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Pharmaceutical Excipients Market Research Report- Forecast to 2032

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Description:

Global Pharmaceutical Excipients Market Overview

Pharmaceutical Excipients Market Size was valued at USD 9.27 billion in 2023 and is projected to grow from USD 10.02 Billion in 2024 to USD 18.48 billion by 2032, exhibiting a compound annual growth rate (CAGR) of 7.03% during the forecast period (2024 - 2032). The main market drivers driving market growth are the increased need for multifunctional excipients and the expanding use of generic medications.

Pharmaceutical Excipients Market

Excipients used in pharmaceutical formulation and development are important. These substances contain ingredients besides the drug or prodrug that is pharmacologically active. Pharmaceutical excipients facilitate drug distribution to the target site. These molecules assimilate and improve the medicine's effectiveness while preventing the drug from leaving the body too early. Some excipients used in pharmaceuticals encourage drug integration, increasing drug absorption in the bloodstream. Pharmaceutical excipients are additionally utilized to identify drugs.

Additionally, pharmaceutical excipients are utilized to improve the flavor of the medicine, which improves patient compliance, particularly in children. Depending on their chemical makeup, pharmaceutical excipients can be derived from organic and inorganic sources. The main drivers of the pharmaceutical excipients market are the rising demand for functional excipients, recent patent expirations boosting consumer appetite for pharmaceutical excipients, and the quick development of nanotechnology. Excipients can be added to solid formulations containing modest APIs for long-term stabilization, to provide the active component in the finished dosage form more potency, or for any other reason. Excipients are also utilized to enhance the features of medication formulations, such as improving drug absorption, lowering viscosity, and enhancing API solubility.

The pharmaceutical market is expanding due to the expanding pharmaceutical sector and rising pharmaceutical manufacturing. Among other things, organic chemicals also include proteins, oleochemicals, petrochemicals, and carbohydrates. Pharmaceutical excipients may serve in various capacities, including sweeteners, binders, disintegrants, suspension or coating agents, flavoring agents, colorants, fillers, diluents, lubricants and glidants, and preservatives. Additionally, the introduction of new products helps the market expand. Over time, the pharmaceutical sector has understood that binders can help active pharmaceutical compounds perform better and give them a competitive edge. Additionally, the need for binders is anticipated to rise along with an upsurge in pharmaceutical output, which is anticipated to fuel the segment's expansion. This market's expansion is primarily driven by improved topical excipient absorption from liquid APIs and increased patient compliance due to sensory impacts. Furthermore, a significant CAGR is projected for the Topical during the projection year.

To ensure that these goods fulfill the standards for purity and quality that they claim or are represented to possess, the World Health Organization seeks to modify its guidelines on manufacturing pharmaceutical excipients.

The Central Drugs Standard Control Organization is considering making it mandatory that excipients be listed on the medication strip for safe use. According to the study, CDSCO sources stated that it is crucial to make individuals aware of the medications they are taking since they are supposed to be able to make educated decisions.

**In October 2023**, a company named Clariant, which focused on sustainability and specialized in chemicals, made an announcement about the addition of new highly effective compounds used as pharmaceutical ingredients to facilitate the development of safe and efficacious drugs. At CPHI Barcelona, Clariant is expected to introduce three new VitiPure® excipients, allowing for multiple Active Pharmaceutical Ingredient (API) formulations and administration routes that are even suitable for sensitive ones like mRNA vaccines and biological medications, thereby positioning itself as an all-inclusive solution provider. It uniquely provides customers with a choice of three Polysorbate 80 purity grades: Standard, Low Microbial, and Highly Purified, as well as three PEG 35 Castor Oil purity levels, namely Standard, highly purified" and low microbial."

**In February 2024**, Vadodara-based Alembic Pharmaceuticals Limited plans to launch five to six new products every quarter in the US market. The company launched eleven additional items during Q3FY24 of this financial year and twenty new products in the first nine months of FY24. "If these newly introduced brands get good acceptance from customers at stable prices, then we could have good business coming out from this particular market," said CFO RK Baheti. The sale of US Generics by Alembic Pharma for Q3 picked up to \$57 million compared to \$53 million recorded in Q2FY24 due to new launches as well as volume gains for existing drugs. Especially in the American market, the generic drug industry has experienced a lot of price deflation lately. However, it is expected that this trend will change due to increasing product launches and although prices still remain under pressure in certain therapeutic areas.

**In October 2023**, Lupin, the global generics major based in Mumbai announced that it had received tentative approval from United States Food and Drug Administration (US FDA) for its abbreviated new drug application (ANDA) for apalutamide tablets 60mg as a generic version for Erleada tablets 60mg developed by Janssen Biotech, Inc. The company expects to make the product at its Pithampur facility in India. The RLD Erleada or Apalutamide 60 mg (RLD Erleada) had estimated annual sales of \$1,185.5 million in the US. It has also received tentative approval from the

## Pharmaceutical Excipients Market Trends

- **Growing demand of medical drug and pharmaceutical need rises to boost market growth**

The demand for pharmaceuticals from public hospitals around the world has increased compared to the time before COVID-19, according to a recent study published by JAMA Network. Azithromycin, Hydroxychloroquine, Corticosteroids, and Heparin have each shown a rise in usage of 11.45%, 6.14%, 24.68%, and 49.05%, respectively, according to the report. The need for pharmaceutical excipients, which are needed to produce medical pharmaceuticals, will rise significantly along with the demand for medical drugs and medicines, fueling market expansion in the years to come.

The pharmaceutical market is expanding due to the expanding pharmaceutical sector and rising pharmaceutical manufacturing. For instance, the output of pharmaceuticals in the European region was valued at EUR 286,697 million in 2020 and EUR 300 million in 2021, according to the 2022 study from the European Federation of Pharmaceutical Industries and Associations. The demand for pharmaceutical excipients is increased as a result of such an increase in production value, which also corresponds to the rise in the amount of pharmaceutical manufacturing. Additionally, it is anticipated that market participants' expansion of facilities to create high-performance ingredients will accelerate the industry's growth.

Biopharmaceuticals are becoming more and more well-liked in the healthcare sector. Their striking resemblance to biological substances naturally found in the human body is the primary cause of this since they provide excellent effectiveness with few adverse effects. They are regarded as one of the pharmaceutical industry's segments with the quickest growth rates. Biopharmaceutical products' capacity to cure ailments previously thought to be incurable has contributed significantly to the expansion of biopharmaceutical drugs across many countries due to their high efficacy and excellent safety. For instance, new candidates for biopharmaceuticals are emerging in nations like China and India, according to a recent study published on Biosimilar Development. Furthermore, it claims there are more than 150 biomanufacturing facilities in China alone. As a result, in recent years, the market CAGR of the pharmaceutical excipients increased.

Another reason fueling the market revenue of the Pharmaceutical Excipients is the development of more advanced excipients by pharmaceutical companies that play a more significant role in drug delivery.

## Pharmaceutical Excipients Market Segment Insights

### Pharmaceutical Excipients Function Insights

Based on functions, the market segments of pharmaceutical excipients includes pharmaceutical fillers, binders, coatings, disintegrants, preservatives, and others. The Binders segment held the majority share in 2022, contributing to around ~33% concerning the Pharmaceutical Excipients market revenue. This is because end-user industries have a high need for fillers and diluents since they are necessary for the formulation of capsules and tablets, the two types of formulations that are now the most prevalent.

### Pharmaceutical Excipients Product Insights

The Pharmaceutical Excipients market data has bifurcated by-products into organic and inorganic chemicals. The Organic Chemicals segment dominated the market in 2022 and is projected to be the faster-growing segment during the forecast period, 2022-2030. Carbohydrates, petrochemicals, oleochemicals, and proteins make up most organic chemical-based medicinal excipients. These chemicals are essential to all medications and are crucial to the medication's ability to achieve its goals. Increasing desire for medicines made from natural resources with fewer adverse effects. The use of HPMC organic compounds in the life sciences sectors and the rapid increase of pharmaceutical products with an oral fixed-dose combination are driving this market's expansion.

### Pharmaceutical Excipients Applications Insights

Based on Applications, the pharmaceutical excipients market segmentation has been segmented into Oral, Topical, Parenteral, and others. Oral held the most significant segment share in 2022. Due to their widespread use and effectiveness in treating many diseases. Medical specialists recommended antitubercular medications as the first line of treatment during the Covid-19 health crisis. Due to their efficacy in treating pneumonia and respiratory infections, these drugs were in high demand during the pandemic. The need for oral formulations is rising since they are created in tablet form for oral use, which in turn is assisting in the market's overall expansion in value sales.

The fastest-growing segment in the Pharmaceutical Excipients industry is topical. Better absorption of topical excipients with liquid APIs and higher patient compliance due to sensory effects are the key drivers of this segment's growth. Additionally, it is anticipated that the Topical would exhibit a sizable CAGR during the projection period. The strong absorption of topical excipients is driving the development of this market with liquid APIs and better patient compliance because of sensory effects.

**Figure 2: Pharmaceutical Excipients Market, by Application, 2022 & 2030 (USD billion)**

**Pharmaceutical Excipients Market, by Application, 2022 & 2030**

**Source: Secondary Research, Primary Research, MRFR Database and Analyst Review**

The third-largest manufacturer of hard capsules for oral dosage solutions, Qualicaps, has agreed to be acquired by Roquette, which deals with plant-based components and pharmaceutical excipients. The acquisition strengthens Roquette's position as a significant supplier to the pharmaceutical sector. The merger of the two companies will benefit Roquette's strategic expansion plan and open up new commercial prospects for Qualicaps' clients and staff.

## Pharmaceutical Excipients Regional Insights

Asia-Pacific, Europe, North America, and the rest of the world are covered in the study's market insights by region. In 2022, the Europe Pharmaceutical Excipients market was valued at USD 2.51 billion and was anticipated to rise at a substantial CAGR. Due to the upcoming medicine patent expiration dates, many European countries focus on the

generics business. As a result, it is anticipated that significant growth rates will occur throughout the projected period in European countries, including Germany, the United Kingdom, France, and others. In the area, the need for pharmaceutical excipients is anticipated to rise.

Further, the major countries studied in the market report are: The U.S, Canada, India, Germany, France, UK, Italy, Spain, China, Japan, Australia, South Korea, and Brazil.

**Figure 3: PHARMACEUTICAL EXCIPIENTS MARKET SHARE BY REGION 2022 (%)**  
**PHARMACEUTICAL EXCIPIENTS MARKET SHARE BY REGION 2022**

**Source: Secondary Research, Primary Research, MRFR Database and Analyst Review**

The market for pharmaceutical excipients North America holds the second-largest share. The rapidly expanding pharmaceutical sector, rising demand for functional excipients, significant competitors in the area, and technological improvements will all significantly contribute to the market's growth over the forecast period. Additionally, the North American the US market of pharmaceutical excipients had the most significant market share, while the Canada market of pharmaceutical excipients had the quickest rate of expansion.

The market of pharmaceutical excipients in Asia-Pacific is anticipated to expand at the quickest CAGR between 2024 and 2032. A recent study indicated that China's total traditional pharmaceutical sales revenue will continue to grow over the following years. In addition, the Indian pharmaceutical industry supplies 25% of all medications in the UK and 40% of the demand for generic drugs in the US during the current COVID-19 pandemic, according to recent reports from the India Brand Equity Foundation (IBEF). The India Pharmaceutical Excipients market had the highest growth rate in the Asia-Pacific region, while China Pharmaceutical Excipients held the most significant market share.

#### **Pharmaceutical Excipients Key Market Players & Competitive Insights**

Major market players are spending a lot of money on R&D to increase their product lines, which will help the market grow even more. Market participants are also taking a range of strategic initiatives to grow their worldwide footprint, with key market developments such as new product launches, contractual agreements, mergers and acquisitions, increased investments, and collaboration with other organizations. Competitors in the Pharmaceutical Excipients industry must offer cost-effective items to expand and survive in an increasingly competitive and rising market environment.

Major market players are investing a lot of money in R&D to expand their product portfolios, which will spur further market growth for pharmaceutical excipients. With crucial market developments like new product releases, contractual agreements, mergers and acquisitions, increased investments, and collaboration with other organizations, market participants are also undertaking various strategic activities to expand their presence. Pharmaceutical Excipients sector competitors must provide affordable products to grow and compete in a market that is becoming increasingly competitive.

Making products locally to cut operational costs is one of the leading business tactics producers use worldwide Pharmaceutical Excipients to benefit customers and grow the market sector. Some of the most significant advantages to medicine in recent years have come from the pharmaceutical excipients industry. The Pharmaceutical Excipients market major player such as Lubrizol Life Science (LLS) Health, CD Formulation and others are working to expand the market demand by investing in research and development activities.

The Health division of Lubrizol Life Science (LLS Health) collaborates with clients to hasten the commercialization of novel pharmaceuticals and medical devices. LLS Health offers distinctive components, subassemblies, and complete medical device design, development, and manufacturing services. In May 2022, Apisolex was introduced in the United States by Lubrizol Life Science (LLS) Health, one of the world leaders in accelerating success and innovation in pharmaceutical research. It is a brand-new excipient for parenteral medicinal formulations that improve solubility. This approach gets rid of solubility problems that can't be fixed by excipients or manufacturing processes currently in use.

Also, Leading producer of food, cosmetic, and pharmaceutical excipients, CD Formulation, works with the pharmaceutical and personal care industries to enhance the performance of their products. In March 2022, CD Formulation has addressed a long-standing problem in medication development, poor bioavailability, by creating customized solutions for higher bioavailability excipients.

#### **Key Companies in the Pharmaceutical Excipients market includes**

- Evonik Industries Ag,
- Basf Se,
- Ferro Corporation,
- P&G Chemicals,
- Akzo Nobel NV,
- FMC Corporation,
- The Dow Chemical Company,
- Ashland, Inc.,
- Croda International PLC), among others

#### **Pharmaceutical Excipients Industry Developments**

**April 2022:** Three starch-based excipients, including Nutroféli ST100 (native starch), Nutroféli ST200 (partially pregelatinized starch), and Nutroféli ST300, were introduced by DFE Pharma to broaden its line of nutraceuticals. These are naturally derived, multipurpose excipients that adhere to both food and pharmaceutical standards and can be utilized as binders, fillers, and other uses for oral solid dosage forms.

**June 2022:** The distributor of aromatic chemicals Ashapura Aromas Pvt has decided to sell most of its stock to Azelis, a business specializing in chemicals and raw materials. According to two sources with knowledge of the transaction, the acquisition was likely concluded for \$150 million.

# Pharmaceutical Excipients Market Segmentation

## Pharmaceutical Excipients Function Outlook

- Pharmaceutical Fillers
- Binders
- Coatings
- Disintegrants
- Preservatives
- Others

## Pharmaceutical Excipients Application Outlook

- Organic Chemicals
- Inorganic Chemicals

## Pharmaceutical Excipients Product Outlook

- Oral
- Topical
- Parenteral
- Others

## Pharmaceutical Excipients Regional Outlook

- North America
  - US
  - Canada
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Spain
  - Rest of Europe
- Asia-Pacific
  - China
  - Japan
  - India
  - Australia
  - South Korea
  - Australia
  - Rest of Asia-Pacific

- Rest of the World

- Middle East

- Africa

- Latin America

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