



Freedonia Focus Reports
Global Collection

Global Contract Biopharmaceuticals

November 2017



CLICK TO ORDER
FULL REPORT **BROCHURE** CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Global Overview & Forecasts	4
Revenues by Service	4
3. Regional Segmentation & Forecasts	8
Regional Overview	8
US	10
Western Europe	12
China	15
India	17
Other Regions	19
Other Asia	20
Eastern Europe	20
Latin America	22
Rest of World	23
4. Industry Structure	24
Industry Characteristics	24
Market Share	24
Patheon	25
Lonza	25
Catalent	26
5. About This Report	27
Scope & Method	27
Sources	27
Industry Codes	29
Resources	30

List of Tables & Figures

Figure 1 Global BCMO Market Outlook, 2017 – 2022	3
Figure 2 Global BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	4
Table 1 Global BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	4
Figure 3 Global BCMO Revenues by Service, 2012 – 2022 (%)	7
Figure 4 Global BCMO Revenues by Region, 2012 – 2022 (US\$ bil)	8
Table 2 Global BCMO Revenues by Region, 2012 – 2022 (US\$ bil)	8
Figure 5 Global BCMO Revenues by Region, 2012 – 2022 (%)	9
Figure 6 US: BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	10
Table 3 US: BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	11
Figure 7 Western Europe: BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	12
Table 4 Western Europe: BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	14
Figure 8 China: BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	15
Table 5 China: BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	16
Figure 9 India: BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	17
Table 6 India: BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	18
Figure 10 Other Regions: BCMO Revenues by Region, 2012 – 2022 (US\$ bil)	19
Figure 11 Other Regions: BCMO Revenues by Service, 2012 – 2022 (US\$ bil)	19
Table 7 Other Regions: BCMO Revenues by Region & Service, 2012 – 2022 (US\$ bil)	23
Figure 12 Global BCMO Market Share by Company, 2017 (%)	24
Table 8 Leading Suppliers to the Global BCMO Market	25
Table 9 Industry Codes Related to Biopharmaceutical Contract Manufacturing	29

About This Report

Scope & Method

This report forecasts global revenues for 2018-2022 for the biopharmaceutical contract manufacturing organization (BCMO) sector by service and major world region in nominal US dollars. Service segments include:

- commercial manufacturing
- contract manufacturing

Major world regions include US, Western Europe, China, India, and all other regions. To illustrate historical trends, world, service, and regional demand are provided in annual series for 2012-2017.

Excluded from this report are fees related to contract manufacturing of:

- non-prescription (OTC) medications
- nutritional and herbal supplements
- cosmetic and personal care preparations
- agricultural and other chemicals

This report quantifies trends in terms of compound annual growth rates (CAGRs), which, by definition, employ in their calculation only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the trend beginning in the base year and ending in the forecast year. Forecasts are developed via the identification and analysis of pertinent statistical relationships and other historical trends and events, as well as their expected impact over the forecast period. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Unless otherwise indicated, both historical and forecasted market values are expressed in US dollars at a fixed 2016 rate of exchange with local currencies. 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

Global Contract Biopharmaceuticals (FW40078) is based on *Biopharmaceutical Contract Manufacturing Market* published by Kalorama Information. Historical information for this report was gathered from a wide variety of published sources, including company reports, filings, websites, and presentations; government documents; legal filings; trade journals; newspapers and business press; analysts' reports; and other sources. Interviews with company representatives were conducted to capture the perspectives from industry

About This Report

participants' point of view and assess trends, and form the basis of the forecasting and competitive analysis.

Best efforts were made to determine BCMO fees by region in the many instances where these are not specifically reported by each company. Contract manufacturing fees were allocated to the country/region of production, not to the region of export; therefore, companies with production facilities in a single country, such as China, were deemed to be regional Chinese players even if they have extensive export operations to many other countries. These determinations were made on the basis of currently available information. Where reliable information was not attainable, no estimate was attempted.

It should also be noted that many other sources attempt to quantify the contract manufacturing industry and may use different methodologies that include, for example, contract research and development fees. Due to the bottom-up methodology utilized in this report, estimates may conflict with those in other market research reports. While an attempt was made to reconcile this data with other analysts, where opinions differed, information obtained directly from each manufacturer, via primary or secondary sources, was given precedence.

While some regions, such as India, have developed local acronyms for contract work (i.e., CRAMS to represent custom research and manufacturing services), this report will utilize consistent, globally-accepted acronyms throughout all regions. This includes CRO (contract research organization), BCMO (biopharmaceutical contract manufacturing organization), and CDMO (contract research and development organization).

Increasingly, CROs have been adding BCMO capabilities to create full service CDMOs. In this report, all BCMO estimates pertain primarily to contract manufacturing and do not include contract research services. In some discussions of BCMO forecasts, CRO estimates are included to provide context and comparison; however, these are separate from BCMO revenues.

Additionally, organizations whose mission is mainly to provide contract research services – such as QuintilesIMS, Covance, Charles River Labs, etc. – are excluded from manufacturer profiles and discussions. While these companies often offer some contract manufacture of small batches of product for clinical testing, they are generally not active in commercial production; however, their revenue contributions are included in industry estimates among “other” players.

It also should be noted that the market forecasts in this report represent a “most likely” scenario and may prove either overly conservative or overly aggressive depending upon various occurrences including, but not limited to: softening economy in the US; softening economy in Europe, particularly in response to deepening debt problems; weaker capital market that would inhibit corporate fundraising; further tightening of regulatory scrutiny in the US, Europe, and/or other regions; and the introduction of new production

About This Report

technologies. These are just a few of the many factors that could affect the estimates in this report.

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

Industry Codes

Table 9 | Industry Codes Related to Biopharmaceutical Contract Manufacturing

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

Source: US Census Bureau

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.

Resources

Kalorama Information

Biopharmaceutical Contract Manufacturing Market, November 2017

The Freedonia Group

Freedonia Industry Studies

Pharmaceutical Packaging Market in the US, June 2017

Medical Implants in the US, November 2016

World Medical Disposables, August 2016

In Vitro Diagnostic (IVD) Packaging, June 2016

Infection Prevention Products & Services, April 2016

Medical & Dental Adhesives & Sealants, March 2016

Disposable Medical Supplies, February 2016

Dental Products & Materials, January 2016

Freedonia Focus Reports

Drug Delivery Products: United States

Global PCR Testing Products & Services

Global Telehealth Products & Services

Healthcare Insurance: United States

Healthcare: United States

Healthcare VR/AR Systems: United States

Medical Equipment & Supplies: United States

Medical Imaging Products: United States

Medical Services: United States

Pharmaceutical Packaging: United States

Pharmaceuticals: United States

World Cell-Free DNA

World Medical Devices

World Medical Disposables

World Needle-Free Drug Delivery Systems

World Personalized Medicine Tests for Cancer

Freedonia Custom Research

Trade Publications

Drug Discovery & Development

Drug Topics

Genetic Engineering & Biotechnology News

Hospitals & Health Networks

About This Report

IHS Chemical Week

Medical Design Technology

Medical Device & Diagnostic Industry

Modern Healthcare

Provider

Agencies & Associations

American Association of Pharmaceutical Scientists

American Hospital Association

American Medical Association

Centers for Disease Control and Prevention

National Institutes of Health

Pharmaceutical Research and Manufacturers of America

United States Census Bureau

United States Food and Drug Administration

World Health Organization