Pharmaceutical Chemicals

US Industry Study with Forecasts for 2019 & 2024

Study #3280 | June 2015 | $5200 | 497 pages
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US demand to rise 6.5% annually through 2019

US demand for pharmaceutical chemicals is expected to increase 6.5 percent annually to $46.9 billion in 2019. Gains will accelerate from the average pace of the 2009-2014 period, led by the introduction of new therapies for Alzheimer’s disease, cancer, diabetes, heart failure, and healthcare-associated infections. The value of pharmaceutical chemicals demand will remain fairly evenly divided between the merchant market and the captive and contract production segment. The merchant segment will see favorable growth based on drug patent expirations and the increasing availability of many first-time generic medicines. The value of captive and contract production output will benefit from new product introductions, especially breakthrough therapies for Alzheimer’s disease, cancer, and other presently incurable conditions.

Central nervous system chemicals to remain largest segment

Active ingredients of central nervous system agents will remain the largest therapeutic group served by pharmaceutical chemicals based on value and will post above average revenue growth. Demand in this therapeutic group will benefit from the introduction of new high value-added compounds for Alzheimer’s disease, multiple sclerosis, and rheumatoid arthritis; the penetration into the marketplace of new generic drugs for arthritic pain, epilepsy, glaucoma, and schizophrenia; and the expanding use of over-the-counter pain relievers and ophthalmic solutions for self-treatment.

Hormones & related agents to be fastest growing types

Led by active ingredients of anticancer, antidiabetic, and hormone replacement formulations, hormones and related agents will post the fastest growth in value among all pharmaceutical chemicals. Based on the introduction of new antithrombolytic and heart failure therapies, cardiovascular compounds will reverse a recent downturn and expand moderately in demand value. The development of new antibiotics under the FDA’s Qualified Infectious Disease Product program, coupled with an increasing patient volume for new hepatitis C treatments, will keep revenues of anti-infective chemicals rising.

High value-added nutrients, herbal extracts, and marine derivatives for specialty adult and pediatric preparations will lead to moderate growth in nutritional chemicals demand. Advances in vaccines, especially types for viral disorders, will boost growth in value of biological chemicals. Respiratory chemicals demand will advance slowly, but will improve on a recent downturn based on new asthma and chronic obstructive pulmonary disease (COPD) therapies.
HORMONES & RELATED CHEMICALS

Monoclonal Antibodies

Demand for active ingredients of anticancer monoclonal antibodies will increase over the forecast period to over $2.1 billion in 2019. The largest-selling therapy in this group, rituximab, was the largest-selling anticancer agent in 2014. The compound is approved for the treatment of non-Hodgkin’s lymphoma and chronic lymphocytic leukemia. The compound is an indicated therapy for rheumatoid arthritis. Rituxan is delivered via infusion acts by binding directly to tumor cells and inducing apoptosis. The compound posted US sales of nearly $3.7 billion in 2014, the largest amount among all anticancer agents. The patent on Rituxan is scheduled to expire in 2018.

Rituximab -- Rituximab, which is co-marketed by Genentech and Biogen under the RITUXAN tradename, is approved for the treatment of non-Hodgkin’s lymphoma and chronic lymphocytic leukemia. The compound is an indicated therapy for rheumatoid arthritis. Rituxan is delivered via infusion acts by binding directly to tumor cells and inducing apoptosis. The compound posted US sales of nearly $3.7 billion in 2014, the largest amount among all anticancer agents. The patent on Rituxan is scheduled to expire in 2018.

Bevacizumab -- Bevacizumab is a recombinant humanized monoclonal antibody that blocks angiogenesis by inhibiting the action of vascular endothelial growth factor A. Administered through subcutaneous injection, the compound is indicated for the treatment of various forms of cancer, including colorectal, epithelial ovarian, glioblastoma, lung, and renal cell carcinoma. A previous indication involves

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Source: The Freedonia Group, Inc.
SI Group Incorporated
2750 Balltown Road
Schenectady, NY 12301
518-347-4200
http://www.siigroup.com

Annual Sales: $1.8 billion (verified by company, 1/15)
Employment: 2,800 (verified by company, 1/15)

Key Products: ibuprofen and propofol

SI Group is a manufacturer of antioxidants, engineering plastics, plastic additives, resins, surfactants, and other chemical products. The privately held company markets its products to over 90 countries worldwide.

SI Group entered the US pharmaceutical chemicals industry via the September 2014 acquisition of the ibuprofen and propofol businesses of Albemarle Corporation (Baton Rouge, Louisiana), a global supplier of specialty and fine chemicals that enhance consumer products. Ibuprofen is a nonsteroidal, anti-inflammatory agent that also exhibits analgesic and antipyretic properties. This API is widely used in both over-the-counter and prescription drugs formulated to provide temporary pain relief and fever reduction. Propofol can be used in injectable anesthetics to induce and maintain anesthesia during surgical procedures, and as a sedative for patients who are mechanically ventilated. The transaction included Albemarle’s antioxidant business, as well as a US manufacturing facility in Orangeburg, South Carolina and a Chinese production site in Jinshan. Additionally, certain technical support capabilities and related assets located in the US in Baton Rouge, Louisiana and outside the US in Shanghai, China were included in the sale.

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Related Studies

Enzymes
Enzyme demand in the United States is forecast to increase 3.0 percent annually to $2.2 billion in 2019. Changes in the medical and pharmaceutical industries will result in strong gains in enzymes used in the research and biotechnology, in vitro diagnostics, and biocatalyst industries. Polymers and nucleases will see the fastest gains among the main enzyme types. This study analyzes the $1.9 billion US enzyme industry, with forecasts for 2019 and 2024 by market and product. The study also evaluates company market share and profiles industry players. #3285............... May 2015............... $3300

Waxes
US demand for waxes will rise 1.8 percent annually through 2019 to three billion pounds, with value demand reaching $3.2 billion. Petroleum and mineral waxes will remain the dominant types, while synthetic waxes will grow the fastest. The leading industrial market will provide the best opportunities, particularly in the production of coatings and inks, adhesives, and building boards. This study analyzes the $2.4 billion US wax industry, with forecasts for 2019 and 2024 by type and market. The study also evaluates company market share and profiles industry players. #3271............... May 2015............... $200

World Dyes & Organic Pigments
World dye and organic pigment demand will rise 6.0 percent yearly to $19.5 billion in 2019. The Asia/Pacific market will remain dominant and will grow the fastest. The smaller organic pigments segment will outpace dyes due to increased use of high performance pigments in paints and coatings and plastics applications. This study analyzes the $14.5 billion world dye and organic pigment industry, with forecasts for 2019 and 2024 by product, market, world region, and for 19 countries. The study also evaluates company market share and profiles industry players. #3264.................April 2015................. $6300

World Salt
Global demand for salt is forecast to climb 1.5 percent annually to 325 million metric tons in 2018, valued at $13.4 billion. The dominant Asia/Pacific region will be the fastest growing market. Trends in the production of chlor-alkali chemicals will continue to have the most significant effect on regional salt demand. This study analyzes the 302 million metric ton world salt industry, with forecasts for 2018 and 2023 by market, production method, world region, and for 22 countries. The study also evaluates company market share and profiles industry competitors. #3199...............August 2014................ $6200

Excipients
Demand for pharmaceutical excipients in the US is projected to rise 4.3 percent per year to $2.0 billion in 2018. Gains will accelerate as excipients play a larger role in bringing additional value to pharmaceutical products by improving properties such as controlled release or absorption of active ingredients. Polymers and gelatin will be the fastest growing types. This study analyzes the $1.8 billion US excipients industry, with forecasts for 2018 and 2023 by product and application. The study also evaluates company market share and profiles industry players. #3146.............. March 2014............... $100

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