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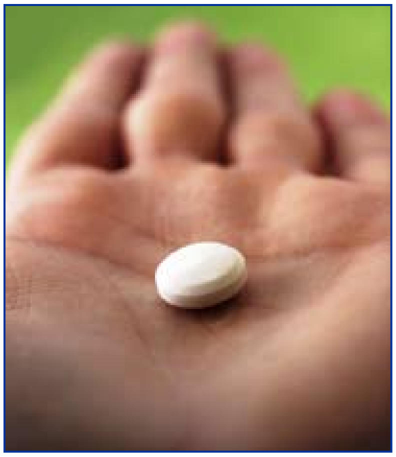

Drug Delivery Products

US Industry Study with Forecasts for **2015 & 2020**

Study #2829 | January 2012 | $4800 | 337 pages

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Drug Delivery Products

US Industry Study with Forecasts for ***2015 & 2020***

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INDUSTRY STRUCTURE

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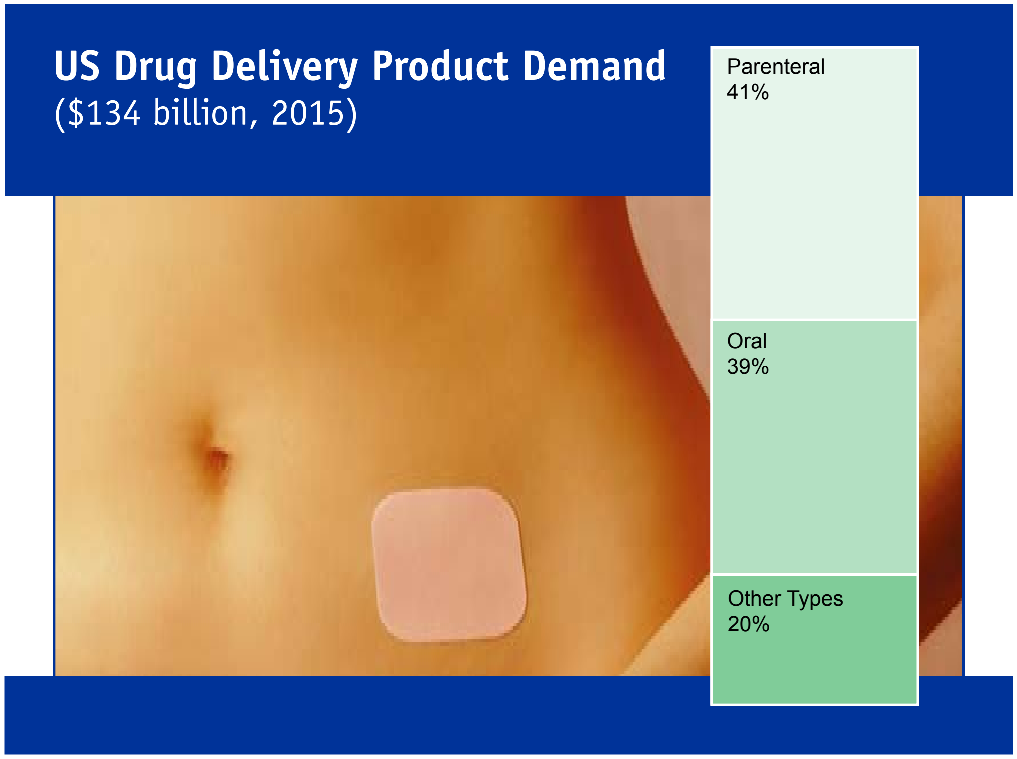
The best growth opportunities will emerge in dosage formulations that improve therapy for autoimmune conditions, cancer, heart disease, neurological disorders and other debilitating illnesses.

US demand to rise 7.4% annually through 2015

US demand for drug delivery products will expand 7.4 percent annually to $134 billion in 2015. The best growth opportunities will emerge in dosage formulations that advance the nature of therapy for autoimmune conditions, cancer, heart disease, neurological disorders and other debilitating health problems. Drug delivery devices with improved safety, infection prevention and ease-of-use features will also fare well in the marketplace. Based on the complex nature of therapy and the high frequency of dosing requirements, central nervous system and hormonal and related conditions will be the fastest growing indications served by drug delivery products.



US Drug Delivery Product Demand
($134 billion, 2015)

Parenteral drug delivery products to grow fastest

Demand for oral drug delivery products will increase 4.3 percent annually to over $52 billion in 2015. Controlled-release formulations will command the largest share of sales, but will lose some growth momentum due to patent expirations on several large-selling sustained-release therapies. Nanoparticulate medicines will record some of the fastest growth among oral drug delivery products based on new products and the high value-added nature of indications served.

Demand for parenteral drug delivery products will reach $54.7 billion in 2015, up nearly eleven percent annually from 2010. Monoclonal antibodies will lead gains as advances in biotechnology lead to the introduction of new and improved therapies for autoimmune disorders, cancer and various rare debilitating diseases. Polymer-encapsulated medicines will also record fast rising demand based on contributions to the improved bioavailability and reduced toxicity of advanced parenteral compounds. Safety-engineered prefillable syringes and IV catheters, along with bag/vial infusion systems, will post the best growth among parenteral delivery devices based largely on infection prevention advantages.

Demand for other drug delivery products will rise 7.4 percent annually to $27.1 billion in 2010. Prefilled dry powder and metered dose inhalers will retain the largest share of sales, spurred by upward trends in prevalence of asthma and chronic obstructive pulmonary disease (COPD). However, growth for these devices will decelerate as patent expirations open up several widely prescribed inhalation therapies, including sales leader ADVAIR (GlaxoSmithKline), to generic competition. Demand for implantable drug delivery products will increase nearly eleven percent annually through 2015 led by new brachytherapy offerings for cancer and macular degeneration. Additionally, the US market for drug-eluting stents will rebound from a recent downturn as next-generation devices with thinner struts and improved safety profiles promote expansion in the volume of angioplasty procedures.

Drug Delivery Products

US Industry Study with Forecasts for ***2015 & 2020***

Sample Text, Table & Chart

TABLE VI-4

ENCAPSULATED PARENTERAL PRODUCT DEMAND BY TYPE & APPLICATION (million dollars)

Item	2000	2005	2010	2015	2020
Chronic Conditions (million)					
$ encapsulated products/condition0.8					
Encapsulated Parenteral Product Dmnd					
By Type:					
Polymer-Protected Products					
Liposomes					
By Application:					
Hormones & Related Agents					
Central Nervous System Agents					
Anti-Infective Agents					
Other Classes					
% encapsulated products					
Parenteral Drug Delivery Prod Dmnd	6410	18320	32600	54700	84600

SAMPLE TABLE

PARENTERAL DRUG DELIVERY PRODUCTS

Prefillable Syringes

Prefillable syringes are projected to post demand of nea billion in 2015, up 2010. Increasi tions in the delive y and patient-a parenteral medica vances in biote and other life scie ange of potenti adaptable to prefil

SAMPLE TEXT

Prefillable syr principal produ Prefilled cartridges adaptable to reusable pen-type injectors v to account for the larger unit consumption based on applicati packaging of insulin and other medicines indicated for self-a tration. However, disposable injectors will record the larger demand value due to their complexity of design and use in th of more sophisticated medicines.

Injectors -- Disposable injectors provide a unit dose, ready-to-use parenteral drug delivery device. The format enables medical professionals to offer drug therapy quickly in life-threatening and other emergency situations. Other major benefits involve the elimination of cross-contamination risks associated with standard hypodermic administration.

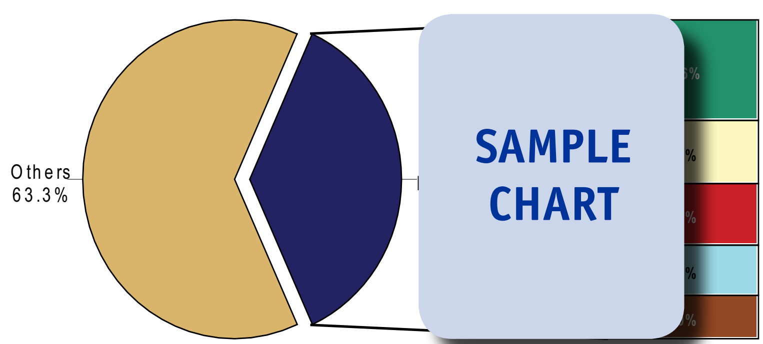
The design of standard prefilled syringe injectors incorporates a cylinder-shaped glass cartridge containing the parenteral solution in liquid form. A rubber plunger connected to a movable plastic component is affixed to one end of the cartridge with a hypodermic needle c protective plastic or rubber shield attached to the opposite en types of standard prefilled syringe injectors vary in capacity 50 milliliters.

Variations of the basic prefilled syringe injector design dual compartment device for the administration of powder fo

155 Copyright 2012

CHART IX-1

DRUG DELIVERY DOSAGE FORMULATIONS, US MARKET SHARE ($85.1 billion, 2010)



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Sample Profile, Table & Forecast

TABLE V-1

ORAL DRUG DELIVERY PRODUCT DEMAND BY TYPE
(million dollars)

Item	2000	2005	2010	2015	2020
Oral Pharmaceutical Demand (bil $)					0
$ drug delivery products/000$ phar					1
Oral Drug Delivery Product Demand					0
Controlled-Release					0
Chewable					0
Nanoparticulate					0
Orally Disintegrating					0
Transmucosal					0
% oral					1
Drug Delivery Product Demand					000

SAMPLE TABLE

COMPANY PROFILES

Aptalis Pharma Incorporated
597 Laurier Boulevard
Mont-Saint-Hilaire, Quebec J3H 6C4
Canada
450-467-5138
http://www.apt

Annual Sales:
Employment:

SAMPLE PROFILE

Key Technolog ... chnologies,
dosage formul ... ug delivery
platforms; and p ... livery systems

Aptalis Pharma, which changed its name from Axcan Intermediate Holdings Incorporated in May 2011, is a leading international specialty pharmaceutical company that develops, manufactures, markets and distributes cystic fibrosis and gastroenterology products and therapeutic treatments. The Company is privately held.

Aptalis Pharma entered the US drug delivery product industry in February 2011 when the Company, which operated as Axcan Intermediate Holdings at the time, purchased specialty pharmaceutical company Eurand NV (Netherlands). Eurand is involved in the development and licensing of proprietary drug formulation technologies in the areas of customized release platforms, dosage formulations and bioavailability enhancement. Specific technologies include DIFFUCAPS, DIFFUTAB, ORBEXA, ADVATAB, BIORISE, MICROCAPS, LIQUITARD and EURAND MINITABS. In addition, the company engages in the manufacture and commercialization of pharmaceutical and biopharmaceutical products based on these technologies. Following the transaction, Eurand's activities related to customized drug release technologies and

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"Demand for oral controlled-release medication adapted to reservoir technology is projected to increase 3.2 percent annually to $2.0 billion in 2015. Gains will reflect advantages of stable zero order drug release and long duration of action. The range of applications and extent of growth opportunities for reservoir drug delivery platforms will be limited by complex formulating requirements and high manufacturing costs. These disadvantages will ..."
--Section V, pg. 91

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Other Studies

World Home Medical Equipment

World demand for home medical equipment will rise 7.0 percent yearly to $28 billion in 2016. The US will remain the largest market while Brazil, China, India, and Russia will be among the fastest growing. Portable oxygen concentrators, remote patient monitors and home dialysis machines will offer some of the best opportunities. This study analyzes the $20 billion world home medical equipment industry, with forecasts for 2016 and 2021 by product, world region and for 15 major countries. The study also evaluates company market share and profiles industry players.

#2964 ....January 2013 .... $6300

In Vitro Diagnostics

US demand for *in vitro* diagnostic (IVD) products will rise 6.1 percent annually to $24.7 billion in 2016. Molecular diagnostic products will grow the fastest due to their advantages in the detection of infectious diseases, tumors and genetic disorders. Hospital labs will continue to comprise the largest and most diverse market. This study analyzes the $18.4 billion US IVD products industry, with forecasts for 2016 and 2021 by type, application and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2923 .... July 2012.................... $5100

Disposable Medical Supplies

US disposable medical supplies demand will rise 4.3 percent yearly to $46.7 billion in 2016. Syringes and inhalers, IV and urinary catheters, hemodialysis bloodlines, peritoneal dialysis kits, tissue sealants, biological wound dressings, Class IV garments and textiles, and blood glucose test strips will be among the fastest growing products. This study analyzes the $37.8 billion US disposable medical supplies industry, with forecasts for 2016 and 2021 by product, market and material. The study also evaluates company market shares and profiles industry players.

#2853 .... March 2012................... $5100

Implantable Medical Devices

US demand for implantable medical devices is forecast to increase 7.7 percent annually to $52 billion in 2015. Orthopedic implants will remain the largest segment and be one of the fastest growing. Pacing devices will lead gains among cardiovascular implants. Other implants expected to do well include neurostimulators and drug implants. This study analyzes the $36 billion US implantable medical device industry, with forecasts for 2015 and 2020 by implant procedure, material and type. The study also evaluates company market share and profiles industry players.

#2852 .... March 2012................... $5100

World Nutraceutical Ingredients

World demand for nutraceutical ingredients will rise 7.2 percent annually to $23.7 billion in 2015. Developing regions will achieve much faster growth in both consumption and production than developed regions. Naturally derived herbal and botanical extracts and marine-based derivatives will command the fastest growth. This study analyzes the $16.8 billion world nutraceutical ingredient industry, with forecasts for 2015 and 2020 by product, world region and for 43 countries. The study also evaluates company market share and profiles industry players.

#2799 .... November 2011 .... $6100

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