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Unit Dose Manufacturing Market - Global Industry Size, Share, Trends, Opportunity & Forecast, Segmented by Sourcing (In-house, Outsourcing), By Product (Liquid Unit Dose, Solid Unit Dose, Others), By End User (Independent Pharmacies, Long-Term Care Facility, Hospitals, Others), By Region & Competition, 2019-2029F

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Abstracts

Global Unit Dose Manufacturing Market was valued at USD 25.98 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 10.95% through 2029. The global unit dose manufacturing market is a specialized segment within the pharmaceutical and healthcare industries that focuses on the production and distribution of medications in pre-measured, individual doses. This packaging and manufacturing solution is becoming increasingly popular due to its precise dosing, ease of use, improved patient compliance, and enhanced safety.

Key Market Drivers

Rising Focus on Patient Safety and Compliance

The rising focus on patient safety and compliance is a critical driver of growth in the global unit dose manufacturing market. As healthcare systems worldwide become more complex, ensuring safe and accurate medication administration has emerged as a top priority. Unit dose packaging, which involves dispensing medications in pre-measured, individual doses, offers significant advantages in reducing medication errors and improving patient adherence to prescribed therapies. This focus on safety and compliance is influencing pharmaceutical companies, healthcare providers, and

regulatory bodies to adopt unit dose packaging solutions at an accelerating rate. Medication errors, such as incorrect dosing or administering the wrong drug, are a significant concern in both hospitals and home care settings. These errors can lead to severe health complications, increased hospitalizations, and even death. Unit dose packaging significantly reduces these risks by providing pre-packaged, exact doses of medication. By delivering medications in precise quantities, unit dose packaging eliminates the need for healthcare providers or patients to measure doses manually, which reduces human error. This is particularly beneficial in fast-paced healthcare environments such as hospitals and long-term care facilities, where staff may handle multiple medications under time pressure. Each unit dose is individually packaged and clearly labeled, often with barcodes or RFID tags, allowing for easy identification and tracking of medication. This enables healthcare providers to verify the correct medication is being given to the right patient, reducing the risk of mix-ups. In addition, barcoding at the unit-dose level is often required by regulatory agencies like the FDA, further promoting its use.

Patient non-compliance with prescribed medication regimens is a widespread issue that can lead to poor health outcomes and higher healthcare costs. Unit dose packaging helps address this problem by simplifying medication administration for patients, especially those with chronic conditions or complex medication regimens. Unit dose packaging makes it easier for patients to follow their treatment plans. By providing pre-measured doses, patients no longer have to worry about measuring liquids or dividing tablets. This ease of use improves compliance, particularly among older adults and individuals managing multiple medications. Misunderstanding dosage instructions is a common issue, especially for elderly patients or those with limited health literacy. Unit dose packaging ensures patients take the correct amount of medication at the right time, reducing the risk of over-dosing (which can cause toxicity) or under-dosing (which may render the treatment ineffective). Regulatory bodies worldwide are increasingly prioritizing patient safety, which has led to new standards and guidelines that promote the use of unit dose packaging. In the U.S., the Food and Drug Administration (FDA) has set stringent guidelines for medication safety. For example, the FDA’s barcoding rule mandates that all prescription medications intended for hospital use must have barcodes, and unit dose packaging is often the best way to comply with these regulations. Similar requirements are enforced by the European Medicines Agency (EMA) and other global regulatory bodies. Unit dose packaging offers better traceability throughout the supply chain. Each package can be uniquely identified, improving tracking and monitoring in case of recalls or adverse drug reactions. This enhances overall pharmacovigilance and aligns with growing regulatory demands for transparency and safety across the pharmaceutical industry.

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Increase in Chronic Disease Prevalence

The increase in chronic disease prevalence is a significant driver of growth in the global unit dose manufacturing market. Chronic diseases such as cardiovascular disorders, diabetes, respiratory conditions, and cancer require long-term treatment, often involving multiple medications. These conditions, along with the growing aging population, demand efficient and precise medication management systems to ensure effective treatment and reduce healthcare risks. Unit dose manufacturing provides a solution by offering pre-measured, patient-friendly dosing formats that support adherence to complex medication regimens, making it an essential player in addressing the challenges posed by chronic disease management. Chronic conditions like diabetes, hypertension, asthma, and cardiovascular diseases often require patients to take daily medications for life, or at least for extended periods. These conditions are not only widespread but are growing in prevalence due to factors such as aging populations, sedentary lifestyles, poor dietary habits, and rising obesity rates globally. Many patients with chronic diseases are prescribed multiple medications simultaneously, a practice known as polypharmacy. Managing multiple drugs increases the risk of medication errors, particularly for elderly patients or those with cognitive impairments. Unit dose packaging simplifies the process by providing clearly labeled, pre-measured doses, which enhances patient safety and reduces the chances of taking incorrect or missed doses. Chronic diseases often require medication to be taken at specific times and in precise quantities to maintain effective therapeutic levels in the body. Unit dose packaging facilitates this by ensuring that patients receive exactly the right dose at the right time, which is critical for conditions like hypertension or diabetes, where small deviations in dosing can lead to severe health complications.

The global aging population, particularly in regions like North America, Europe, and parts of Asia, is a major contributor to the rise in chronic disease prevalence. As people age, the likelihood of developing chronic conditions increases, leading to a higher demand for ongoing medication management. Older adults, who are more likely to suffer from multiple chronic conditions, often have difficulties managing complex medication schedules. Unit dose packaging provides a user-friendly solution by offering medications in easy-to-understand, pre-packaged doses that are ready for immediate use. This reduces the cognitive burden on elderly patients and helps prevent potentially dangerous dosing errors. In many cases, caregivers are responsible for administering medications to elderly patients. Unit dose packaging simplifies the process for caregivers by ensuring the correct dosage is always provided, thereby reducing the risk of mistakes. This can also alleviate stress and improve the overall quality of care for

elderly patients. For chronic diseases, medication adherence—following the prescribed treatment regimen exactly as directed—is a critical factor in ensuring positive health outcomes. Non-adherence to medication regimens can lead to worsening symptoms, disease progression, hospitalizations, and increased healthcare costs. The World Health Organization (WHO) estimates that 50% of patients with chronic diseases do not take their medications as prescribed, which has become a significant public health issue. Unit dose packaging promotes better medication adherence by making it easier for patients to follow their treatment regimens. The pre-packaged, ready-to-use doses are more convenient and reduce confusion about when and how much medication to take. This is particularly important for patients with cognitive impairments or complex medication schedules, where adherence is more challenging. In some cases, patients with chronic conditions may require adjustments to their dosages based on periodic monitoring of their condition. Unit dose packaging allows pharmaceutical companies and healthcare providers to offer personalized dosing solutions, ensuring that each patient receives the appropriate amount of medication based on their specific needs.

Technological Advancements in Packaging and Manufacturing

Technological advancements in packaging and manufacturing are pivotal drivers of growth in the global unit dose manufacturing market. As the demand for safer, more efficient, and cost-effective pharmaceutical delivery solutions rises, innovations in packaging materials, automation, and digital integration are transforming the landscape. These advancements not only enhance production efficiency and product quality but also cater to evolving market needs such as personalized medicine, sustainability, and patient convenience. One of the most transformative factors in the growth of the unit dose manufacturing market is the integration of automation and robotics in production processes. Advanced machinery capable of high-speed, precise manufacturing has drastically improved efficiency and accuracy in producing unit dose medications. Automation allows pharmaceutical manufacturers to produce unit doses at significantly higher speeds without compromising on accuracy. This results in higher output, meeting the growing global demand for unit dose packaging while maintaining consistent quality standards. Automated systems can handle large volumes of production, allowing for scalable solutions that are crucial for global markets. By reducing manual handling during the packaging process, automation lowers the risk of human error, particularly in complex unit dose formats such as blister packs or pre-filled syringes. This improves overall product safety, which is critical for medications that require precise dosing, such as injectables and oral solids. Automated processes also reduce labor costs and the time required for production, ultimately lowering the cost of goods sold (COGS). This efficiency makes unit dose packaging more accessible to a broader range of

pharmaceutical products, driving further adoption by manufacturers.

The advent of smart packaging technology is revolutionizing the unit dose manufacturing market by incorporating features that enhance patient adherence, monitoring, and safety. These intelligent systems help healthcare providers track medication use and give patients digital reminders, which is especially valuable in chronic disease management. Smart packaging can be embedded with technologies such as QR codes, RFID chips, or NFC (Near Field Communication) tags, enabling digital tracking of medication administration. These features help healthcare professionals monitor whether patients are adhering to their medication regimens, reducing non-compliance and improving overall therapeutic outcomes. For instance, blister packs with embedded sensors can notify healthcare providers when a patient misses a dose, triggering timely interventions. Smart packaging that connects to mobile apps can send reminders to patients when it's time to take their medication, significantly improving adherence rates, especially for elderly patients or those managing multiple chronic conditions. This type of packaging also has potential applications in personalized medicine, where customized doses and schedules are essential. Smart packaging solutions offer robust anti-counterfeiting measures by embedding unique digital identifiers that allow for secure tracking throughout the supply chain. This is particularly important in the pharmaceutical industry, where counterfeit medications are a serious global issue. Serialization ensures that each unit dose is traceable, enhancing supply chain integrity and patient safety.

Technological advancements in packaging materials are allowing for more efficient, sustainable, and patient-friendly solutions in unit dose manufacturing. These new materials offer benefits in terms of safety, product protection, and environmental sustainability, which are increasingly important considerations for pharmaceutical companies and regulators. Innovations in barrier films and coatings enhance the protection of sensitive medications from environmental factors such as moisture, oxygen, and light, which can degrade the product's efficacy. For example, multi-layer blister packs provide superior protection for pharmaceuticals, extending their shelf life and ensuring that they maintain their potency until they reach the patient. With increasing pressure from regulators and consumers to reduce the environmental impact of pharmaceutical products, manufacturers are developing sustainable packaging solutions. Biodegradable and recyclable materials are becoming more common in unit dose packaging, meeting the growing demand for eco-friendly options without compromising product safety. This aligns with global sustainability goals and regulatory mandates on reducing plastic waste. Innovations in material science have also led to the development of lighter yet more durable packaging materials, which reduce

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transportation costs and minimize the risk of damage during shipping. This is especially important for international distribution, where packaging needs to endure long transit times and varying environmental conditions

Key Market Challenges

High Manufacturing and Initial Setup Costs

One of the most significant challenges facing the global unit dose manufacturing market is the high cost of manufacturing and setting up specialized production lines. The transition to unit dose manufacturing requires substantial capital investments in automated machinery, advanced packaging systems, and production technologies, which can be a barrier, especially for small- and mid-sized pharmaceutical companies. Unit dose manufacturing requires highly specialized equipment for packaging medications in pre-measured, individual doses. This equipment includes automated filling lines, blister packaging machines, and labeling systems that must adhere to strict accuracy and safety standards. The cost of purchasing, installing, and maintaining this equipment is significantly higher than traditional bulk packaging systems. This capital intensity can deter companies from investing in unit dose formats, especially those with limited financial resources or smaller-scale production requirements.

While unit dose packaging provides benefits in terms of safety and compliance, the per-unit cost of producing individual doses is typically higher than bulk packaging. This is because the packaging material, precision machinery, and added labor involved in unit dosing add to the overall cost. These increased costs can make unit dose packaging less attractive, particularly for generic drug manufacturers or companies producing low-margin drugs. Implementing unit dose manufacturing also requires pharmaceutical companies to upgrade their infrastructure, including clean rooms, sterility controls, and quality assurance processes. The need for precise dosing, coupled with strict regulatory requirements, necessitates highly controlled environments, increasing both the initial setup and ongoing operational costs. This challenge is particularly relevant for companies operating in emerging markets, where capital resources may be limited, and access to cutting-edge technology is less readily available.

Regulatory and Compliance Complexities

The pharmaceutical industry is highly regulated, and the stringent regulatory requirements governing unit dose packaging present another significant challenge for market growth. Different countries and regions impose various standards and guidelines

regarding drug packaging, labeling, and traceability, making it difficult for manufacturers to ensure compliance across multiple markets. The unit dose manufacturing market is subject to stringent regulatory oversight by agencies such as the U.S. Food and Drug Administration (FDA), European Medicines Agency (EMA), and other global health authorities. These regulations are designed to ensure the safety, quality, and efficacy of pharmaceuticals. However, navigating these diverse regulatory frameworks can be difficult, particularly for multinational companies aiming to launch unit dose packaging in different regions. Varying requirements around packaging materials, dose accuracy, labeling standards, and serialization increase the complexity of compliance.

For example, serialization mandates, which require unique identification numbers on each unit dose for traceability, vary significantly by country. Meeting these differing standards can lead to production delays, increased costs, and the need for customized packaging lines, further complicating operations. Unit dose packaging requires highly accurate and precise dosing, which demands rigorous quality control and validation processes. Regulatory agencies require pharmaceutical manufacturers to implement Good Manufacturing Practices (GMP), quality-by-design (QbD) approaches, and continuous process verification. The stringent nature of these requirements adds to the operational burden for manufacturers, who must ensure that each dose is consistent, properly labeled, and free from contamination.

Failure to meet these standards can result in regulatory penalties, product recalls, or delays in product approvals. The cost of maintaining high-quality standards, coupled with the risk of non-compliance, creates a significant barrier for companies considering investment in unit dose packaging.

Key Market Trends

Increased Adoption of Personalized and Precision Medicine

One of the most impactful trends driving the future growth of the unit dose manufacturing market is the rising adoption of personalized and precision medicine. As the healthcare industry shifts toward more targeted treatments based on individual patient profiles, unit dose packaging is becoming increasingly critical for delivering personalized care. Personalized medicine requires medications to be tailored to each patient’s specific genetic makeup, condition, or lifestyle factors. This has led to a growing need for customized dosing, where unit dose packaging allows for precise administration of the right amount of medication for each individual. This is particularly important in therapeutic areas such as oncology, rare diseases, and genetic disorders,

where patients may require highly specific doses or combinations of drugs. Unit dose manufacturing offers the flexibility to produce small batches of customized doses, aligning with the growing demand for personalized therapies. The ability to provide precise, pre-measured doses reduces the risk of dosing errors and enhances patient outcomes, making it a key driver of growth in the unit dose market.

The rise of biologics and other specialty drugs, which often require complex dosing regimens, has further fueled the need for unit dose packaging. These medications are typically more sensitive to environmental factors and require accurate dosing to ensure their efficacy. Unit dose packaging not only preserves the integrity of these drugs but also simplifies their administration, particularly in settings such as home care or outpatient treatment. As pharmaceutical companies continue to invest in biologics and specialty drugs, the demand for unit dose packaging solutions that can handle these complex formulations will increase. This trend is particularly relevant as more patients receive treatments in non-hospital settings, where precise dosing and ease of use are crucial. The growing emphasis on patient-centric care—where treatments are tailored to meet the individual needs of patients—supports the adoption of unit dose packaging. Healthcare providers are increasingly focused on improving medication adherence and reducing the burden on patients, particularly those managing chronic conditions. Unit dose packaging simplifies medication regimens, helping patients take the correct dose at the right time. This trend toward patient empowerment and self-management will continue to drive demand for unit dose solutions that enhance convenience and compliance.

Rising Demand for Home-based Healthcare and Self-administration

Another major trend driving the future growth of the unit dose manufacturing market is the increasing demand for home-based healthcare and self-administration of medications. As healthcare systems face growing pressures to reduce costs and hospitalizations, there is a shift toward delivering care in the home, particularly for chronic disease management and post-hospitalization recovery. The global healthcare landscape is moving towards decentralized care models, where patients receive treatments at home rather than in hospitals or clinics. This shift is driven by the need to reduce healthcare costs, improve patient comfort, and mitigate the risk of hospital-acquired infections. Unit dose packaging is essential in this trend, as it allows for easy, safe, and precise medication administration outside of clinical settings. Medications packaged in unit doses, such as pre-filled syringes, inhalers, or oral dissolvable tablets, are ideal for home-based care because they are easy to use, reduce the risk of dosing errors, and ensure that patients receive the exact dose prescribed. This trend is

particularly important in chronic conditions such as diabetes, hypertension, and respiratory disorders, where long-term treatment regimens often require multiple medications.

Self-administration of medications is becoming more common as patients seek greater autonomy over their treatment. This trend is supported by innovations in drug delivery systems, which make it easier for patients to administer their own medications without medical supervision. Unit dose packaging, with its pre-measured doses, plays a critical role in enabling self-administration, particularly for injectable medications and complex therapies. For example, auto-injectors and pre-filled pens are becoming increasingly popular for conditions such as rheumatoid arthritis and multiple sclerosis, where patients need to regularly administer biologic drugs. The convenience of unit dose packaging reduces the need for frequent healthcare visits and improves adherence, making it a key driver of growth in the market.

The COVID-19 pandemic accelerated the adoption of telemedicine and remote patient monitoring, trends that are expected to persist. As healthcare providers continue to offer remote consultations and manage patients virtually, the need for reliable, easy-to-use unit dose packaging solutions will grow. These solutions ensure that patients can safely manage their medications at home, even for complex therapies that traditionally required in-person administration. The integration of smart packaging technologies, such as RFID tags or QR codes, further enhances the potential of unit dose packaging in remote care. These technologies allow healthcare providers to monitor medication adherence and ensure patients are following their prescribed regimens, even from a distance.

Segmental Insights

Sourcing Insights

Based on the category of Sourcing, the outsourcing segment emerged as the dominant in the global market for Unit Dose Manufacturing in 2023. the primary reasons for the dominance of the outsourcing segment in the global unit dose manufacturing market is the cost efficiency it offers. By outsourcing unit dose manufacturing to specialized CMOs, pharmaceutical companies can significantly reduce operational costs associated with building and maintaining in-house facilities. Establishing in-house unit dose manufacturing requires substantial investments in state-of-the-art machinery, packaging technologies, and cleanroom environments. This capital expenditure is prohibitive for many companies, particularly small- and mid-sized pharmaceutical firms. Outsourcing

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provides an attractive solution by eliminating the need for such heavy investments. CMOs, with their established infrastructure, can handle large-scale production and meet stringent quality standards without the pharmaceutical company incurring significant overhead costs. By outsourcing, companies can redirect capital toward their core competencies—such as drug development, marketing, and distribution—rather than investing in complex manufacturing processes. This is particularly beneficial for firms that prioritize innovation and rapid product development over manufacturing capacity. As a result, outsourcing becomes a strategic choice to remain competitive in a cost-sensitive market. CMOs typically operate at a larger scale than individual pharmaceutical companies, allowing them to achieve economies of scale that result in lower per-unit production costs. Their ability to handle high-volume production across multiple clients enables them to offer competitive pricing for unit dose packaging services. This efficiency is especially valuable for pharmaceutical companies producing large batches of generic drugs or mass-market medications that require cost-effective solutions. Outsourcing allows these companies to benefit from lower production costs without compromising quality or compliance. In turn, this enables pharmaceutical firms to maintain their profit margins in an increasingly competitive global market, where cost pressures are significant.

The growing complexity of drug formulations, particularly in areas such as biologics and specialty medications, requires cutting-edge manufacturing and packaging technologies. Many pharmaceutical companies turn to outsourcing partners for their technological expertise and innovative packaging solutions, making the outsourcing segment a dominant force in the market. Unit dose packaging requires precise, often complex, packaging solutions, such as pre-filled syringes, inhalers, blister packs, and vials. CMOs invest heavily in advanced machinery and technologies to meet these demands, allowing them to provide superior packaging services. Pharmaceutical companies, particularly those focused on new product development, often lack the necessary packaging infrastructure to handle these demands in-house. Outsourcing to CMOs gives companies access to automated filling systems, high-speed blister packaging lines, and smart packaging technologies that ensure accurate, tamper-proof, and traceable unit doses. CMOs often stay ahead of technological trends and implement robotics, vision systems, and serialization capabilities that guarantee compliance with regulatory requirements. Regulatory requirements around unit dose manufacturing are stringent and vary by region. CMOs possess specialized expertise in Good Manufacturing Practices (GMP), serialization, and track-and-trace systems that allow them to meet the evolving regulatory landscape. Their expertise reduces the compliance burden for pharmaceutical companies, ensuring that unit dose products meet the highest safety and quality standards without the pharmaceutical company

having to navigate complex regulations in-house. Many CMOs employ quality control teams and regulatory experts who focus exclusively on ensuring that packaging processes comply with global standards, such as those set by the U.S. Food and Drug Administration (FDA), the European Medicines Agency (EMA), and other regional authorities. For pharmaceutical companies, this expertise is invaluable, as it helps accelerate time to market and reduces the risk of regulatory delays or non-compliance issues. These factors are expected to drive the growth of this segment.

Regional Insights

North America emerged as the dominant in the global Unit Dose Manufacturing market in 2023, holding the largest market share in terms of value. the main reasons North America leads the global unit dose manufacturing market is its well-established pharmaceutical industry, which is among the largest in the world. The United States, in particular, represents a significant share of global pharmaceutical sales and production, providing a strong foundation for the growth of the unit dose packaging segment. The region's high demand for medications—driven by a large and aging population, the increasing prevalence of chronic diseases, and high healthcare spending—fuels the need for efficient and scalable drug manufacturing and packaging solutions, such as unit dose packaging. Unit dose manufacturing plays a crucial role in managing the distribution of these medications, particularly for hospitals, pharmacies, and home healthcare settings, where precise dosing is critical.

North America's advanced healthcare infrastructure, coupled with a high rate of prescription drug use, contributes to consistent demand for unit dose packaging across various therapeutic areas, including oncology, cardiology, and pain management. This demand supports both domestic production and the outsourcing of manufacturing to contract organizations, strengthening the market. Many of the world’s leading pharmaceutical and biotechnology companies, including Pfizer, Johnson & Johnson, and Merck, are headquartered in North America. These companies have extensive R&D pipelines and invest heavily in new drug development, often requiring specialized packaging solutions for personalized or targeted therapies. The need for precise, patient-specific doses has resulted in significant investments in unit dose manufacturing technologies, positioning North America as a leader in this space. Many of these companies rely on contract manufacturing organizations (CMOs) based in North America to handle the packaging and manufacturing of their products. This strong presence of pharmaceutical giants, combined with a robust network of CMOs, gives North America a competitive edge in the global unit dose manufacturing market.

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Key Market Players

Catalent, Inc

Thermo Fisher Scientific Inc.

LTS LOHMANN Therapie-Systeme AG

Mikart LLC

RENAISSANCE LAKEWOOD, LLC

Medical Packaging Inc., LLC

Corden Pharma International GmbH

AmerisourceBergen Corporation

Cencora, Inc

Amcor PLC

By Sourcing By Product By End User By Region

In-house

Outsourcing %li%Liquid Unit Dose

Solid Unit Dose

Others %li%Independent Pharmacies

Long-Term Care Facility

Hospitals

Others %li%North America

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Europe

Asia Pacific

South America

Middle East & Africa

Report Scope:

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

Unit Dose Manufacturing Market, By Sourcing:

In-house

Outsourcing

Unit Dose Manufacturing Market, By Product:

Liquid Unit Dose

Solid Unit Dose

Others

Unit Dose Manufacturing Market, By End User:

Independent Pharmacies

Long-Term Care Facility

Hospitals

Others

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Unit Dose Manufacturing Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

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Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Unit Dose Manufacturing Market.

Available Customizations:

Global Unit Dose Manufacturing 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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