

ACTIVE PHARMACEUTICAL INGREDIENTS FACTS & FIGURES



APIs (Active Pharmaceutical Ingredients) are responsible for the pharmaceutical effect of formulated pharmaceuticals (medicines).

They are produced using highly technological industrial processes, both during the R&D and commercial production phases.



The API market is increasingly a **global business integrated** in the **supply chain of pharmaceuticals**, in
which APIs constitute the most **important components** in
terms of clinical efficacy and value.



THE API MARKET'S OUTLOOK IS POSITIVE



with a healthy growth rate for the next years foreseen at



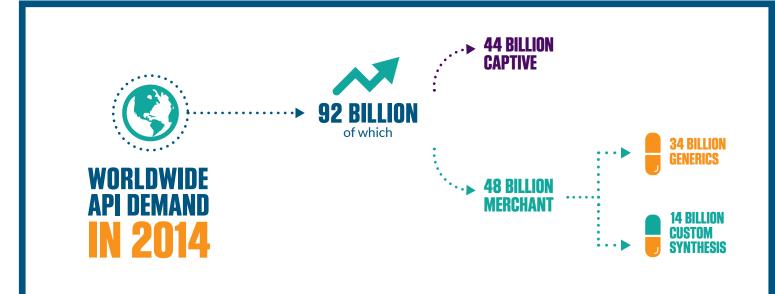
4.5% P.A. in the generic sector



4.8% P.A.



The growing trend towards new high tech therapeutics coupled with the emergence of novel and innovative delivery systems and the evolution of personalized medicines will only serve to further emphasise the growing demand for advanced APIs.



MERCHANT DEMAND FOR APIS: 48 BILLION USD



Z9.1 % NORTH AMERICA



Z/LJ% ASIA FAD FAST



25.7% WESTERN EUROPE



16.7% REST OF THE WORLD

The demand for active pharmaceutical ingredients in Western Europe is **concentrated mainly** in the **United Kingdom** and **Germany**, essentially in relation to the higher proportion of sales of generics drugs in these countries.

¹ 2014 estimate

API PRODUCTION WORLDWIDE



60.5% ASIA FAR EAST



2/.9% WESTERN EUROPE



4.6% NORTH AMERICA



REST OF THE WORLD



Clients are demanding more quality and more reliability from their API sources to avoid public health risks



The trend towards outsourcing by big pharmaceutical multinationals **is expected to continue growing,** which will result in an **increased demand** for quality APIs



Companies are **increasing their size** to face global competition. Mergers and acquisitions are taking place in order to **pursue global projects**



There is a **growing investment in R&D** for API production processes, as well in **quality, environment** and **safety,** resulting in better, safer and **cleaner technologies** and substantial increase of pharmaceutical technology know-how and intellectual property

SOCIO ECONOMIC IMPACT IN EUROPE









ITALY & SPAIN

are the **main producers** of generic APIs

