committee for Medicinal Products for Human Use (CHMP) recommended 14 medicines for European Medicines Agency (EMA) approval during its meeting on July 22-25, 2024. Notably, six biosimilar products were given positive opinions, including Samsung Bioepis's EKSUNBI, Formycon AG's FYMSKINA, and Fresenius Kabi Deutschland GmbH's OTULFI for treating various conditions such as plaque psoriasis and psoriatic arthritis, deemed similar to Janssen's STELARA. Reddy Holding GmbH's ITUXREDI was recommended for non-Hodgkin's lymphoma and other diseases, similar to Roche's MabThera. Midas Pharma GmbH's Ranibizumab Midas was recommended for eye conditions, similar to Genentech's LUCENTIS, while Prestige Biopharma's TUZNUE was recommended for breast and gastric cancer, similar to Genentech's HERCEPTIN.

In Europe, biosimilars are gaining approval from regulatory bodies like the EMA, and this trend is expected to continue as more biologic drugs lose patent protection. Since many biosimilars are developed using complex and potent APIs, the growing demand for these products is directly boosting the market for highly potent APIs. The ability to produce biosimilars with high potency and efficacy is essential for these products to compete with originator biologics, and this is driving investment in the production of highly potent APIs.

Technological Advancements in API Production

The growth of the Europe Highly Potent API market can also be attributed to significant technological advancements in API production. The industry has seen the development of safer, more efficient, and scalable production technologies that enable the manufacture of highly potent compounds while ensuring operator safety and minimizing cross-contamination. High-containment systems, such as isolators, closed-loop

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production systems, and high-efficiency particulate air (HEPA) filtration systems, are critical in maintaining the safety and purity of these drugs during manufacturing. In January 2023, EUROAPI announced that its has approved a USD 41.15 million investment to implement a new production technology for vitamin B12 at its Saint-Aubin-l?s-Elbeuf site in France. The project aims to boost manufacturing capacity by 2025 while reducing the environmental impact. The investment is supported by usd 8.13 million in financial assistance from the French Government under the Relance plan, the Seine-Normandie Water Agency (Agence de l'Eau Seine-Normandie), and the Normandy Region.

Technological advancements also include the use of continuous manufacturing processes, which offer significant advantages in terms of scalability, cost-efficiency, and the consistent quality of APIs. These processes allow for better control over the potency and stability of APIs, ensuring that the final products are safe for patient use. Innovations such as automated process control systems and predictive analytics are helping manufacturers optimize production, reduce waste, and enhance quality control.

Another key advancement is the development of specialized handling equipment, such as containment gloves, decontamination systems, and air filtration systems, which protect workers from exposure to potent compounds. These technologies help mitigate the risks associated with handling highly potent substances, enabling the pharmaceutical industry to meet the growing demand for such APIs without compromising on safety or environmental standards. As these technologies continue to evolve, they will further support the growth of the highly potent API market in Europe.

Segmental Insights

Type Insights

Based on the type, Innovative High-Potency APIs are currently dominating the market, driven by the rising demand for novel therapeutic agents, especially in oncology, personalized medicine, and biologics. These APIs are typically used in the production of new drugs that offer targeted treatments for complex diseases, such as cancer, rare genetic disorders, and autoimmune conditions. The dominance of innovative HPAPIs is primarily fuelled by several factors including advancements in drug discovery, a growing preference for biologics, and the high unmet medical needs in areas like oncology and autoimmune diseases.

Innovative HPAPIs are essential in the development of novel biologics and biosimilars,

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especially monoclonal antibodies and gene therapies, which require highly potent substances for their formulations. With the increasing number of targeted therapies in the pipeline, especially in immuno-oncology and personalized medicine, innovative HPAPIs play a critical role in providing patients with more effective treatments with fewer side effects. The demand for innovative HPAPIs is supported by the rise in cancer cases and other chronic diseases that require precision therapies, making them indispensable in the pharmaceutical industry. The regulatory landscape in Europe is increasingly favourable towards the approval of innovative drugs. European health authorities, such as the European Medicines Agency (EMA), are providing accelerated approval pathways for promising therapies, including orphan drugs and advanced biologics, which often involve the use of innovative HPAPIs. These approval mechanisms, such as the Orphan Drug Designation and Fast Track designation, have accelerated the market entry of novel therapies, leading to a surge in the demand for innovative HPAPIs.

Type of Synthesis Insights

Based on the Type of Synthesis, biological highly potent active pharmaceutical ingredients are currently dominating over synthetic highly potent active pharmaceutical ingredients. This trend is largely driven by the increasing demand for biologics in the treatment of complex and chronic diseases, especially in oncology, immunology, and rare genetic disorders. Biologics, which include monoclonal antibodies, recombinant proteins, and gene therapies, have witnessed a significant rise in demand, making biological highly potent active pharmaceutical ingredients the leading segment in the market.

The shift toward biologics has been significantly influenced by the increasing prevalence of cancers, autoimmune diseases, and other chronic conditions that require more targeted and effective treatments. Biologics offer advantages over traditional small molecule drugs, such as greater specificity in targeting diseases, fewer side effects, and better efficacy, particularly in precision medicine and immuno-oncology. These factors have prompted pharmaceutical companies and biopharmaceutical manufacturers to increasingly rely on biologics, including highly potent biological active pharmaceutical ingredients, to develop therapies tailored to specific genetic profiles. This has been a key driver in the market growth for biological highly potent active pharmaceutical ingredients. In addition to this, the approval and growing use of biologics by regulatory agencies, such as the European Medicines Agency, have played a critical role in the dominance of biological highly potent active pharmaceutical ingredients in the market. The accelerated approval processes for biosimilars and the growing number of

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breakthrough therapies have fostered innovation within the biologics space. This has led to a surge in demand for biological highly potent active pharmaceutical ingredients, as pharmaceutical companies strive to develop novel therapies with better efficacy. Biosimilars, which are biologic products that are highly similar to already approved reference biologics, have further bolstered the growth of the biological highly potent active pharmaceutical ingredients market by offering a more cost-effective alternative while maintaining similar therapeutic benefits.

Country Insights

Germany stands out as the dominant player in the Highly Potent Active Pharmaceutical Ingredient (HPAPI) market. This dominance can be attributed to several key factors, including its strong pharmaceutical industry, robust infrastructure for manufacturing and research, and leading role in innovation within the healthcare and pharmaceutical sectors. As Europe’s largest pharmaceutical market, Germany is home to a number of global pharmaceutical companies, contract manufacturing organizations (CMOs), and research institutions, all of which contribute to its leadership in the HPAPI sector.

One of the primary reasons Germany is a leader in the HPAPI market is its well-established pharmaceutical industry. The country boasts a rich history of pharmaceutical research and development, with major multinational pharmaceutical companies such as Bayer, Boehringer Ingelheim, and Merck, as well as numerous smaller biotech firms, having a strong presence in the country. These companies are heavily involved in the development and production of highly potent active pharmaceutical ingredients, particularly in oncology, immunology, and other therapeutic areas requiring highly specialized drugs. The presence of these leading pharmaceutical companies not only fuels innovation but also drives demand for high-quality HPAPIs. Germany’s pharmaceutical manufacturing capabilities are world-renowned for their precision and adherence to international regulatory standards. The country has a well-developed infrastructure for producing HPAPIs, including highly sophisticated and specialized facilities for the manufacture of biologic and synthetic HPAPIs. The strong regulatory framework and compliance with Good Manufacturing Practices (GMP) have positioned Germany as a leader in the HPAPI market, making it a hub for both domestic and international pharmaceutical companies. Many international drug manufacturers choose Germany for contract manufacturing services, capitalizing on the country’s advanced facilities and skilled workforce.

Key Market Players

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Almac Group

Axplora Group GmbH

BASF SE

Corden Pharma International GmbH

Helsinn Healthcare S.A.

Icrom S.p.A.

Lonza Cologne GmbH

Merck KGaA

Sterling Pharma Solutions Limited

Boehringer Ingelheim International GmbH

Report Scope:

In this report, the Europe Highly Potent API Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Europe Highly Potent API Market, By Type:

Innovative High-Potency APIs

Generic High-Potency APIs

Europe Highly Potent API Market, By Type of Synthesis:

Synthetic

Biological

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Europe Highly Potent API Market, By Therapeutic Area:

Oncology

Immunology

Hormonal Disorders

Infectious Diseases

Others

Europe Highly Potent API Market, By Type of Manufacturing:

In-House

Outsourced

Europe Highly Potent API Market, By End User:

Biopharmaceutical & Life Science Companies

Contract Drug Manufacturing Organizations & Research Institutions

Europe Highly Potent API Market, By Country:

Germany

France

United Kingdom

Italy

Spain

Russia

Poland

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Bulgaria

Finland

Portugal

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Europe Highly Potent API Market.

Available Customizations:

Europe Highly Potent API Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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