

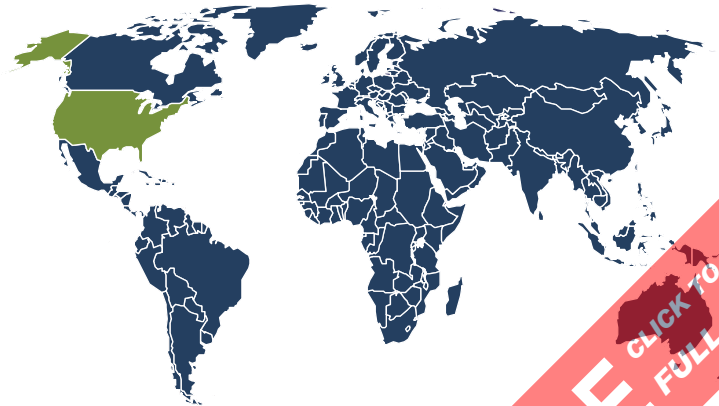


Freedonia Focus Reports  
US Collection

# Excipients:

## United States

March 2014



### Highlights

#### Industry Overview

Market Size and Trends | Product Segmentation | Application Segmentation  
Pharmaceutical Dosage Formulations | Regulatory Overview

#### Demand Forecasts

Market Environment | Product Forecasts | Application Forecasts

#### Industry Structure

Industry Composition and Characteristics | Additional Companies Cited

#### Resources

[www.freedoniafocus.com](http://www.freedoniafocus.com)

CLICK TO ORDER  
FULL REPORT  
BROCHURE  
CLICK TO ORDER  
FULL REPORT

## ABOUT THIS REPORT

### Scope & Method

This report forecasts US excipient demand in pounds and US dollars at the manufacturers' level to 2018. Total demand in dollars is segmented by product in terms of:

- polymers
- alcohols
- minerals
- gelatin
- other products such as sugars, dyes and pigments, and flavors.

Total demand in dollars is also segmented by application as follows:

- fillers and diluents
- binders
- suspension and viscosity agents
- coatings
- solvents
- other applications such as flavoring agents, capsules, and disintegrants.

To illustrate historical trends, total demand in dollars is provided in an annual series from 2003 to 2013; the various segments are reported at five-year intervals for 2008 and 2013. Forecasts are developed via the identification and analysis of pertinent statistical relationships and other historical trends/events as well as their expected progression/impact over the forecast period. Changes in quantities between reported years of a given total or segment are typically provided in terms of five-year compound annual growth rates (CAGRs). For the sake of brevity, forecasts are generally stated in smoothed CAGR-based descriptions to the forecast year, such as "demand is projected to rise 3.2% annually through 2018." The result of any particular year over that period, however, may exhibit volatility and depart from a smoothed, long-term trend, as historical data typically illustrate.

Key macroeconomic indicators are also provided at five-year intervals with CAGRs for the years corresponding to other reported figures. 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

*Excipients: United States* is based on [Excipients](#), a comprehensive industry study

published by The Freedonia Group in March 2014. Reported findings represent 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
- The Freedonia Group Consensus Forecasts dated December 2013
- the findings of other industry 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

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
325411	Medicinal and Botanical Manufacturing	2833	Medicinal Chemicals and Botanical Products
325412	Pharmaceutical Preparation Manufacturing	2834	Pharmaceutical Preparations
325998	All Other Miscellaneous Chemical Product and Preparation Manufacturing	2835	In Vitro and In Vivo Diagnostic Substances
		2899	Chemicals and Chemical Preparations, NEC

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group, Inc.

# Table of Contents

Section	Page
About This Report .....	i
Highlights .....	1
Industry Overview .....	2
Market Size & Trends .....	2
Chart 1   United States: Excipient Demand Trends, 2003-2013 .....	2
Product Segmentation .....	3
Chart 2   United States: Excipient Demand by Product, 2013 .....	3
Polymers .....	4
Alcohols .....	5
Minerals .....	6
Gelatin .....	6
Other Excipients .....	6
Application Segmentation .....	8
Chart 3   United States: Excipient Demand by Application, 2013 .....	8
Fillers & Diluents .....	8
Binders .....	9
Suspension & Viscosity Agents .....	9
Coatings .....	10
Solvents .....	10
Other Applications .....	11
Pharmaceutical Dosage Formulations .....	13
Chart 4   United States: Pharmaceutical Shipments by Dosage Formulation, 2013 .....	13
Regulatory Overview .....	14
Demand Forecasts .....	16
Market Environment .....	16
Table 1   United States: Key Indicators for Excipient Demand; 2008, 2012, 2018 (US\$ bil) .....	16
Product Forecasts .....	17
Table 2   United States: Excipient Demand by Product; 2008, 2013, 2018 (US\$ mil) .....	17
Polymers .....	18
Alcohols .....	18
Minerals .....	18
Gelatin .....	19
Other Excipients .....	19
Application Forecasts .....	20
Table 3   United States: Excipient Demand by Application; 2008, 2013, 2018 (US\$ mil) .....	20
Fillers & Diluents .....	20
Binders .....	20
Suspension & Viscosity Agents .....	21
Coatings .....	21
Solvents .....	21
Other Applications .....	22
Industry Structure .....	23
Industry Composition & Characteristics .....	23
Company Profile 1   The Dow Chemical Company .....	24
Company Profile 2   Ashland Incorporated .....	25
Company Profile 3   FMC Corporation .....	26
Additional Companies Cited .....	27
Resources .....	28

To return here, click on any Freedonia logo or the Table of Contents link in report footers.  
 PDF bookmarks are also available for navigation.