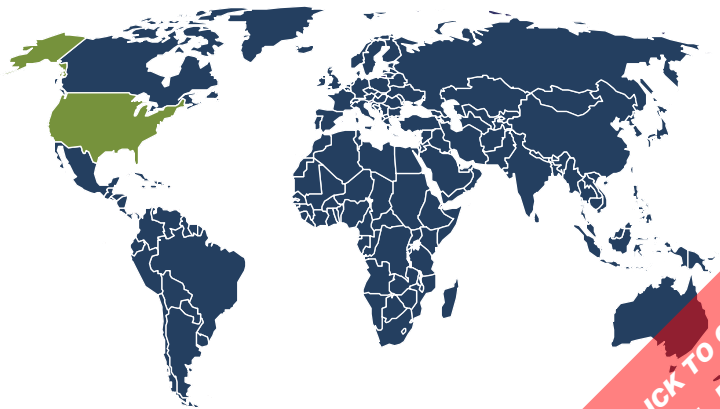


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# Pharmaceutical Chemicals: United States

June 2015



## Highlights

### Market Environment

Historical Market Size and Trends | Key Economic Indicators | Merchant Market Trade  
Merchant Market Global Overview | Regulatory Environment

### Segmentation and Forecasts

Therapeutic Groups | Sources of Supply

### Industry Structure

Industry Composition and Characteristics | Additional Companies Cited

### Resources

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## ABOUT THIS REPORT

### Scope & Method

This report forecasts US pharmaceutical chemical demand in US dollars at the manufacturers' level to 2019. Total demand is segmented by therapeutic group in terms of:

- central nervous system (CNS)
- hormones and related
- cardiovascular
- anti-infective
- nutritional
- biological
- respiratory
- other therapeutic groups such as gastrointestinal and dermatological.

Pharmaceutical excipients, intermediates, and processing chemicals are not included in the analysis nor reflected in the demand and market share figures appearing in this report.

Total demand is also segmented by source of supply as follows:

- captive/contract production
- merchant market.

To illustrate historical trends, total demand is provided in an annual series from 2004 to 2014; the various segments are reported at five-year intervals for 2009 and 2014.

This report quantifies trends in various measures of growth. 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. 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.

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

*Pharmaceutical Chemicals: United States* (FF40059) is based on [Pharmaceutical Chemicals](#), a comprehensive industry study published by The Freedonia Group in June 2015. 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
- indicator forecasts by The Freedonia Group
- 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 Mfg	2833	Medicinal Chemicals and Botanical Products
325412	Pharmaceutical Preparation Mfg	2834	Pharmaceutical Preparations
325413	In-Vitro Diagnostic Substance Mfg	2835	In Vitro and In Vivo Diagnostic Substances
325414	Biological Product (except Diagnostic) Mfg	2836	Biological Products, Except Diagnostic Substances
424210	Drugs and Druggists' Sundries	5122	Drugs, Drug Proprietaries, and Druggists' Sundries

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