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# Pharmaceuticals: United States

March 2018



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# About This Report

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## Scope & Method

This report forecasts to 2021 US (including Puerto Rico) demand for pharmaceuticals for human use in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- compounded
- biological

Compounded pharmaceutical demand is also segmented by therapeutic class as follows:

- hormones and related
- central nervous system
- anti-infective
- cardiovascular
- respiratory
- nutritional
- digestive and genito-urinary
- dermatological

To illustrate historical trends, total demand, trade, and the various segments are provided in annual series from 2006 to 2016.

To avoid double-counting, uncompounded pharmaceuticals, also referred to as pharmaceutical chemicals or ingredients, are excluded from the scope of this report. Diagnostic, industrial, and veterinary products are also excluded. Re-exports of pharmaceuticals are excluded from demand and trade figures.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

## About This Report

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Pharmaceuticals: United States* (FF40040) represents the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 5 | Industry Codes Related to Pharmaceutical

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
325412	Pharmaceutical Preparation Mfg	2834	Pharmaceutical Preparations
325414	Biological Product (except Diagnostic) Mfg	2836	Biological Products, Except Diagnostic Substances

Source: US Census Bureau

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## Resources

### The Freedonia Group

#### Freedonia Industry Studies

*Global Pharmaceutical Packaging*, January 2018  
*Elder Care Services Market in the US*, November 2017  
*Medical Implants in the US*, November 2016

#### Freedonia Focus Reports

*Deathcare: United States*  
*Global Contract Biopharmaceuticals*  
*Healthcare: United States*  
*Healthcare Insurance: United States*  
*World Needle-Free Drug Delivery Systems*

#### Freedonia Custom Research

### Kalorama Information

*Biopharmaceutical Contract Manufacturing Market*, November 2017  
*Potential Pipeline Disruptors*, May 2017

### Trade Publications

*Biomedical Market Newsletter*  
*Drug Discovery & Development*  
*Drug Topics*  
*Genetic Engineering & Biotechnology News*  
*Pharmaceutical Technology*  
*US Pharmacist*

### Agencies & Associations

American Association of Pharmaceutical Scientists  
American College of Cardiology  
American Heart Association  
Generic Pharmaceutical Association  
National Institutes of Health  
Pharmaceutical Industry Association of Puerto Rico  
Pharmaceutical Research and Manufacturers of America  
The United States Pharmacopeial Convention  
United States Census Bureau  
United States Centers for Disease Control and Prevention  
United States Food and Drug Administration

## About This Report

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