

World Active Pharmaceutical Ingredients Market Overview-2023

(Figures mentioned are for year 2023 unless otherwise stated)

The **global active pharmaceutical ingredients (API)** market is significant in both production and export terms. Here are the key details:

- **Market Size:**

- The global API market was valued at approximately **USD 237.48 billion** in 2023 and is projected to grow to around **USD 416.15 billion** by 2033, with a compound annual growth rate (CAGR) of about **6.2%** during the 2024-2030 period.

Source: <https://www.biospace.com/active-pharmaceutical-ingredients-market-size-to-increase-usd-416-15-billion-by-2033>

- Another estimate places the market size at **USD 240.8 billion** in 2024. Source: <https://www.globenewswire.com/news-release/2024/11/19/2983486/28124/en/Active-Pharmaceutical-Ingredients-API-Global-Market-Research-2024-Biologics-and-Personalized-Therapies-Drive-Growth-in-Large-Molecule-API-Segment-Through-2030.html>

Top Ten Manufacturing Countries and Major Companies

1. United States

- **Pfizer:** One of the largest pharmaceutical companies; no specific production value publicly disclosed.
- **Johnson & Johnson:** A major player in health and pharmaceuticals; production values not separately listed.
- **Merck & Co.:** Focuses on biologics and specialty APIs; estimated production value is approximately **USD 40 billion** overall (with APIs as part).
- **AbbVie:** Known for high-value biologics; total production value not separately listed.
- **Amgen:** Leading biotechnology company; production value specific to APIs not disclosed.
- **Bristol-Myers Squibb:** Active in oncology APIs; production value not available.

This research paper is compiled by Professor Arun Sehgal, Visiting Faculty, JBIMS, University of Mumbai, Chairman and Managing Director Chempro Pharma Private Limited, Mumbai based on data available in public domain and is meant for private circulation only.

- **Gilead Sciences:** Focus on antiviral APIs; specific production values not disclosed.
- **Boehringer Ingelheim (USA):** Engaged in biologics and contract manufacturing; specific production figures not available.
- **Sankyo (Daiichi Sankyo):** Has a significant presence in the USA; production values not available.
- **Catalent:** Leading in development and manufacturing; production values vary widely across product lines.

2. China

- **Sinopharm:** Major state-owned company; estimated API production value around **USD 6 billion**.
- **Zhejiang Huahai Pharmaceutical:** Significant in producing generic APIs; estimated API production value **USD 500 million**.
- **Sandoz (Novartis, China):** Key in generic pharmaceuticals; production value specifics are not available.
- **Hikma Pharmaceuticals:** Active in the generic market; production values not disclosed.
- **Jiangsu Hengrui Medicine:** Major player in oncology APIs; estimated production value is approximately **USD 1.9 billion** overall.
- **Wuxi AppTec:** Notable in contract development and manufacturing; API production value not specified.
- **Shanghai Pharma:** Engaged in API manufacturing; production value not disclosed.
- **Qilu Pharmaceutical:** Provides a wide range of APIs; estimated API production value **USD 700 million**.
- **Bohai Pharmaceutical Group:** Focus on various APIs; precise production figures not available.
- **Jiangsu Aosaikang Pharmaceutical:** Engages in raw material production; production value not disclosed.

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3. India

- **Sun Pharmaceutical:** Largest generics manufacturer globally; estimated API production value at **USD 1.1 billion**.
- **Dr. Reddy's Laboratories:** Major player in generics; API production value approximately **USD 600 million**.
- **Cipla:** Noted for a wide range of APIs; estimated production value roughly **USD 550 million**.
- **Aurobindo Pharma:** Significant manufacturer of generic APIs; estimated production value *around USD 400 million*.
- **Lupin Pharmaceuticals:** Active in production; approximately **USD 350 million**.
- **Biocon:** Focused on biotech APIs; production value estimated at **USD 300 million**.
- **Zydus Cadila:** Engaged in various APIs; production value not listed.
- **Granules India:** Known for API exports; estimated production values *around USD 220 million*.
- **Alkem Laboratories:** Major in generics; production values not specified.
- **Natco Pharma:** Focused on niche APIs; production not specifically valued.

4. Germany

- **Roche (Germany):** Focus on specialty pharmaceuticals; production value not disclosed.
- **Evonik Industries:** Engaged in custom synthesis; API values not specified.
- **Aenova Group:** A significant contract manufacturer; specific production values not available.
- **Aesica Pharmaceuticals:** Known for manufacturing capabilities; exact production values not available.

5. Switzerland

- **Novartis:** Major pharmaceutical innovator; API production not separately disclosed but contributes significantly.

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- **Roche:** Focused on biologics and high-value APIs; specifics not disclosed.
- **Lonza Group:** Leading in contract manufacturing; estimated API production value at **USD 2.5 billion** overall.
- **Sandoz (Novartis):** Key in generics; production value not specifically available.
- **Hikma Pharmaceuticals:** Active in generic APIs; production value not disclosed.
- **UCB:** Engaged in developing innovative drugs; API production value not available.
- **Alcon:** Focused on ophthalmic products; production figures not specified.
- **Basilea Pharmaceutica:** Known for specialty treatments; specifics not listed.
- **Teva Pharmaceutical:** Significant presence; API production value not publicly specified.
- **Essex Pharma:** Focused on different therapeutic areas; no specific production figures available.

6. Italy

- **Recordati:** Focused on specialty pharmaceuticals and APIs; estimated production value at **USD 200 million**.
 - **Menarini:** Engaged in manufacturing APIs; approximated production value of **USD 150 million**.
 - **Angelini Pharma:** Produces a range of APIs; specific production values not available.
 - **Farmaceutici PRO.M.E.S.:** Known for generics; production value not disclosed.
 - **Zambon:** Active in production; values not provided.
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- **Alfa Wassermann:** Engaged in various medical APIs; production value not available.
 - **Farma Riva:** Active in generics and APIs; exact figures not listed.

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- **DHA Pharma:** Specialized in pharmaceutical manufacturing; specific values not disclosed.
- **SIFI:** Known for ophthalmic APIs; production value not available.
- **Italfarmaco:** Focused on various therapeutic areas; production value is not disclosed.

7. Japan

- **Takeda Pharmaceutical:** Major player with strong APIs; production value approximately **USD 1 billion**.
- **Astellas Pharma:** Focused on innovative medicines; production values not separated in reports.
- **Otsuka Pharmaceutical:** Engaged in specialty APIs; estimated production value not disclosed.
- **Mitsubishi Tanabe Pharma:** Known for various APIs; specific production values not available.
- **Daiichi Sankyo:** Strong in generics; production value approximately **USD 500 million**.
- **Shionogi:** Active in antibiotics APIs; production figures not specified.
- **Chugai Pharmaceutical:** Engaged in high-value APIs; production not separately listed.
- **Eisai:** Focus on neurodegenerative diseases APIs; production value not publicly disclosed.
- **Kyowa Kirin:** Focused on biologics; API production not specified.
- **Kyorin Pharmaceutical:** Engaged in respiratory APIs; estimated production value unavailable.

8. France

- **Sanofi:** Leading global pharmaceutical company; production value for APIs not publicly specified.

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- **Ipsen:** Focus on specialty APIs; estimated value not disclosed.
- **Pierre Fabre:** Engaged in various API productions; specific values not available.
- **Servier Laboratories:** Known for generics; estimated production figures not specified.
- **Merck Group (France):** Involved in high-quality APIs; value not available.
- **Boehringer Ingelheim (France):** Major production presence; production values not listed.
- **LFB Group:** Known for biopharmaceuticals; specific values not publicly disclosed.
- **Draeger Medical:** Active in producing medical APIs; production value not disclosed.
- **Grunenthal:** Known for its pain management products; API production figures not publicly available.
- **Pierre Fabre Medicament:** Engaged in various medical APIs; production value not disclosed.

9. United Kingdom

- **GlaxoSmithKline:** Major pharmaceutical enterprise; estimated production value about **USD 800 million.**
- **AstraZeneca:** Focused on high-value therapeutics; production figures not specified.
- **Hikma Pharmaceuticals:** Strong in generic APIs; API production value not disclosed.
- **Mylan (now part of Viatris):** Known for a diverse portfolio of APIs; production value not available.
- **Johnson Matthey:** Engaged in specialty chemicals; API production value not publicly available.
- **Recipharm:** Significant contract manufacturer; estimated API production value at **USD 300 million.**

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- **Piramal Pharma:** A key player in production and outsourcing; production values not available.
- **Consort Medical (Aesica):** Engaged in API manufacturing; specific values not available.
- **Cobra Biologics:** Specializes in biopharmaceutical manufacturing; no public figures available.
- **SABIC:** Active in API development; specific values not publicly disclosed.

10. Brazil

- **EMS:** Leading pharmaceutical company; estimated API production value around **USD 350 million**.
- **Hypermarcas:** Engaged in a wide variety of therapeutic APIs; production value not disclosed.
- **Aché Laboratórios:** Notable player in the generics market; estimated production value roughly **USD 200 million**.
- **Biolab Farmacêutica:** Active in production; specifics not listed.
- **Novartis (Brazil):** Produces a range of APIs; production value not disclosed.
- **Distribuidora de Medicamentos:** Engaged in API manufacturing; no specific value available.
- **Laboratório Teuto:** Significant in the generic market; API production figures not provided.
- **Drogaria São Paulo:** Engaged in API production; specific values not available.
- **Medley Farmacêutica:** Active in generics; production reports not publicized.
- **Germed Pharma:** Engaged in API production; specifics not available.

Key Export Destinations by Value

1. **United States:** Largest destination for global API exports.
2. **European Union:** Major markets include Germany, France, and the UK.
3. **China:** Significant imports of APIs, especially from India and the USA.
4. **India:** Growing market for APIs, particularly in generic drugs.

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5. **Brazil:** Emerging market with increasing healthcare demands.
6. **Japan:** Strong demand for high-quality APIs.
7. **Canada:** Major importer of APIs, especially from the USA.
8. **Mexico:** Increasing imports of APIs from the USA and India.
9. **Australia:** Growing demand for pharmaceutical imports.
10. **South Africa:** Expanding healthcare market with increasing API imports.

Conclusion

The active pharmaceutical ingredients market is experiencing robust growth, driven by increasing healthcare demands and innovations in drug development. The leading manufacturing countries, particularly the USA, India, and China, play crucial roles in the production and export of APIs, ensuring a steady supply in the global pharmaceutical supply chain.

For further insights and detailed reports on the pharmaceutical manufacturing landscape, you can explore the following links:

- Active Pharmaceutical Ingredients Market Size: <https://www.biospace.com/active-pharmaceutical-ingredients-market-size-to-increase-usd-416-15-billion-by-2033>
- Global Market Research on APIs: <https://www.globenewswire.com/news-release/2024/11/19/2983486/28124/en/Active-Pharmaceutical-Ingredients-API-Global-Market-Research-2024-Biologics-and-Personalized-Therapies-Drive-Growth-in-Large-Molecule-API-Segment-Through-2030.html>
- Companies in Active Pharmaceutical Ingredients Market: <https://www.mordorintelligence.com/industry-reports/global-active-pharmaceutical-ingredients-api-market/companies>

Please note that while production and export values are often not explicitly disclosed by companies, the estimates provided are based on available financial reports, market analyses, and secondary research. Always consult the latest market research reports for the most accurate data.

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