

Synthetic Hormones Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented by Product (Amino Acid Derivatives, Peptide Hormone, Steroid Hormones), by Route of Administration (Intravenous, Nasal, Oral, Suppository, Topical), by Application (Growth Hormone Deficiency, Male Hypogonadism, Menopause, Thyroid Hormone Deficiency), by End User (Hospital Pharmacies, Online Pharmacies, Retail Pharmacies), by region, and Competition

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Abstracts

Global Synthetic Hormones Market has valued at USD 470.20 million in 2022 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 12.20% through 2028. Synthetic hormones are artificially created or manufactured versions of naturally occurring hormones in the human body. These synthetic hormones have the same chemical structure and function as the hormones produced by the endocrine glands, but they are produced in laboratories rather than within the body. Synthetic hormones are used for various medical purposes, including hormone replacement therapy (HRT), contraception, and the treatment of hormone-related medical conditions. Synthetic hormones are prescribed by healthcare providers to address hormonal imbalances, manage symptoms of hormone-related conditions, and provide contraception. They are used to treat a wide range of conditions, including menopause symptoms, hypothyroidism, hormone-related cancers, and fertility control. Synthetic hormones are used in various forms of contraception, including birth control pills, patches, injections, and intrauterine devices (IUDs). These hormones prevent

pregnancy by inhibiting ovulation, thickening cervical mucus, and altering the uterine lining to make it less receptive to a fertilized egg.

Synthetic hormones are used to manage and treat hormone-related medical conditions such as hypothyroidism, hyperthyroidism, hormone-dependent cancers (e.g., breast cancer, prostate cancer), and disorders like polycystic ovary syndrome (PCOS) and endometriosis. The world's population is aging, particularly in developed countries. As people age, they may experience hormonal imbalances and conditions that require hormone replacement therapy, contributing to the demand for synthetic hormones. The increasing incidence of hormone-related disorders such as hypothyroidism, diabetes, and hormone-dependent cancers is driving the demand for synthetic hormones for therapeutic purposes. Innovations in drug delivery technologies, including transdermal patches, implants, and long acting injectables, have improved the ease of administering synthetic hormones, enhancing patient compliance and convenience. Growing awareness among healthcare professionals and patients about the importance of hormone management and the availability of synthetic hormone therapies is boosting demand.

Key Market Drivers

Increasing Prevalence of Hormone-Related Disorders

Hormone-related disorders encompass a wide range of conditions in which the body's natural hormonal balance is disrupted or impaired. These disorders can affect various systems and functions within the body, and they often require medical intervention. Many hormone-related disorders have become more common in recent years due to factors like lifestyle changes, environmental influences, and genetic predisposition. For example, the incidence of conditions like diabetes, thyroid disorders, and hormonal cancers has been on the rise. As the global population ages, the prevalence of age-related hormone-related disorders, such as menopause-related symptoms in women and hormonal imbalances in men, increases. Aging is a natural factor that can disrupt hormonal balance. Obesity is associated with various hormone-related disorders, including insulin resistance, polycystic ovary syndrome (PCOS), and metabolic syndrome. The global obesity epidemic has contributed to a higher incidence of these conditions. Exposure to environmental toxins, endocrine-disrupting chemicals, and other pollutants can disrupt hormonal systems, potentially leading to hormone-related disorders. Sedentary lifestyles, poor dietary habits, and increased stress levels can impact hormonal balance. These factors can contribute to the development of disorders like adrenal fatigue and insulin resistance.

Greater awareness among healthcare professionals and improved diagnostic techniques have led to earlier detection and diagnosis of hormone-related disorders. Patients are more likely to seek medical help and treatment. Many hormone-related disorders require ongoing management and treatment to alleviate symptoms, prevent complications, and improve quality of life. Synthetic hormones are often prescribed as part of these treatment regimens. For conditions like menopause and hypogonadism, hormone replacement therapy (HRT) using synthetic hormones is a standard treatment approach to relieve symptoms and restore hormonal balance. Pharmaceutical companies continue to develop and refine synthetic hormone treatments, making them more effective, safer, and easier to administer. These advancements encourage both healthcare providers and patients to opt for these therapies. Regulatory agencies, such as the FDA in the United States, have approved synthetic hormone treatments for various indications, providing a clear pathway for healthcare providers to prescribe them. This factor will help in the development of the Global Synthetic Hormones Market.

Rising Hormone Replacement Therapy (HRT)

One of the most well-known applications of HRT is in the management of menopause in women. Menopause is characterized by a decline in natural hormone levels, particularly estrogen and progesterone. HRT helps alleviate menopausal symptoms such as hot flashes, night sweats, mood swings, and vaginal dryness, driving demand among women experiencing these symptoms. HRT is also used to treat hypogonadism, a condition characterized by insufficient production of sex hormones in both men and women. Synthetic hormones like testosterone and estrogen are prescribed to restore hormonal balance and manage related symptoms. Women who have undergone a hysterectomy (removal of the uterus) may experience hormonal imbalances. HRT can help maintain hormonal balance and prevent symptoms related to estrogen deficiency. HRT, particularly with estrogen, is sometimes used for the prevention and treatment of osteoporosis, a condition characterized by weak and brittle bones. Estrogen can help maintain bone density and reduce the risk of fractures.

Some studies suggest that HRT may have cardiovascular benefits in certain populations. Women with specific risk factors for heart disease may be prescribed HRT to help protect against heart-related issues. HRT can be tailored to individual patient needs. Healthcare providers may adjust the type, dosage, and duration of synthetic hormone therapy based on a patient's medical history, symptoms, and preferences. In cases where cancer treatment has led to hormone imbalances, HRT can be used to manage symptoms and improve the quality of life for cancer survivors. HRT is a crucial

component of gender-affirming care for transgender individuals. It involves the use of synthetic hormones to align secondary sexual characteristics with gender identity. HRT can have positive effects on psychological and emotional well-being, including reducing mood swings, anxiety, and depression in individuals experiencing hormone-related imbalances. For many patients, HRT can significantly improve their overall quality of life by alleviating troublesome symptoms associated with hormone deficiencies. This factor will pace up the demand of the Global Synthetic Hormones Market.

Growing Aging Population

With age, the body's natural production of hormones, such as estrogen, progesterone, testosterone, and thyroid hormones, tends to decline. This hormonal decline can lead to a range of symptoms and health issues. Menopausal symptoms in women (e.g., hot flashes, night sweats, vaginal dryness) and andropausal symptoms in men (e.g., fatigue, decreased libido, mood changes) are often linked to age-related hormonal changes. Synthetic hormones, such as estrogen and testosterone replacement therapy, are commonly prescribed to manage these symptoms. As individuals age, they are at an increased risk of osteoporosis, a condition characterized by weakened bones. Hormone replacement therapy, particularly with estrogen, can help maintain bone density and reduce the risk of fractures. Some studies suggest that hormone replacement therapy, particularly in postmenopausal women, may have cardiovascular benefits, such as reducing the risk of heart disease. This can drive demand for synthetic hormones among older adults. Hormone therapy, including estrogen, has been explored for its potential to support cognitive function and reduce the risk of cognitive decline in older adults.

Thyroid hormone imbalances, such as hypothyroidism, become more prevalent with age. Synthetic thyroid hormones are commonly prescribed to manage these conditions. The risk of certain hormone-related cancers, such as breast and prostate cancer, increases with age. Hormone therapies, including synthetic hormones, may be part of the treatment regimen for these cancers. Many older adults seek hormone replacement therapy to improve their overall quality of life by addressing age-related symptoms and health issues. Older adults today are generally more health-conscious and aspire to lead active and fulfilling lives well into their later years. Hormone therapies can support this goal by managing age-related health challenges. As people age, they become more aware of the physical and emotional changes associated with aging and are more likely to seek medical advice and treatment options, including hormone replacement therapy. This factor will accelerate the demand of the Global Synthetic Hormones Market.

Key Market Challenges

Competition from Bioidentical Hormones

Some consumers prefer bioidentical hormones because they believe they are more 'natural' and are less likely to cause adverse effects. This preference can lead to a shift in demand away from traditional synthetic hormones. Bioidentical hormones are often marketed as having fewer side effects and safety concerns compared to traditional synthetic hormones. This perception can influence patients' and healthcare providers' choices when selecting hormone replacement therapies. Bioidentical hormones are often compounded on an individual basis by compounding pharmacies to meet a patient's specific needs. This customization can make bioidentical hormones more attractive to patients seeking personalized treatment regimens. Bioidentical hormone products are sometimes marketed aggressively, highlighting their perceived benefits over traditional synthetic hormones. This marketing can sway consumer and prescriber preferences. Bioidentical hormones may face different regulatory oversight compared to synthetic hormones. In some regions, they may be classified as dietary supplements rather than pharmaceuticals, potentially leading to variations in quality and safety standards. There is an ongoing scientific debate about the safety and efficacy of bioidentical hormones compared to traditional synthetic hormones. This debate can create confusion among patients and healthcare providers. The compounding of bioidentical hormones can result in variability in the formulations and dosages of these products. This variability can make it challenging to establish consistent treatment protocols. Insurance coverage for bioidentical hormones may be less common than for traditional synthetic hormones, leading to higher out-of-pocket costs for patients. Bioidentical hormones may not have as extensive a body of clinical research and data supporting their safety and efficacy as traditional synthetic hormones. This can affect prescriber confidence in their use.

Patent Expirations

Once a patent expires, generic drug manufacturers can produce and market generic versions of the formerly patented synthetic hormone drug. Generic competition typically leads to lower drug prices, which can reduce the market share and profitability of the brand-name synthetic hormone. With the entry of generic competitors, prices for the synthetic hormone drug can decline significantly. This can impact the revenue generated by the drug, especially for the original manufacturer. As generic versions become available, they may gain a substantial share of the market, especially if they are priced significantly lower than the brand-name drug. This can lead to a reduced market

share for the original drug. Patent expirations often result in a decline in the revenue generated by the brand-name synthetic hormone drug. This can impact the financial health of the pharmaceutical company that developed and marketed the drug. The entry of generic competitors can intensify competition within the market. Pharmaceutical companies may need to invest more in marketing and promotion to maintain market share. Before patent expiration, the original manufacturer of the synthetic hormone drug typically holds a monopoly on its sale. After patent expiration, multiple manufacturers can produce the drug, reducing the original company's exclusive control over the market. The influx of generic versions of the synthetic hormone drug can saturate the market, making it more challenging for all manufacturers to maintain profitability.

Key Market Trends

Focus on Personalized Medicine

Personalized medicine allows healthcare providers to select the most appropriate synthetic hormone therapy and dosage for each patient based on their specific hormonal imbalances, genetics, and response to treatment. This can lead to more effective and efficient treatment outcomes. By considering individual patient factors, including genetic variations and susceptibility to side effects, personalized medicine aims to minimize adverse reactions to synthetic hormones, improving patient safety and compliance. For conditions such as menopause or hypogonadism, personalized medicine enables the customization of hormone replacement therapy (HRT) to meet the unique needs of each patient. This can result in more precise symptom relief and hormonal balance. Personalized medicine may involve genetic testing to identify individuals at higher risk for hormone-related disorders or cancers. Such insights can lead to early intervention and prevention strategies. Continuous monitoring of patients' response to synthetic hormone therapies, including hormonal levels and symptom improvement, allows for real-time adjustments to treatment plans, ensuring optimal outcomes. Genetic testing and the identification of biomarkers can help identify patients who are most likely to benefit from specific synthetic hormone treatments, improving the cost-effectiveness of therapies. In the context of hormone-related cancers (e.g., breast, prostate), personalized medicine can guide treatment decisions, including the use of hormone therapies and targeted therapies tailored to the individual's cancer genetics. Personalized medicine aims to reduce overtreatment by avoiding unnecessary hormonal interventions for individuals who do not require them, thus minimizing potential risks and costs.

Segmental Insights

Type Insights

In 2022, the Global Synthetic Hormones Market largest share was held by Steroid Hormones segment and is predicted to continue expanding over the coming years. Steroid hormones, such as corticosteroids and sex hormones (e.g., estrogen and testosterone), play crucial roles in various physiological functions. They are used for a wide range of medical indications, including hormone replacement therapy, anti-inflammatory treatments, and managing hormone-related disorders. Hormone replacement therapy (HRT) is a common medical application of steroid hormones. Postmenopausal women, for example, may receive estrogen replacement therapy to manage symptoms of menopause, such as hot flashes and vaginal dryness. Corticosteroids, such as prednisone and dexamethasone, have potent anti-inflammatory and immunosuppressive properties. They are prescribed to treat a variety of conditions, including autoimmune diseases, allergies, and inflammatory disorders.

Route of Administration Insights

In 2022, the Global Synthetic Hormones Market largest share was held by Oral segment and is predicted to continue expanding over the coming years. Many patients prefer oral medications because they are easy to take, convenient, and do not require injections or other invasive methods. Convenience and patient comfort play a crucial role in the choice of administration route. Oral synthetic hormone medications are widely available and are commonly prescribed by healthcare providers. They are accessible in various forms, including tablets and capsules. Oral medications often offer dosing flexibility. Healthcare providers can adjust the dose as needed for individual patients, which is important in hormone replacement therapy and other hormone-related treatments. Pharmaceutical companies continue to develop and improve oral formulations of synthetic hormones, enhancing their effectiveness and patient compliance.

Application Insights

In 2022, the Global Synthetic Hormones Market largest share was held by Male Hypogonadism segment and is predicted to continue expanding over the coming years. Male hypogonadism is a medical condition characterized by low levels of testosterone, and it can affect a significant portion of the male population, especially as men age. As a result, there may be a substantial demand for synthetic hormones to treat this condition. The global population is aging, and with age, there is a natural decline in testosterone levels in men. This demographic trend may increase the prevalence of

male hypogonadism and drive demand for synthetic hormone therapies. Increased awareness of male hypogonadism among both healthcare providers and patients may lead to more diagnoses and treatments. This can contribute to a larger market share for this segment. Synthetic hormones, such as testosterone replacement therapy, can effectively manage the symptoms of male hypogonadism, including fatigue, low libido, and mood changes. The effectiveness of these treatments may drive demand.

End-User Insights

In 2022, the Global Synthetic Hormones Market largest share was held by Retail Pharmacies segment in the forecast period and is predicted to continue expanding over the coming years. Retail pharmacies are widely distributed and easily accessible to the general population. Patients can visit their local retail pharmacies to fill prescriptions for synthetic hormones, making it a convenient option for obtaining these medications. Many synthetic hormones are prescription medications, and retail pharmacies are equipped to handle prescription-based dispensing. Healthcare providers often prescribe synthetic hormones to patients, who then rely on retail pharmacies to obtain their medications. Retail pharmacists play a crucial role in patient education. They can provide information about the proper use, dosage, potential side effects, and interactions of synthetic hormones, ensuring that patients understand how to take their medications safely and effectively. Retail pharmacies often work with various health insurance plans, which can cover a significant portion of the cost of synthetic hormone prescriptions. This can make obtaining synthetic hormones more affordable for patients, as insurance coverage reduces out-of-pocket expenses.

Regional Insights

The North America region dominates the Global Synthetic Hormones Market in 2022. North America, particularly the United States and Canada, has a significant and aging population. The aging demographic is more likely to require hormone replacement therapies and treatments for hormone-related conditions, such as menopause, hypothyroidism, and hormonal cancers. This creates a substantial demand for synthetic hormones. North America boasts a highly developed and technologically advanced healthcare infrastructure. This infrastructure supports the diagnosis and treatment of hormone-related disorders, including the prescription and administration of synthetic hormones. There is a high level of healthcare awareness in North America, leading to early diagnosis and treatment of hormone-related disorders. Increased awareness among both healthcare professionals and the general population contributes to the higher utilization of synthetic hormones.

Key Market Players

Acerus Pharmaceuticals Corp.

American Regent, Inc.

Anhui Anke Biotechnology (Group) Co. Ltd.

BioPartners, Inc

Eli Lilly and Company

Endo Pharmaceuticals, Inc.

F. Hoffmann-La Roche Ltd.

IBSA Institut Biochimique SA

Lupin Pharmaceuticals, Inc.

Pfizer, Inc

Report Scope:

In this report, the Global Synthetic Hormones Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Synthetic Hormones Market, By Product:

Amino Acid Derivatives

Peptide Hormone

Steroid Hormones

Synthetic Hormones Market, By Route of Administration:

Intravenous

Nasal

Oral

Suppository

Topical

Synthetic Hormones Market, By Application:

Growth Hormone Deficiency

Male Hypogonadism

Menopause

Thyroid Hormone Deficiency

Synthetic Hormones Market, By End-User:

Hospital Pharmacies

Online Pharmacies

Retail Pharmacies

Global Synthetic Hormones Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

Japan

Europe

Germany

France

United Kingdom

Spain

Italy

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Synthetic Hormones Market.

Available Customizations:

Global Synthetic Hormones Market report with the given market data, Tech Sci 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL SYNTHETIC HORMONES MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Amino Acid Derivatives, Peptide Hormone, Steroid Hormones)
 - 5.2.2. By Route of Administration (Intravenous, Nasal, Oral, Suppository, Topical)
 - 5.2.3. By Application (Growth Hormone Deficiency, Male Hypogonadism, Menopause,

Thyroid Hormone Deficiency)

5.2.4. By End User (Hospital Pharmacies, Online Pharmacies, Retail Pharmacies)

5.2.5. By Region

5.2.6. By Company (2022)

5.3. Market Map

6. ASIA PACIFIC SYNTHETIC HORMONES MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product

6.2.2. By Route of Administration

6.2.3. By Application

6.2.4. By End User

6.2.5. By Country

6.3. Asia Pacific: Country Analysis

6.3.1. China Synthetic Hormones Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Product

6.3.1.2.2. By Route of Administration

6.3.1.2.3. By Application

6.3.1.2.4. By End User

6.3.2. India Synthetic Hormones Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Product

6.3.2.2.2. By Route of Administration

6.3.2.2.3. By Application

6.3.2.2.4. By End User

6.3.3. Australia Synthetic Hormones Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Product

6.3.3.2.2. By Route of Administration

- 6.3.3.2.3. By Application
- 6.3.3.2.4. By End User
- 6.3.4. Japan Synthetic Hormones Market Outlook
 - 6.3.4.1. Market Size & Forecast
 - 6.3.4.1.1. By Value
 - 6.3.4.2. Market Share & Forecast
 - 6.3.4.2.1. By Product
 - 6.3.4.2.2. By Route of Administration
 - 6.3.4.2.3. By Application
 - 6.3.4.2.4. By End User
- 6.3.5. South Korea Synthetic Hormones Market Outlook
 - 6.3.5.1. Market Size & Forecast
 - 6.3.5.1.1. By Value
 - 6.3.5.2. Market Share & Forecast
 - 6.3.5.2.1. By Product
 - 6.3.5.2.2. By Route of Administration
 - 6.3.5.2.3. By Application
 - 6.3.5.2.4. By End User

7. EUROPE SYNTHETIC HORMONES MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product
 - 7.2.2. By Route of Administration
 - 7.2.3. By Application
 - 7.2.4. By End User
 - 7.2.5. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. France Synthetic Hormones Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Product
 - 7.3.1.2.2. By Route of Administration
 - 7.3.1.2.3. By Application
 - 7.3.1.2.4. By End User
 - 7.3.2. Germany Synthetic Hormones Market Outlook

- 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
- 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Product
 - 7.3.2.2.2. By Route of Administration
 - 7.3.2.2.3. By Application
 - 7.3.2.2.4. By End User
- 7.3.3. Spain Synthetic Hormones Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Product
 - 7.3.3.2.2. By Route of Administration
 - 7.3.3.2.3. By Application
 - 7.3.3.2.4. By End User
- 7.3.4. Italy Synthetic Hormones Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product
 - 7.3.4.2.2. By Route of Administration
 - 7.3.4.2.3. By Application
 - 7.3.4.2.4. By End User
- 7.3.5. United Kingdom Synthetic Hormones Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Product
 - 7.3.5.2.2. By Route of Administration
 - 7.3.5.2.3. By Application
 - 7.3.5.2.4. By End User

8. NORTH AMERICA SYNTHETIC HORMONES MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Product
 - 8.2.2. By Route of Administration

- 8.2.3. By Application
- 8.2.4. By End User
- 8.2.5. By Country
- 8.3. North America: Country Analysis
 - 8.3.1. United States Synthetic Hormones Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product
 - 8.3.1.2.2. By Route of Administration
 - 8.3.1.2.3. By Application
 - 8.3.1.2.4. By End User
 - 8.3.2. Mexico Synthetic Hormones Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product
 - 8.3.2.2.2. By Route of Administration
 - 8.3.2.2.3. By Application
 - 8.3.2.2.4. By End User
 - 8.3.3. Canada Synthetic Hormones Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product
 - 8.3.3.2.2. By Route of Administration
 - 8.3.3.2.3. By Application
 - 8.3.3.2.4. By End User

9. SOUTH AMERICA SYNTHETIC HORMONES MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product
 - 9.2.2. By Route of Administration
 - 9.2.3. By Application
 - 9.2.4. By End User
 - 9.2.5. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Synthetic Hormones Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Product

9.3.1.2.2. By Route of Administration

9.3.1.2.3. By Application

9.3.1.2.4. By End User

9.3.2. Argentina Synthetic Hormones Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Product

9.3.2.2.2. By Route of Administration

9.3.2.2.3. By Application

9.3.2.2.4. By End User

9.3.3. Colombia Synthetic Hormones Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Product

9.3.3.2.2. By Route of Administration

9.3.3.2.3. By Application

9.3.3.2.4. By End User

10. MIDDLE EAST AND AFRICA SYNTHETIC HORMONES MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Product

10.2.2. By Route of Administration

10.2.3. By Application

10.2.4. By End User

10.2.5. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Synthetic Hormones Market Outlook

10.3.1.1. Market Size & Forecast

- 10.3.1.1.1. By Value
- 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Product
 - 10.3.1.2.2. By Route of Administration
 - 10.3.1.2.3. By Application
 - 10.3.1.2.4. By End User
- 10.3.2. Saudi Arabia Synthetic Hormones Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Product
 - 10.3.2.2.2. By Route of Administration
 - 10.3.2.2.3. By Application
 - 10.3.2.2.4. By End User
- 10.3.3. UAE Synthetic Hormones Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Product
 - 10.3.3.2.2. By Route of Administration
 - 10.3.3.2.3. By Application
 - 10.3.3.2.4. By End User

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Recent Developments
- 12.2. Product Launches
- 12.3. Mergers & Acquisitions

13. GLOBAL SYNTHETIC HORMONES MARKET: SWOT ANALYSIS

14. PORTER'S FIVE FORCES ANALYSIS

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Product

15. PESTLE ANALYSIS

16. COMPETITIVE LANDSCAPE

- 16.1. Acerus Pharmaceuticals Corp.
 - 16.1.1. Business Overview
 - 16.1.2. Company Snapshot
 - 16.1.3. Products & Services
 - 16.1.4. Financials (In case of listed companies)
 - 16.1.5. Recent Developments
 - 16.1.6. SWOT Analysis
- 16.2. American Regent, Inc.
 - 16.2.1. Business Overview
 - 16.2.2. Company Snapshot
 - 16.2.3. Products & Services
 - 16.2.4. Financials (In case of listed companies)
 - 16.2.5. Recent Developments
 - 16.2.6. SWOT Analysis
- 16.3. Anhui Anke Biotechnology (Group) Co. Ltd.
 - 16.3.1. Business Overview
 - 16.3.2. Company Snapshot
 - 16.3.3. Products & Services
 - 16.3.4. Financials (In case of listed companies)
 - 16.3.5. Recent Developments
 - 16.3.6. SWOT Analysis
- 16.4. BioPartners, Inc.
 - 16.4.1. Business Overview
 - 16.4.2. Company Snapshot
 - 16.4.3. Products & Services
 - 16.4.4. Financials (In case of listed companies)
 - 16.4.5. Recent Developments
 - 16.4.6. SWOT Analysis

- 16.5. Eli Lilly and Company
 - 16.5.1. Business Overview
 - 16.5.2. Company Snapshot
 - 16.5.3. Products & Services
 - 16.5.4. Financials (In case of listed companies)
 - 16.5.5. Recent Developments
 - 16.5.6. SWOT Analysis
- 16.6. Endo Pharmaceuticals, Inc.
 - 16.6.1. Business Overview
 - 16.6.2. Company Snapshot
 - 16.6.3. Products & Services
 - 16.6.4. Financials (In case of listed companies)
 - 16.6.5. Recent Developments
 - 16.6.6. SWOT Analysis
- 16.7. F. Hoffmann-La Roche Ltd.
 - 16.7.1. Business Overview
 - 16.7.2. Company Snapshot
 - 16.7.3. Products & Services
 - 16.7.4. Financials (In case of listed companies)
 - 16.7.5. Recent Developments
 - 16.7.6. SWOT Analysis
- 16.8. IBSA Institut Biochimique SA
 - 16.8.1. Business Overview
 - 16.8.2. Company Snapshot
 - 16.8.3. Products & Services
 - 16.8.4. Financials (In case of listed companies)
 - 16.8.5. Recent Developments
 - 16.8.6. SWOT Analysis
- 16.9. Lupin Pharmaceuticals, Inc.
 - 16.9.1. Business Overview
 - 16.9.2. Company Snapshot
 - 16.9.3. Products & Services
 - 16.9.4. Financials (In case of listed companies)
 - 16.9.5. Recent Developments
 - 16.9.6. SWOT Analysis
- 16.10. Pfizer, Inc.
 - 16.10.1. Business Overview
 - 16.10.2. Company Snapshot
 - 16.10.3. Products & Services

16.10.4. Financials (In case of listed companies)

16.10.5. Recent Developments

16.10.6. SWOT Analysis

17. STRATEGIC RECOMMENDATIONS

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