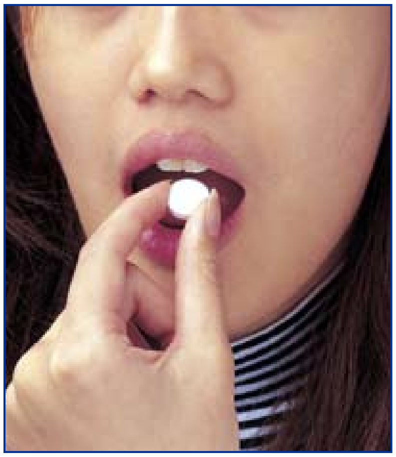
INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS



Drug Delivery Systems

US Industry Study with Forecasts for **2012 & 2017**

Study #2294 | March 2008 | $4500 | 338 pages

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Drug Delivery Systems

US Industry Study with Forecasts for ***2012 & 2017***

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Drug Delivery Systems

US Industry Study with Forecasts for ***2012 & 2017***

Growth opportunities in the US market for drug delivery systems will extend to a wide range of compounds and formulations in the oral, parenteral, inhalation and other product segments.

US demand to grow over 10% yearly through 2012

US demand for drug delivery systems (including the value of the delivered drugs) will increase over ten percent annually to $132 billion in 2012. Oral drug delivery systems will continue to account for the largest share of demand through 2012 due to favorable cost advantages, a wealth of potential new product applications and significant efficacy advantages over conventional dosage formulations. Medicines adapted to controlled-release matrix, diffusion and reservoir systems will post favorable sales gains as drug makers seek to gain competitive advantages by introducing new, improved formulations of off-patent pharmaceuticals. Spurred by ingestion and onset-of-action benefits, orally disintegrating tablets and transmucosal drugs will generate strong growth opportunities in the delivery of pain control and other critical care medication. Ease of administration advantages will promote the widening use of chewable tablet dosages for nutritional, respiratory and central nervous system agents, especially pediatric preparations. Improved solubility and pharmacokinetic actions will lead to rapid growth both in the number and sales of oral nanoparticle drugs.

US Drug Delivery System Demand

($80.2 billion, 2007)

Parenteral doses to be fastest growing product

Among all pharmaceutical dosage formulations, parenteral preparations will provide the strongest growth opportunities for drug delivery systems, with demand expanding over 15 percent annually through 2012. Precise targeting advantages in the treatment of cancer and other debilitating diseases will broaden demand for therapeutic monoclonal antibodies. Extended circulation and reduced toxicity benefits will expand the range of indications served by polymer- and liposome-encapsulated drugs, especially in the areas of cancer, neurological and anti-infective therapies. Ease of administration and infection prevention advantages will boost the market for parenteral drugs and solutions sold in prefilled syringes and premixed IV systems.

An increasing incidence of chronic respiratory conditions will keep demand for inhalation drug delivery systems advancing favorably. Based on widespread use in asthma therapy, dry powder inhaler formulations will continue to record the largest share of sales. However, metered dose drugs will see slightly faster gains in demand due to ongoing improvements in particle size and propellent safety. Led by new drug-eluting stents with thinner struts and enhanced safety profiles, implantable drug delivery systems will recapture rapid growth opportunities in cardiovascular medication. Lastly, advances in electrotransport technologies will broaden applications for transdermal patches.

Drug Delivery Systems

US Industry Study with Forecasts for ***2012 & 2017***

Sample Text, Table & Chart

TABLE VII-2

INHALATION DRUG DELIVERY SYSTEM DEMAND BY TYPE & THERAPEUTIC CLASS (million dollars)

Item	1997	2002	2007	2012	2017
Inhalation Pharm Demand (bil $)					
$ drug delivery systems/000$ pharm					
Inhalation Drug Delivery Systems					
By Type:					
Dry Powder					
Metered Dose Liquid					
By Therapeutic Class:					
Respiratory Agents					
Central Nervous System Agents					
Hormones & Related Agents					
% inhalation					
Other Drug Delivery System Demand					

SAMPLE TABLE

ORAL DRUG DELIVERY SYSTEMS

Orally Disintegrating Tablets

Orally disintegrating tablets (ODTs) are evolving into a delivery system for drugs that treat medical conditions vulne sudden onset of symptoms. ... llergie migraine headaches and sch... sed medicines prescribed to elde... have swallowing conventional do... n exp indications, demand for OD... to inc percent annually to nearly $

SAMPLE TEXT

ODTs are formulated to dissolve rapidly -- usually in a seconds -- in the oral cavity after placement on the tongue. they are taken orally without water, most drugs based on this incorporate excipients that mask unpleasant tastes. ODTs can be produced as compression molded tablets or lyophilized wafers. Although more expensive to manufacture than conventional dosage formulations, medicines adapted to ODT delivery systems are expected to expand significantly in number over the next decade and beyond. Pharmaceutical companies are employing these systems to introduce product line extensions eligible for patent protection and differentiable from generic versions of conventional formulations. ABILIFY (aripiprazole), RISPERDAL (risperidone) and ZYPREXA (olanzapine) for schizophrenia; ALLEGRA (fexofenadine HCl) for allergies; ARICEPT (donepezil HCl) for Alzheimer's disease; MAXALT (rizatriptan benzoate) and ZOMIG-ZMT (zolmitriptan) for migraine headaches; and ZOFRAN (ondanestron HCl) for chemotherapy-induced nausea and vomiting are among the widely prescribed drugs available in ODT dosages.

Among the available ODT technologies are Catalent Pharma Solutions' ZYDIS, CIMA LABS' DURASOLV and ORASOLV, Eurand's ADVATAB, and SPI Pharma's PHARMAFREEZE systems. Catalent's ZYDIS technology employs a proprietary freeze-drying process in which

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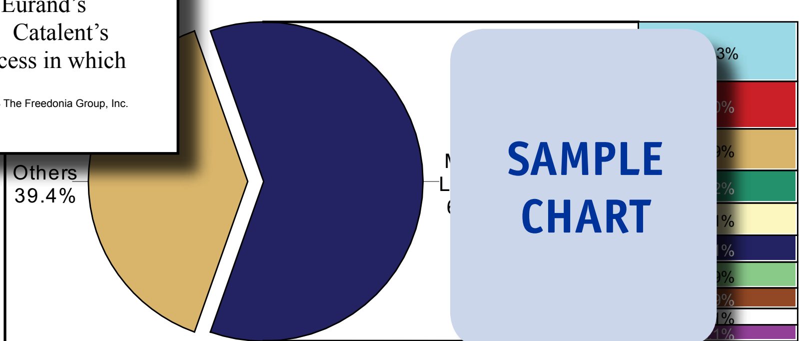
CHART IX-1

DELIVERY PRODUCT SALES BY COMPANY, 2007* ($80.2 billion)



SAMPLE CHART

* sales of drugs adapted to drug delivery formulations such as controlled-release & monoclonal antibodies, as well as drugs delivered through specialized devices such as inhalers & prefilled syringes

Drug Delivery Systems

US Industry Study with Forecasts for ***2012 & 2017***

Sample Profile, Table & Forecast

TABLE VIII-4

HORMONE & RELATED DRUG DELIVERY DEMAND BY TYPE
(million dollars)

Item	1997	2002	2007	2012	2017
Hormone & Related Demand (bil $)					
$ DDS/000$ hormones & related					
Hormone & Related DDS Demand					
Oral Drug Delivery Systems:					
Controlled-Release					
Other Oral					
Parenteral Drug Delivery Systems:					
Monoclonal Antibodies					
Prefilled Syringes					
Encapsulated Systems					
Premixed IV Solutions					
Other Drug Delivery Systems:					
Inhalation					
Transdermal					
Implantable					
% hormones & related agents					
Drug Delivery Applications (bil $)					

SAMPLE TABLE

COMPANY PROFILES

Corium International Incorporated
235 Constitution Drive
Menlo Park, CA 94025
650-298-8255
http://www.cor

Annual Sales:
Employment:

Key Technolog ... nsdermal drug
delivery techno ... logy

SAMPLE PROFILE

Corium International is a privately held company involved in the research, development and manufacture of transdermal drug delivery technologies, products and devices. The Company's technologies can be used to produce prescription transdermal drug delivery systems, over-the-counter medical treatments, wound care products, and medical devices and diagnostics.

Corium is active in the drug delivery systems industry through the development and application of the Company's proprietary CORPLEX polymer and MICROCOR mechanical microporation technologies. These systems are designed to deliver drugs across the skin and mucosa in a variety of rapid and sustained drug release profiles. Among other applications, Corium's drug delivery technologies have been used to create transdermal systems for applications such as hormone replacement, birth control, smoking cessation and motion sickness.

The Company's broad-based CORPLEX polymer platform technology can be delivered in liquid, semi-solid and solid formats for various transdermal and mucosal drug delivery applications. The CORPLEX hydrogel system consists of a composite blend of polymers

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"Led by cancer indications, demand for hormones and related agents adapted to drug delivery systems will increase over 16 percent annually to nearly $26 billion in 2012. Gains will largely reflect advances in site-specific dosage formulations based on monoclonal antibodies and, to a lesser extent, nanoparticles. Based on direct tumor-attacking actions and improved side effect profiles, monoclonal antibodies are emerging as the leading therapies for the treatment of advanced cancers."
--Section VIII, pg. 196

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Other Studies

Excipients

US excipients demand will grow 4.5% yearly through 2011. Gelatin will remain the leading compound over the intermediate term, but cellulose derivatives will eventually become the top-selling group. Other excipients expected to fare well include calcium phosphate, povidone, pregelatinized starch, petrolatum, polysorbate and natural gums. This study analyzes the $2.3 billion excipients industry, with forecasts for 2011 and 2016 by product and application. It also evaluates market share and profiles leading players.

#2280 .... 01/2008..................... $4500

Implantable Medical Devices

US medical implant demand will rise 9.3% yearly through 2011. Cardiac implants will remain the top-selling group, led by stents and defibrillators. Bone cement, tissue and spinal implants will pace gains in the orthopedic segment. Other fast-growing types include neurological stimulators, cochlear devices and gastric bands. This study analyzes the $27.9 billion US medical implant industry, with forecasts for 2011 and 2016 by material and product. It also evaluates market share and profiles major players.

#2255 .... 10/2007..................... $4500

Disposable Medical Supplies

US demand for disposable medical supplies will grow 4.9% annually through 2011. Best prospects include dry powder inhalers, prefilled syringes and transdermal patches for drug delivery; blood glucose test strips for diabetes monitoring; tissue sealants for wound closure; and daily contact lenses. This study analyzes the US disposable medical supply industry, with forecasts for 2011 and 2016 presented by product, market and raw material. It also evaluates company market share and profiles industry competitors.

#2196 .... 05/2007..................... $4500

In Vitro Diagnostics

US demand for in vitro diagnostic (IVD) products will grow 5.1% annually through 2011. Clinical chemistry and immunoassay methods will remain the top two IVD sciences, while nucleic acid testing products will continue to generate the fastest gains. Hospital labs will stay the largest market while home health care will grow the fastest. This study analyzes the $15.2 billion US IVD industry to 2011 and 2016 by product, application and market. It also evaluates company market share and profiles major players.

#2175 .... 04/2007..................... $4500

Nanotechnology in Health Care

US demand for nanotechnology medical products will grow 17.5% annually through 2011, driven by the critical need for new or improved therapies and diagnostics. The greatest short-term impact will be in cancer and central nervous system disorders, followed by orthopedic nanoimplants. This study analyzes the $23.6 billion US nanotech medical product industry to 2011, 2016 and 2021 by material, product and application. The study also reviews product development activities and profiles major players.

#2168 .... 02/2007..................... $4500

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