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Pharmaceutical Chemicals

US Industry Study with Forecasts for 2019 & 2024

Study #3280 | June 2015 | \$5200 | 497 pages

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The Freedonia Group

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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.

US demand to rise 6.5% annually through 2019

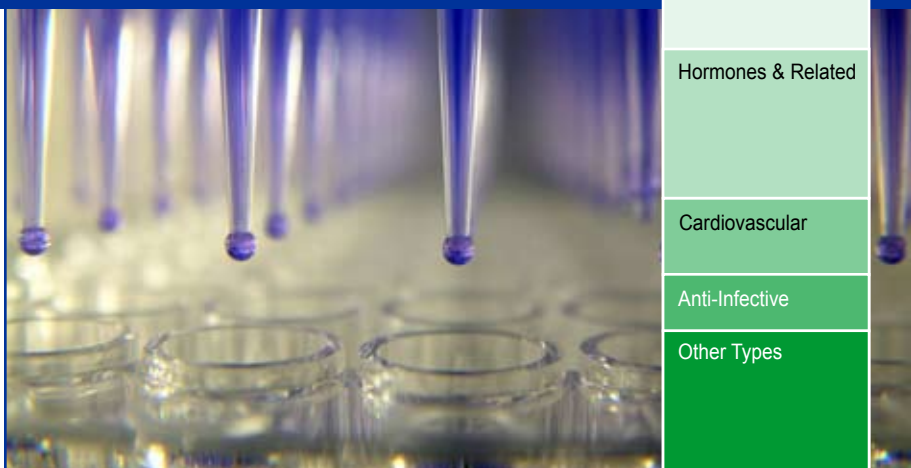
US demand for pharmaceutical chemicals is expected to increase 6.5 percent annually to \$46.9 billion in 2019. Gains will accelerate from the average pace of the 2009-2014 period, led by the introduction of new therapies for Alzheimer's disease, cancer, diabetes, heart failure, and healthcare-associated 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

US Pharmaceutical Chemicals Demand, 2019

(\$46.9 billion)



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 antithrombotic 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.

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Sample Text, Table & Chart

HORMONES & RELATED CHEMICALS

Monoclonal Antibodies

Demand for active ingredients of anticancer monoclonal antibodies will increase over the next five years. Included in this group are antibodies indicated for various malignancies. Monoclonal antibodies have a variety of applications in the management of hematologic malignancies, solid tumors, and these therapies and new drug introductions, including rituximab, trastuzumab, bevacizumab, ipilimumab, cetuximab, pertuzumab, and panitumumab.

**SAMPLE
TEXT**

Monoclonal antibodies typically provide cancer therapy to tumor-causing proteins or related receptors and inhibiting proliferation and propagation of malignant cells. Based on 2014 US sales, the largest-selling therapies in this group were rituximab, bevacizumab, trastuzumab, denosumab, ipilimumab, cetuximab, pertuzumab, and panitumumab.

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 human monoclonal antibody that blocks angiogenesis by inhibiting the activity of vascular endothelial growth factor A. Administered through intravenous injection, the compound is indicated for the treatment of various types of cancer, including colorectal, epithelial ovarian, glioblastoma, lung, and renal cell carcinoma. A previous indication involved metastatic breast cancer.

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TABLE IV-4

PAIN CONTROL CHEMICALS DEMAND
(million dollars)

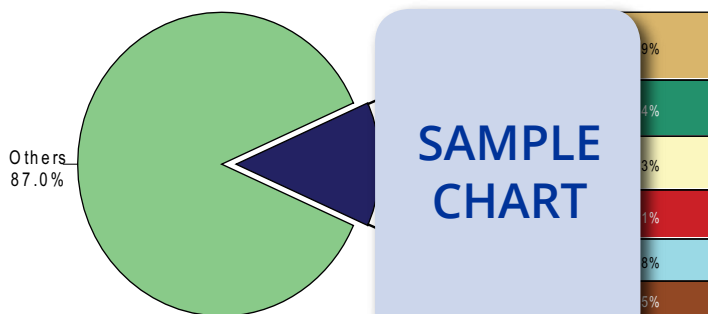
Item	2004	2009	2014	2019	2024
Chronic Conditions (mil)					
\$ chemicals/condition					
Pain Control Chemicals Demand					
By Type:					
Narcotic Analgesics					
OTC Analgesics					
NSAIDs					
Antimigraine Agents					
Anesthetics					
Hyaluronic Acid Compounds					
By Source of Supply:					
Merchant Market					
Captive/Contract Production					
By Regulatory Class:					
Ethical					
OTC					
% pain control chemicals					
CNS Pharmaceutical Chemicals					

**SAMPLE
TABLE**

Source: The Freedonia Group, Inc.

CHART XIV-1

PHARMACEUTICAL CHEMICALS:
US MERCHANT MARKET SHARE, 2014
(\$17 billion)



**SAMPLE
CHART**

Sample Profile & Table, & Study Coverage

TABLE VIII-2
HERBAL & RELATED CHEMICALS DEMAND
 (million dollars)

Item	2004	2009	2014	2019	2024
Nutritional Chemicals Demand % herbal & related chemicals					
Herbal & Related Chemicals Demand By Type:					
Herbal & Botanical Extracts					
Fish Oils					
Marine & Other Extracts					
By Source of Supply:					
Merchant Market					
Captive/Contract Production					

Source: The Freedonia Group, Inc.

SAMPLE
PROFILE

STUDY
COVERAGE

Pharmaceutical Chemicals is a Freedonia study that presents historical demand data (2004, 2009, 2014) and forecasts (2019, 2024) by active pharmaceutical type. The study also considers key market environment factors, assesses the industry structure, analyzes company market share and profiles 31 competitors in the US industry.

COMPANY PROFILES

SI Group Incorporated
 2750 Balltown Road
 Schenectady, NY 12309
 518-347-4200
<http://www.sii.com>

Annual Sales:
 Employment:
 Key Products:

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 markets. Polymerases 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.....\$5300

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.....\$5200

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 \$1.6 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.....\$5100

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

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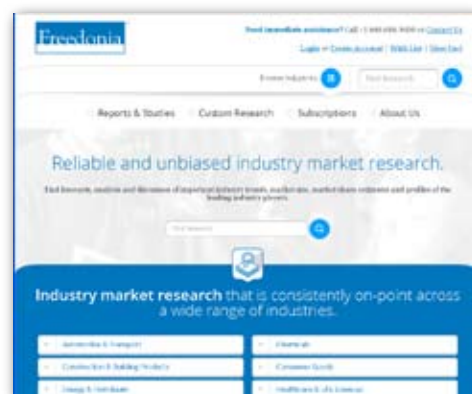
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