

Pharmaceutical Lipid-Based Excipients Market Size, Share and Growth Outlook 2026: By Excipient Type, By Form, By Application, By Source, Companies to 2034

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Abstracts

The global Pharmaceutical Lipid-Based Excipients Market size is forecast to increase from \$1.78 Billion in 2026 to \$3.48 Billion in 2034 at a CAGR of 8.74% between 2026 and 2034.

The Pharmaceutical Lipid-Based Excipients market report provides detailed analysis and outlook of Pharmaceutical Lipid-Based Excipients segments including By Excipient Type (Triglycerides, Phospholipids, Sphingolipids, Cholesterol, Fatty Acids, Hydrogenated Vegetable Oils, Glycerol Monocaprylocaprate (GMCC), Hard Fats, Sodium Oleate, Others), By Form (Liquid, Semi-solid, Solid), By Application (Oral Formulations, Parenteral, Topical Applications, Ophthalmic Applications, Suppositories), By Source (Synthetic, Semi-synthetic, Natural) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Pharmaceutical Lipid-Based Excipients Industry Overview

Advanced Lipid Technologies and Computational Formulation Tools Are Transforming Pharmaceutical Lipid-Based Excipients

The pharmaceutical lipid-based excipients industry is evolving rapidly as drug developers seek advanced delivery systems that improve bioavailability, controlled drug release, and formulation stability for increasingly complex active pharmaceutical ingredients. Lipid excipients are becoming essential components in oral solid dosage

forms, self-emulsifying drug delivery systems, nanostructured lipid carriers, and targeted drug delivery platforms. At the same time, manufacturers are investing in innovative lipid chemistries, computational formulation technologies, and resilient supply chains to support the growing demand for high-performance pharmaceutical excipients across biologics, peptides, and poorly soluble small-molecule drugs.

Innovation in Functional Lipid Excipients Expands Drug Delivery Capabilities

Manufacturers are introducing specialized lipid excipients that enable more precise pharmaceutical formulation and targeted drug delivery. Evonik received industry recognition at CPHI China for its EUDRACAP® colon-targeting functional capsules, which combine advanced lipid and polymer technologies to deliver sensitive active pharmaceutical ingredients directly to the ileo-colonic region through ready-to-fill capsule systems. Nordmann, together with partner IOI Oleo, expanded formulation options by launching the LipoGalen® portfolio based on polyglycerol ester technology. The non-polymorphic crystalline lipid excipients provide pharmaceutical developers with customizable alternatives to conventional triglycerides for controlled-release matrices and enhanced bioavailability applications. These innovations highlight the industry's continued focus on functional lipid systems capable of improving therapeutic performance across modern drug delivery platforms.

Digital Formulation and Supply Chain Strategies Strengthen Market Development

The industry is increasingly combining digital formulation technologies with supply chain optimization to accelerate pharmaceutical development. Gattefossé partnered with Siemens to deploy the PC-SAFT thermodynamic model through the gPROMS FormulatedProducts platform, enabling computational prediction of active pharmaceutical ingredient solubility within lipid excipients such as Capryol® 90 and Maisine® CC. The approach reduces experimental screening requirements during development of self-emulsifying drug delivery systems and nanostructured lipid carriers, accelerating formulation optimization. Meanwhile, BASF Pharma Solutions implemented a global price adjustment across its pharmaceutical excipient portfolio to maintain reliable supply amid increasing energy and raw material costs, reinforcing continued investment in stable production of lipid excipients critical for drug stability and bioavailability. Together, these developments demonstrate the industry's progression toward high-performance lipid excipients supported by advanced modeling technologies and resilient manufacturing infrastructure.

Pharmaceutical Lipid-Based Excipients Market Trends, Growth Drivers, Competitive

Landscape, and Future Opportunities

The global Pharmaceutical Lipid-Based Excipients market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- BASF SE, Gattefoss?, Croda International plc , Evonik Industries AG, ABITEC Corporation, CordenPharma, Merck KGaA, Lipoid GmbH, NOF Corporation, IOI Oleo GmbH. The Pharmaceutical Lipid-Based Excipients market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Pharmaceutical Lipid-Based Excipients industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Pharmaceutical Lipid-Based Excipients Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Pharmaceutical Lipid-Based Excipients companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Pharmaceutical Lipid-Based Excipients markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and long-term outlook

- Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Pharmaceutical Lipid-Based Excipients Market Competitive Benchmarking and Company Analysis

Leading companies in Pharmaceutical Lipid-Based Excipients industry include- BASF SE, Gattefoss?, Croda International plc, Evonik Industries AG, ABITEC Corporation, CordenPharma, Merck KGaA, Lipoid GmbH, NOF Corporation, IOI Oleo GmbH. The Pharmaceutical Lipid-Based Excipients market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Pharmaceutical Lipid-Based Excipients Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Pharmaceutical Lipid-Based Excipients market remains one of the strongest-performing segments in the country.

The US Pharmaceutical Lipid-Based Excipients Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Pharmaceutical Lipid-Based Excipients market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Pharmaceutical Lipid-Based Excipients industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of

Canadian Pharmaceutical Lipid-Based Excipients markets

Canada's strong Pharmaceutical Lipid-Based Excipients sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Pharmaceutical Lipid-Based Excipients market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Pharmaceutical Lipid-Based Excipients Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Pharmaceutical Lipid-Based Excipients market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Pharmaceutical Lipid-Based Excipients population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Pharmaceutical Lipid-Based Excipients industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Pharmaceutical Lipid-Based Excipients market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Pharmaceutical Lipid-Based Excipients sales through 2034

France Pharmaceutical Lipid-Based Excipients companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Pharmaceutical Lipid-Based Excipients Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Pharmaceutical Lipid-Based Excipients distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Pharmaceutical Lipid-Based Excipients Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Pharmaceutical Lipid-Based Excipients market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Pharmaceutical Lipid-Based Excipients industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more

pronounced in the Chinese Pharmaceutical Lipid-Based Excipients industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Pharmaceutical Lipid-Based Excipients Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Pharmaceutical Lipid-Based Excipients market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Pharmaceutical Lipid-Based Excipients market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Pharmaceutical Lipid-Based Excipients Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria,

and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Pharmaceutical Lipid-Based Excipients Market Segmentation

By Excipient Type

Triglycerides

Phospholipids

Sphingolipids

Cholesterol

Fatty Acids

Hydrogenated Vegetable Oils

Glycerol Monocaprylocaprate (GMCC)

Hard Fats

Sodium Oleate

Others

By Form

Liquid

Semi-solid

Solid

By Application

Oral Formulations

Parenteral

Topical Applications

Ophthalmic Applications

Suppositories

By Source

Synthetic

Semi-synthetic

Natural

Leading Companies in Pharmaceutical Lipid-Based Excipients Industry (2026)

BASF SE

Gattefoss?

Croda International plc

Evonik Industries AG

ABITEC Corporation

CordenPharma

Merck KGaA

Lipoid GmbH

NOF Corporation

IOI Oleo GmbH

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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 - Hard Fats
 - Sodium Oleate
 - Others
- By Form
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Gattefoss?

Croda International plc

Evonik Industries AG

ABITEC Corporation

CordenPharma

Merck KGaA

Lipoid GmbH

NOF Corporation

IOI Oleo GmbH

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