

CHAPTER ONE: INTRODUCTION.....	1
STUDY OBJECTIVES.....	1
REASONS FOR DOING THIS STUDY.....	1
INTENDED AUDIENCE.....	2
SCOPE OF THE STUDY.....	2
METHODOLOGY.....	2
INFORMATION SOURCES.....	2
ABOUT THE AUTHOR.....	3
RELATED BCC RESEARCH REPORTS.....	3
BCC ONLINE SERVICES.....	3
DISCLAIMER.....	4
 CHAPTER TWO: SUMMARY.....	 5
SUMMARY.....	5
<i>SUMMARY TABLE WORLDWIDE PHARMACEUTICAL CONTRACT</i>	
<i>MANUFACTURING AND CONTRACT RESEARCH</i>	
<i>ORGANIZATIONS REVENUE, THROUGH 2014 (\$ BILLIONS).....</i>	<i>6</i>
<i>SUMMARY FIGURE WORLDWIDE PHARMACEUTICAL CONTRACT</i>	
<i>MANUFACTURING AND CONTRACT RESEARCH</i>	
<i>ORGANIZATIONS REVENUE, 2007-2014 (\$ BILLIONS).....</i>	<i>7</i>
 CHAPTER THREE: OVERVIEW.....	 8
DEFINITIONS.....	8
CONTRACT MANUFACTURING.....	8
CONTRACT MANUFACTURER.....	8
TYPES OF CONTRACT MANUFACTURERS.....	9
CORE COMPETENCIES.....	9
VENDOR.....	9
CONTRACT RESEARCH ORGANIZATION (CRO).....	9
HISTORY OF OUTSOURCING.....	9
HISTORY OF OUTSOURCING (CONTINUED).....	10
HISTORY OF OUTSOURCING (CONTINUED).....	11
 CHAPTER FOUR: CONTRACT MANUFACTURING.....	 12
NEED FOR CONTRACT MANUFACTURING.....	12
FLEXIBILITY.....	12
CAPACITY AND CAPITAL.....	12
RISK.....	12
ADVANTAGES OF CONTRACT MANUFACTURING.....	13
<i>TABLE 1 KEY ADVANTAGES OF CONTRACT MANUFACTURING.....</i>	<i>13</i>
<i>TABLE 1 (CONTINUED).....</i>	<i>14</i>
SELECTION OF CONTRACT MANUFACTURER.....	14
MISCONCEPTIONS REGARDING CONTRACT MANUFACTURERS.....	15
 CHAPTER FIVE: CONTRACT RESEARCH.....	 16

INCLUDED IN RESEARCH	16
DRUG DISCOVERY AND DEVELOPMENT	16
CLINICAL RESEARCH.....	17
ANALYTICAL RESEARCH.....	17
NEED FOR CONTRACT RESEARCH	17
SERVICES OFFERED BY CONTRACT RESEARCH ORGANIZATION.....	18
SELECTION AND MANAGEMENT OF CRO	18
 CHAPTER SIX: CONTRACT PACKAGING	 19
CONTRACT PACKAGING.....	19
THE NEED FOR CONTRACT PACKAGING	20
CRITERIA FOR THE SELECTION OF A PACKAGING SERVICE	20
LOCATION.....	21
EXPERIENCE.....	21
PERSONALITY	21
FINANCIAL STRENGTH.....	21
ADVANTAGES OF CONTRACT PACKAGING.....	21
ADVANTAGES OF CONTRACT PACKAGING (CONTINUED)	22
 CHAPTER SEVEN: THE NEED FOR PROJECT MANAGEMENT	 23
PROJECT EVALUATION AND SET UP	23
PLANNING AND EXECUTION	24
QUALITY MANAGEMENT	24
MANAGEMENT OF QUALITY COMPONENTS FROM	
CLIENT'S PERSPECTIVE.....	25
MANAGEMENT OF QUALITY COMPONENTS FROM THE	
CMO PERSPECTIVE	25
Management of Quality Components ... (Continued).....	26
 CHAPTER EIGHT: REGULATORY ASPECTS.....	 27
SHORT SUPPLY ARRANGEMENTS.....	27
DIVIDED MANUFACTURING ARRANGEMENTS.....	28
SHARED MANUFACTURING ARRANGEMENTS	29
RESPONSIBILITIES OF EACH PARTICIPATING	
MANUFACTURER.....	29
CONTRACT MANUFACTURING ARRANGEMENTS	30
RESPONSIBILITIES OF LICENSED MANUFACTURER.....	30
<i>TABLE 2 RESPONSIBILITIES OF LICENSED MANUFACTURER</i>	
<i>UNDER FDA ACTS</i>	31
RESPONSIBILITIES OF THE CONTRACT MANUFACTURER.....	31
WARNING LETTERS.....	32
WARNING LETTERS ISSUED TO CONTRACT	
MANUFACTURERS.....	32
Warning Letters Issued to ... (Continued)	33
APPROVALS OF MANUFACTURING FACILITIES.....	34

CHAPTER NINE: INDUSTRY STRUCTURE	35
MARKET SHARES OF INDUSTRY LEADERS	35
CONTRACT MANUFACTURERS OF BULK DRUGS AND APIS.....	35
<i>TABLE 3 WORLDWIDE MARKET SHARES OF CONTRACT MANUFACTURING COMPANIES PROVIDING BULK DRUGS/API, 2009 (%).....</i>	35
<i>FIGURE 1 WORLDWIDE MARKET SHARES OF CONTRACT MANUFACTURING COMPANIES PROVIDING BULK DRUGS/API, 2009 (%).....</i>	36
CONTRACT MANUFACTURERS OF SOLID DOSAGE FORMS	36
<i>TABLE 4 WORLDWIDE MARKET SHARES OF CONTRACT MANUFACTURING COMPANIES PROVIDING SOLID DOSAGE FORMS, 2009 (%).....</i>	36
<i>TABLE 4 (CONTINUED).....</i>	37
<i>FIGURE 2 WORLDWIDE MARKET SHARES OF CONTRACT MANUFACTURING COMPANIES PROVIDING SOLID DOSAGE FORMS, 2009 (%).....</i>	37
CONTRACT MANUFACTURERS OF LIQUID DOSAGE FORMS	38
NONSTERILE.....	38
<i>TABLE 5 WORLDWIDE MARKET SHARES OF CONTRACT MANUFACTURING COMPANIES PROVIDING NON-STERILE LIQUID DOSAGE FORMS, 2009 (%).....</i>	38
<i>FIGURE 3 WORLDWIDE MARKET SHARES OF CONTRACT MANUFACTURING COMPANIES PROVIDING NON-STERILE LIQUID DOSAGE FORMS, 2009 (%).....</i>	39
STERILE	39
<i>TABLE 6 WORLDWIDE MARKET SHARES OF CONTRACT MANUFACTURING COMPANIES PROVIDING STERILE LIQUID DOSAGE FORMS, 2009 (%).....</i>	39
<i>TABLE 6 (CONTINUED).....</i>	40
<i>FIGURE 4 WORLDWIDE MARKET SHARES OF CONTRACT MANUFACTURING COMPANIES PROVIDING STERILE LIQUID DOSAGE FORMS, 2009 (%).....</i>	40
CONTRACT MANUFACTURERS OF SEMISOLID DOSAGE FORMS	40
<i>TABLE 7 WORLDWIDE MARKET SHARES OF CONTRACT MANUFACTURING COMPANIES PROVIDING SEMISOLID DOSAGE FORMS, 2009 (%).....</i>	41
<i>FIGURE 5 WORLDWIDE MARKET SHARES OF CONTRACT MANUFACTURING COMPANIES PROVIDING SEMISOLID DOSAGE FORMS, 2009 (%).....</i>	41
CONTRACT RESEARCH COMPANIES	41
<i>TABLE 8 WORLDWIDE MARKET SHARES OF CONTRACT RESEARCH COMPANIES, 2009 (%).....</i>	42

<i>FIGURE 6 WORLDWIDE MARKET SHARES OF CONTRACT RESEARCH COMPANIES, 2009 (%)</i>	42
CONTRACT PACKAGING COMPANIES	43
<i>TABLE 9 WORLDWIDE MARKET SHARES OF CONTRACT PACKAGING COMPANIES, 2009 (%)</i>	43
<i>FIGURE 7 WORLDWIDE MARKET SHARES OF CONTRACT PACKAGING COMPANIES, 2009 (%)</i>	44
TYPES OF CONTRACT MANUFACTURING AND RESEARCH FIRMS	44
<i>TABLE 10 SERVICES PROVIDED BY CONTRACT MANUFACTURING AND RESEARCH FIRMS</i>	45
<i>TABLE 10 (CONTINUED)</i>	46
<i>TABLE 10 (CONTINUED)</i>	47
<i>TABLE 10 (CONTINUED)</i>	48
<i>TABLE 10 (CONTINUED)</i>	49
<i>TABLE 10 (CONTINUED)</i>	50
<i>TABLE 10 (CONTINUED)</i>	51
<i>TABLE 10 (CONTINUED)</i>	52
<i>TABLE 11 SERVICES PROVIDED BY CONTRACT PACKAGING FIRMS BY PACKAGING TYPE</i>	53
CHAPTER TEN: TECHNOLOGY TRANSFER	54
REASONS FOR TECHNOLOGY TRANSFER.....	54
CHALLENGING PROBLEMS DURING TECHNOLOGY TRANSFER.....	55
PRELIMINARY STEPS TOWARD TECHNOLOGY TRANSFER	56
STEPS FOR SUCCESSFUL TECHNOLOGY TRANSFER	56
TYPES OF CONTRACTUAL AGREEMENTS USED IN TECHNOLOGY TRANSFER	57
CONFIDENTIAL DISCLOSURE AGREEMENT (CDA)	57
MATERIAL TRANSFER AGREEMENT (MTA)	58
ASSIGNMENT DEED	58
LICENSE AGREEMENT.....	58
CO-DEVELOPMENT AND CO-MARKETING AGREEMENTS	58
FACTORS FOR A SUCCESSFUL PROJECT	59
FACTORS FOR A SUCCESSFUL PROJECT (CONTINUED).....	60
CHAPTER ELEVEN: NEW DEVELOPMENTS	61
QUINTILES INC.	61
COVANCE.....	62
CHARLES RIVER LABORATORIES	63
OTHERS	63
OTHERS (CONTINUED)	64
OTHERS (CONTINUED)	65
CHAPTER TWELVE: MARKETS.....	66

CONTRACT MANUFACTURING	66
CONTRACT MANUFACTURE OF BULK DRUGS/APIS	66
Market Overview	66
Market Overview (Continued).....	67
Market Revenue	68
<i>TABLE 12 WORLDWIDE BULK DRUG/API CONTRACT</i>	
<i>MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$</i>	
<i>BILLIONS)</i>	68
<i>FIGURE 8 WORLDWIDE BULK DRUG/API CONTRACT</i>	
<i>MANUFACTURING REVENUE BY REGION, 2007-2014 (\$</i>	
<i>BILLIONS)</i>	69
Market Shares	69
<i>TABLE 13 WORLDWIDE BULK DRUG/API CONTRACT</i>	
<i>MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	70
<i>FIGURE 9 WORLDWIDE BULK DRUG/API CONTRACT</i>	
<i>MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	70
CONTRACT MANUFACTURE OF ORAL DOSAGE	
FORMULATIONS.....	70
Solid Dosage Formulations	71
Market Overview	71
Market Revenue.....	72
<i>TABLE 14 WORLDWIDE SOLID DOSAGE FORM CONTRACT</i>	
<i>MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$</i>	
<i>BILLIONS)</i>	73
<i>FIGURE 10 WORLDWIDE SOLID DOSAGE FORM CONTRACT</i>	
<i>MANUFACTURING REVENUE BY REGION, 2007-2014 (\$</i>	
<i>BILLIONS)</i>	73
Market Shares.....	73
<i>TABLE 15 WORLDWIDE SOLID DOSAGE FORM CONTRACT</i>	
<i>MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	74
<i>FIGURE 11 WORLDWIDE SOLID DOSAGE FORM CONTRACT</i>	
<i>MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	74
Market by Formulation	75
Market Revenue.....	75
<i>TABLE 16 WORLDWIDE SOLID DOSAGE FORM CONTRACT</i>	
<i>MANUFACTURING REVENUE BY FORMULATION, THROUGH</i>	
<i>2014 (\$ BILLIONS)</i>	76
<i>FIGURE 12 WORLDWIDE SOLID DOSAGE FORM CONTRACT</i>	
<i>MANUFACTURING REVENUE BY FORMULATION, 2007-2014 (\$</i>	
<i>BILLIONS)</i>	76
<i>TABLE 17 WORLDWIDE SOLID DOSAGE FORM CONTRACT</i>	
<i>MANUFACTURING MARKET SHARES BY FORMULATION, 2009</i>	
<i>(%)</i>	77

<i>FIGURE 13 WORLDWIDE SOLID DOSAGE FORM CONTRACT MANUFACTURING, MARKET SHARES BY FORMULATION, 2009 (%)</i>	77
Liquid Dosage Formulations.....	77
Market Overview	77
Market Overview (Continued).....	78
Market Overview (Continued).....	79
Non-sterile Formulations	80
Market Revenue.....	80
<i>TABLE 18 WORLDWIDE LIQUID DOSAGE FORM (NON-STERILE) CONTRACT MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	80
<i>FIGURE 14 WORLDWIDE LIQUID DOSAGE FORM (NON-STERILE) CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ MILLIONS)</i>	81
Market Shares.....	81
<i>TABLE 19 WORLDWIDE LIQUID DOSAGE FORM (NON-STERILE) CONTRACT MANUFACTURING MARKET SHARES BY REGION, 2006 (%)</i>	81
<i>FIGURE 15 WORLDWIDE LIQUID DOSAGE FORM (NON-STERILE) CONTRACT MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	82
Sterile Formulations.....	82
Market Revenue.....	82
<i>TABLE 20 WORLDWIDE LIQUID DOSAGE FORM (STERILE) CONTRACT MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	82
<i>FIGURE 16 WORLDWIDE LIQUID DOSAGE FORM (STERILE) CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ MILLIONS)</i>	83
Market Shares.....	83
<i>TABLE 21 WORLDWIDE LIQUID DOSAGE FORM (STERILE) CONTRACT MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	83
<i>FIGURE 17 WORLDWIDE LIQUID DOSAGE FORM (STERILE) CONTRACT MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	84
Market by Formulation	84
Non-sterile Formulations	84
<i>TABLE 22 WORLDWIDE LIQUID DOSAGE FORM (NON-STERILE) CONTRACT MANUFACTURING REVENUE BY FORMULATION, THROUGH 2014 (\$ MILLIONS)</i>	85

<i>FIGURE 18 WORLDWIDE LIQUID DOSAGE FORM (NON-STERILE) CONTRACT MANUFACTURING REVENUE BY FORMULATION, 2007-2014 (\$ MILLIONS)</i>	85
<i>TABLE 23 WORLDWIDE LIQUID DOSAGE FORM (NON-STERILE) CONTRACT MANUFACTURING MARKET SHARES BY FORMULATION, 2009 (%)</i>	86
<i>FIGURE 19 WORLDWIDE LIQUID DOSAGE FORM (NON-STERILE) CONTRACT MANUFACTURING MARKET SHARES BY FORMULATION, 2009 (%)</i>	86
Sterile Formulations.....	86
<i>TABLE 24 WORLDWIDE LIQUID DOSAGE FORM (STERILE) CONTRACT MANUFACTURING REVENUE BY FORMULATION, THROUGH 2014 (\$ MILLIONS)</i>	87
<i>FIGURE 20 WORLDWIDE LIQUID DOSAGE FORM (STERILE) CONTRACT MANUFACTURING REVENUE BY FORMULATION, 2007-2014 (\$ MILLIONS)</i>	87
<i>TABLE 25 WORLDWIDE LIQUID DOSAGE FORM (STERILE) CONTRACT MANUFACTURING MARKET SHARES BY FORMULATION, 2009 (%)</i>	88
<i>FIGURE 21 WORLDWIDE LIQUID DOSAGE FORM (STERILE) CONTRACT MANUFACTURING MARKET SHARES BY FORMULATION, 2009 (%)</i>	88
CONTRACT MANUFACTURE OF SEMISOLID DOSAGE FORMULATIONS.....	88
Market Overview	88
Market Overview (Continued).....	89
Market Revenue	90
<i>TABLE 26 WORLDWIDE SEMISOLID DOSAGE FORM CONTRACT MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	90
<i>FIGURE 22 WORLDWIDE SEMISOLID DOSAGE FORM CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ MILLIONS)</i>	91
Market Shares	91
<i>TABLE 27 WORLDWIDE SEMISOLID DOSAGE FORM CONTRACT MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	91
<i>FIGURE 23 WORLDWIDE SEMI-SOLID DOSAGE FORM CONTRACT MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	92
Market by Formulation	92
<i>TABLE 28 WORLDWIDE SEMISOLID DOSAGE FORM CONTRACT MANUFACTURING REVENUE BY FORMULATION, THROUGH 2014 (\$ MILLIONS)</i>	93

<i>FIGURE 24 WORLDWIDE SEMISOLID DOSAGE FORM CONTRACT MANUFACTURING REVENUE BY FORMULATION, THROUGH 2014 (\$ MILLIONS)</i>	93
<i>TABLE 29 WORLDWIDE SEMISOLID DOSAGE FORM CONTRACT MANUFACTURING MARKET SHARES BY FORMULATION, 2009 (%)</i>	94
<i>FIGURE 25 WORLDWIDE SEMISOLID DOSAGE FORM CONTRACT MANUFACTURING MARKET SHARES BY FORMULATION, 2009 (%)</i>	94
CONTRACT MANUFACTURE OF ADVANCED DRUG DELIVERY PRODUCTS	94
Contract Manufacture ...(Continued).....	95
Market Overview	96
<i>TABLE 30 CONTRACTING COMPANIES PROVIDING DRUG DELIVERY SYSTEMS</i>	97
<i>TABLE 30 (CONTINUED)</i>	98
Market Revenue	98
<i>TABLE 31 WORLDWIDE CONTRACTING COMPANIES PROVIDING ADVANCED DRUG DELIVERY SYSTEMS REVENUE BY REGION, THROUGH 2014 (\$ BILLIONS)</i>	98
<i>FIGURE 26 WORLDWIDE ADVANCED DRUG DELIVERY SYSTEM CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ BILLIONS)</i>	99
Market Shares	99
<i>TABLE 32 WORLDWIDE DRUG DELIVERY CONTRACT MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	99
<i>FIGURE 27 WORLDWIDE DRUG DELIVERY CONTRACT MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	100
Market by Formulation	100
<i>TABLE 33 WORLDWIDE CONTRACTING COMPANIES PROVIDING ADVANCED DRUG DELIVERY SYSTEMS REVENUE BY TYPE, THROUGH 2014 (\$ BILLIONS)</i>	101
<i>FIGURE 28 WORLDWIDE ADVANCED DRUG DELIVERY SYSTEM CONTRACT MANUFACTURING REVENUE BY TYPE, 2007-2014 (\$ BILLIONS)</i>	101
Market Shares	102
<i>TABLE 34 WORLDWIDE ADVANCED DRUG DELIVERY SYSTEM CONTRACT MANUFACTURING SHARE BY TYPE, 2009 (%)</i>	102
<i>FIGURE 29 WORLDWIDE ADVANCED DRUG DELIVERY SYSTEM CONTRACT MANUFACTURING REVENUE BY TYPE, 2009 (%)</i>	103
CONTRACT MANUFACTURE OF OTC AND NUTRITIONAL PRODUCTS.....	103
Market Overview	104
Market Revenue	105

<i>TABLE 35 WORLDWIDE OTC AND NUTRITIONAL PRODUCT CONTRACT MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$ BILLIONS)</i>	106
<i>FIGURE 30 WORLDWIDE OTC AND NUTRITIONAL PRODUCTS CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ BILLIONS)</i>	106
Market Shares	107
<i>TABLE 36 WORLDWIDE OTC AND NUTRITIONAL PRODUCTS CONTRACT MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	107
<i>FIGURE 31 WORLDWIDE OTC AND NUTRITIONAL PRODUCT CONTRACT MANUFACTURING MARKET SHARES BY REGION, 2009 (%)</i>	107
Market by Formulation	108
<i>TABLE 37 WORLDWIDE OTC AND NUTRITIONAL PRODUCT CONTRACT MANUFACTURING REVENUE BY DOSAGE FORM, THROUGH 2014 (\$ BILLIONS)</i>	108
<i>FIGURE 32 WORLDWIDE OTC AND NUTRITIONAL PRODUCT CONTRACT MANUFACTURING REVENUE BY DOSAGE FORM, 2007-2014 (\$ BILLIONS)</i>	109
<i>TABLE 38 WORLDWIDE OTC AND NUTRITIONAL PRODUCT CONTRACT MANUFACTURING MARKET SHARES BY DOSAGE FORM, 2009 (%)</i>	109
<i>FIGURE 33 WORLDWIDE OTC AND NUTRITIONAL PRODUCT CONTRACT MANUFACTURING MARKET SHARES BY DOSAGE FORM, 2009 (%)</i>	110
CONTRACT RESEARCH	110
MARKET OVERVIEW	110
Partnerships	110
Partnerships (Continued)	111
Expansions of Facilities	112
MARKET REVENUE	113
<i>TABLE 39 WORLDWIDE CONTRACT PHARMACEUTICAL RESEARCH MARKET BY REGION, THROUGH 2014 (\$ BILLIONS)</i>	114
<i>FIGURE 34 WORLDWIDE CONTRACT PHARMACEUTICAL RESEARCH MARKET BY REGION, 2007-2014 (\$ BILLIONS)</i>	114
MARKET SHARES	115
<i>TABLE 40 WORLDWIDE CONTRACT RESEARCH MARKET SHARES BY REGION, 2009 (%)</i>	115
<i>FIGURE 35 WORLDWIDE CONTRACT RESEARCH MARKET SHARES BY REGION, 2009 (%)</i>	115
MARKET BY DISCIPLINE	116
<i>TABLE 41 WORLDWIDE CONTRACT RESEARCH REVENUE BY DISCIPLINE, THROUGH 2014 (\$ BILLIONS)</i>	116

<i>FIGURE 36 WORLDWIDE CONTRACT RESEARCH REVENUE BY DISCIPLINE, 2007-2014 (\$ BILLIONS)</i>	117
<i>MARKET SHARES BY DISCIPLINE</i>	117
<i>TABLE 42 WORLDWIDE CONTRACT RESEARCH MARKET SHARES BY DISCIPLINE, 2009 (%)</i>	117
<i>FIGURE 37 WORLDWIDE CONTRACT RESEARCH MARKET SHARES BY DISCIPLINE, 2009 (%)</i>	118
CONTRACT PACKAGING	118
MARKET OVERVIEW	118
Market Overview (Continued)	119
MARKET REVENUE.....	119
<i>TABLE 43 WORLDWIDE CONTRACT PACKAGING MARKET BY REGION, THROUGH 2014 (\$ BILLIONS)</i>	120
<i>FIGURE 38 WORLDWIDE CONTRACT PACKAGING MARKET BY REGION, 2007-2014 (\$ BILLIONS)</i>	120
MARKET SHARES	121
<i>TABLE 44 WORLDWIDE CONTRACT PACKAGING MARKET SHARES BY REGION, 2009 (%)</i>	121
<i>FIGURE 39 WORLDWIDE CONTRACT PACKAGING MARKET SHARES BY REGION, 2009 (%)</i>	121
MARKET BY PACKAGE TYPE	122
MARKET REVENUE.....	122
<i>TABLE 45 WORLDWIDE CONTRACT PACKAGING MARKET BY PACKAGE TYPE, THROUGH 2014 (\$ BILLIONS)</i>	123
<i>FIGURE 40 WORLDWIDE CONTRACT PACKAGING MARKET BY PACKAGE TYPE, 2007-2014 (\$ BILLIONS)</i>	123
MARKET SHARES	123
<i>TABLE 46 WORLDWIDE CONTRACT PACKAGING MARKET SHARES BY PACKAGE TYPE, 2009 (%)</i>	124
<i>FIGURE 41 WORLDWIDE CONTRACT PACKAGING MARKET SHARES BY PACKAGE TYPE, 2009 (%)</i>	124
 CHAPTER THIRTEEN: CONTRACT MANUFACTURING APPLICATIONS	125
CARDIOVASCULAR DRUG MARKET	125
MARKET REVENUE.....	126
<i>TABLE 47 WORLDWIDE REVENUE FROM CONTRACT MANUFACTURE OF CARDIOVASCULAR DRUGS BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	126
<i>FIGURE 42 WORLDWIDE CARDIOVASCULAR DRUG CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ MILLIONS)</i>	127
REPRODUCTIVE DRUG MARKET	127
MARKET REVENUE.....	128

<i>TABLE 48 WORLDWIDE REPRODUCTIVE DRUG CONTRACT MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	128
<i>FIGURE 43 WORLDWIDE REPRODUCTIVE DRUG CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ MILLIONS)</i>	129
ONCOLOGY DRUG MARKET.....	129
MARKET REVENUE.....	130
<i>TABLE 49 WORLDWIDE ONCOLOGY DRUG AND DIAGNOSTIC CONTRACT MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	131
<i>FIGURE 44 WORLDWIDE ONCOLOGY DRUG AND DIAGNOSTIC CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ MILLIONS)</i>	131
ANALGESIC MARKET	132
MARKET REVENUE.....	132
<i>TABLE 50 WORLDWIDE ANALGESIC CONTRACT MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	133
<i>FIGURE 45 WORLDWIDE ANALGESIC CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ MILLIONS)</i>	133
ANTIVIRAL DRUGS MARKET	133
MARKET REVENUE.....	134
<i>TABLE 51 WORLDWIDE ANTIVIRAL DRUG CONTRACT MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	135
<i>FIGURE 46 WORLDWIDE ANTIVIRAL DRUG CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ MILLIONS)</i>	135
ANTIBIOTICS MARKET	136
MARKET REVENUE.....	136
<i>TABLE 52 WORLDWIDE ANTIBIOTIC CONTRACT MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$ MILLIONS)</i>	137
<i>FIGURE 47 WORLDWIDE ANTIBIOTIC CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ MILLIONS)</i>	137
MARKETS FOR OTHER DRUGS.....	138
MARKET REVENUE.....	138
<i>TABLE 53 WORLDWIDE OTHER DRUG CONTRACT MANUFACTURING REVENUE BY REGION, THROUGH 2014 (\$ BILLIONS)</i>	139

<i>FIGURE 48 WORLDWIDE OTHER DRUG CONTRACT MANUFACTURING REVENUE BY REGION, 2007-2014 (\$ BILLIONS)</i>	139
CHAPTER FOURTEEN: PATENT ANALYSIS.....	140
PATENTS BY YEAR.....	140
<i>TABLE 54 NUMBER OF SIGNIFICANT PATENTS BY YEAR, 2005-2009</i>	140
<i>FIGURE 49 NUMBER OF PATENTS BY YEAR, 2005-2009</i>	140
<i>FIGURE 50 NUMBER OF PATENTS BY YEAR, 2005-2009 (%)</i>	141
PATENTS BY COMPANY.....	141
<i>TABLE 55 NUMBER OF U.S. PATENTS BY COMPANY, 2005-2009</i>	142
PATENTS BY COUNTRY.....	142
<i>TABLE 56 NUMBER OF U.S. PATENTS BY COUNTRY, 2005-2009</i>	143
<i>TABLE 57 PATENT SHARES BY COUNTRY, 2005-2009 (%)</i>	143
<i>FIGURE 51 PATENT SHARES BY COUNTRY, 2005-2009 (%)</i>	144
PATENTS BY EMPHASIS.....	144
<i>TABLE 58 PATENTS BY EMPHASIS, 2005-2009</i>	145
CHAPTER FIFTEEN: CURRENT ENVIRONMENT.....	146
OVERALL SITUATION OF THE CONTRACTING MARKET.....	146
CONTRACT MANUFACTURING OF API AND DOSAGE FORMS.....	146
CONTRACT MANUFACTURING OF OTC AND NUTRACEUTICALS.....	146
CONTRACT RESEARCH.....	147
CONTRACT PACKAGING.....	147
SUCCESS FACTORS FOR CMOS.....	147
PRESENT SCENARIO OF THE CONTRACT MANUFACTURING MARKET.....	148
FROM THE PHARMACEUTICAL COMPANIES' PERSPECTIVE.....	148
FROM CONTRACT MANUFACTURING ORGANIZATION'S PERSPECTIVE.....	149
FACTORS AFFECTING THE OUTSOURCING MARKET.....	149
COST CONTAINMENT.....	150
GLOBALIZATION.....	150
MERGERS AND ACQUISITIONS.....	150
REGULATORY REQUIREMENTS.....	151
NEED FOR SPECIALIZED SERVICES.....	151
COMPETITION WITHIN THE PHARMACEUTICAL INDUSTRY.....	151
INTRODUCTION OF NEW BIOTHERAPEUTICS.....	151
CHAPTER SIXTEEN: COMPANY PROFILES.....	152
AAI PHARMA, INC.	152

ABBOTT LABORATORIES.....	152
AEROGEN, INC.....	153
ALBANY MOLECULAR RESEARCH, INC.	153
ALCAN PACKAGING.....	154
ALKERMES, INC.	154
AMERISOURCE BERGEN	155
A. P. PHARMA, INC.	155
ARADIGM CORPORATION	156
BAXTER HEALTHCARE.....	157
BEN VENUE LABORATORIES INC.	157
BIOVAIL CORP.	158
BOEHRINGER INGELHEIM	158
BOOTS MANUFACTURING	159
CAMBREX CORP.	159
CANGENE	160
CATALENT PHARMA SOLUTIONS	160
CEDARBURG HAUSER PHARMACEUTICAL LTD.	161
CENEXI.....	161
CHARLES RIVER LABORATORIES	162
CHEMBRIDGE CORP.....	162
CONFAB LABORATORIES	163
COVANCE INC.....	163
DAVOS PHARMA.....	164
DECODE GENETICS.....	164
DIOSYNTH BIOTECHNOLOGY.....	165
DISHMAN PHARMACEUTICALS AND CHEMICALS LTD.	165
DOW CHEMICAL COMPANY.....	166
DPT LABORATORIES INC.	166
DR REDDY'S LABORATORIES	167
DSM PHARMACEUTICAL PRODUCTS	167
ELAN DRUG TECHNOLOGIES	168
EVOTEC AG.....	168
FULCRUM PHARMA PLC	169
GENZYME PHARMACEUTICALS	169
GIRINDUS AG.....	170
GLAXOSMITHKLINE BIOPHARMACEUTICALS.....	170
HOVIONE S.A.....	171
JUBILANT ORGANOSYS.....	171
KENDLE INTERNATIONAL INC.....	172
KING PHARMACEUTICALS	172
KP PHARMACEUTICAL TECHNOLOGIES INC.....	173
K.V. PHARMACEUTICAL CO.....	173
LIGAND PHARMACEUTICALS	174
LONZA GROUP	174

LYNE LABORATORIES.....	175
MALLINCKRODT	175
MDS PHARMA SERVICES.....	176
MEDAREX INC.	176
MIKART INC	177
NORWICH PHARMACEUTICALS	177
NOVAVAX, INC.....	177
OMNICARE CLINICAL RESEARCH.....	178
PAREXEL INTERNATIONAL CORPORATION	178
PATHEON INC.....	179
PERRIGO COMPANY	179
PHARMACEUTICAL PRODUCT DEVELOPMENT INC.....	180
PIRAMAL HEALTHCARE.....	180
PRA INTERNATIONAL.....	181
QUINTILES	181
RANBAXY RESEARCH LABS.....	182
REGIS TECHNOLOGIES, INC.	182
SCHWARZ PHARMA AG.....	183
SKYEPHARMA.....	183
TALECRIS BIOTHERAPEUTICS INC.	184
WUXI APP TEC.....	184
XCELLEREX, LLC	185
APPENDIX : ABBREVIATIONS	186
APPENDIX.....	186
APPENDIX (CONTINUED)	187