#### 1 Table of Contents

- 1.1 List of Tables
- 1.2 List of Figures

#### 2 Introduction

### **3 Contract Manufacturing Organizations (CMO)**

- 3.1 Process of CMO Outsourcing
- 3.2 Asia-Pacific CMO Market Drivers
- 3.2.1 Availability of Low-cost Skilled Manpower
- 3.2.2 Key Benefits of Outsourcing
- 3.3 Asia-Pacific CMO Market Revenues and Forecast to 2017

### 4 Asia-Pacific Active Pharmaceutical Ingredients Market

- 4.1 Asia-Pacific API Industry Structure
- 4.2 Asia-Pacific API Distribution Structure
- 4.3 Asia-Pacific API Market Overview
- 4.4 Asia-Pacific APIs Market Segmentation
- 4.4.1 Synthetic APIs
- 4.4.2 Biotech APIs
- 4.5 Asia-Pacific APIs Market Drivers
- 4.5.1 Growing Pharmaceutical Manufacturing Capabilities of Developing Countries Such as China and India are Attracting APIs Manufacturing from Developed Countries
- 4.5.2 Domestic Market Growth of Developing Countries in Asia-Pacific is Providing Global Pharmaceutical Industry Growth
- 4.5.3 Increasing Focus on Biotech API Drugs in Asia-Pacific will Contribute Significantly to Asia-Pacific APIs Market Growth
- 4.5.4 The Improving Regulatory Framework in Markets of China and India is Increasing the Penetration of Branded Drugs
- 4.5.5 Patent Expiries of Blockbuster Drugs Boosting the Market Revenues in Asia-Pacific
- 4.6 Asia-Pacific APIs Market Restraints
- 4.6.1 Increasing Patent Expiries Hamper the Growth of the Branded API Market
- 4.6.2 Highly Fragmented Market Restricts the Revenue Growth of the Asia-Pacific API Market
- 4.6.3 Limited Improvement in Pharmaceutical Manufacturing Capabilities may Hamper Overall Growth Potential
- 4.6.4 High Currency Fluctuations Hamper the Value Growth of the Pharmaceutical Market in the Asia-Pacific Region
- 4.7 Asia-Pacific APIs Market Revenue and Forecasts to 2017
- 4.8 Asia-Pacific Revenue Share Analysis by Product Types
- 4.9 Asia-Pacific Synthetic APIs Market
- 4.9.1 Asia-Pacific Synthetic APIs Market Drivers
- 4.9.2 Asia-Pacific Synthetic APIs Market Restraints
- 4.9.3 Asia-Pacific Synthetic Market Revenues and Forecast to 2017
- 4.9.4 Asia-Pacific Synthetic Market Revenue Share Analysis by Consumer Base
- 4.9.5 Asia-Pacific Synthetic Market Revenues by Customer Base and Forecast to 2017
- 4.10 Asia-Pacific Biotech APIs Market
- 4.10.1 Asia-Pacific Biotech APIs Market Drivers

- 4.10.2 Asia-Pacific Biotech APIs Market Restraints
- 4.10.3 Asia-Pacific Biotech Market Revenues and Forecasts to 2017
- 4.10.4 Asia-Pacific Biotech Market Revenue Share Analysis by Customer Base
- 4.10.5 Asia-Pacific Biotech Market Revenue by Customer Base and Forecast to 2017
- 4.11 Asia-Pacific Patent Expiry of Leading Biologics
- 4.12 Asia-Pacific APIs Market Share Analysis by Therapeutic Applications

# **5 Japan Active Pharmaceutical Ingredients Market**

- 5.1 Japan APIs Market Overview
- 5.2 Japan APIs Market Revenue and Forecasts to 2017
- 5.3 Japan APIs Market Revenue Share Analysis by Product Type
- 5.4 Japan APIs Market by Customer Base
- 5.4.1 Japan Synthetic Market Revenue by Customer Base and Forecasts to 2017
- 5.4.2 Japan Synthetic Market Revenue Share Analysis by Customer Base
- 5.4.3 Japan Biotech Market Revenue by Customer Base and Forecasts to 2017
- 5.4.4 Japan Biotech Market Revenue Share Analysis by Customer Base
- 5.5 Japan APIs Market Share Analysis by Therapeutic Applications

## 6 China Active Pharmaceutical Ingredients Market

- 6.1 China APIs Market Overview
- 6.2 China API Market Revenues by Product Type and Forecasts to 2017
- 6.3 China APIs Market Revenue Share Analysis by Product Types
- 6.4 China APIs Market by Customer Base
- 6.4.1 China Synthetic Market Revenue by Customer Base and Forecasts to 2017
- 6.4.2 China Synthetic Market Revenue Share Analysis by Customer Base
- 6.4.3 China Biotech Market Revenue by Customer Base and Forecast to 2017
- 6.4.4 China Biotech Market Revenue Share Analysis by Customer Base
- 6.5 China APIs Market Share Analysis by Therapeutic Applications

### 7 South Korea Active Pharmaceutical Ingredients Market

- 7.1 South Korea APIs Market Overview
- 7.2 South Korea APIs Market Revenue and Forecasts to 2017
- 7.3 South Korea APIs Market Revenue Share Analysis by Product Type
- 7.4 South Korea APIs Market by Customer Base
- 7.4.1 South Korea Synthetic Market Revenue by Customer Base and Forecasts to 2017
- 7.4.2 South Korea Synthetic Market Revenue Share Analysis by Customer Base
- 7.4.3 South Korea Biotech Market Revenue by Customer Base and Forecasts to 2017
- 7.4.4 South Korea Biotech Market Revenue Share Analysis by Customer Base
- 7.5 South Korea APIs Market Share Analysis by Therapeutic Applications

### **8 India Active Pharmaceutical Ingredients Market**

- 8.1 India APIs Market Overview
- 8.2 India APIs Market Revenue and Forecasts to 2017
- 8.3 India APIs Market Revenue Share Analysis by Product Types
- 8.4 India APIs Market by Customer Base
- 8.4.1 India Synthetic Market Revenue by Customer Base and Forecasts to 2017
- 8.4.2 India Synthetic Market Revenue Share Analysis by Customer Base
- 8.4.3 India Biotech Market Revenue by Customer Base and Forecasts to 2017
- 8.4.4 India Biotech Market Revenue Share Analysis by Customer Base
- 8.5 India APIs Market Revenue Analysis by Therapeutic Applications

## 9 Appendix

- 9.1 Abbreviations
- 9.2 Bibliography
- 9.3 Market Definitions
- 9.4 Methodology
- 9.4.1 Coverage
- 9.4.2 Secondary Research
- 9.4.3 Primary Research
- 9.4.4 Expert Panel Validation
- 9.5 Contact Us
- 9.6 Disclaimer

#### 1.1 List of Tables

Table 1: CMO Market, Asia-Pacific, Fine Chemical Industry Labor Cost,

\$/Operator/Year, 2011

Table 2: CMO Market, Asia-Pacific, Revenues, \$m, 2005-2017

Table 3: APIs Market, Asia-Pacific, Market Revenues, \$m, 2005-2017

Table 4: APIs Market, Asia-Pacific, Revenue Share by Product Types, \$m and %, 2011

Table 5: Synthetic Market, Asia-Pacific, Market Revenues, \$m, 2005-2017

Table 6: Synthetic Market, Asia-Pacific, Revenue Share Analysis by Countries, \$m and %, 2011

Table 7: Synthetic Market, Asia-Pacific, Revenue Analysis by Countries (\$m), 2005, 2011 and 2017

Table 8: Synthetic Market, Asia-Pacific, Revenue Share by Customer Base, %, 2011

Table 9: Synthetic Market, Asia-Pacific, Market Revenues by Product Types, \$m, 2005-2017

Table 10: Biotech Market, Asia-Pacific, Market Revenues, \$m, 2005-2017

Table 11: Biotech Market, Asia-Pacific, Revenue Share Analysis by Countries, \$m and %, 2011

Table 12: Biotech Market, Asia-Pacific, Revenue Share Analysis by Countries, \$m, 2005, 2011 and 2017

Table 13: Biotech Market, Asia-Pacific, Revenue Share Analysis by Customer Base, \$m and %, 2011

Table 14: Biotech Market, Asia-Pacific, Market Revenues by Product Type, \$m, 2005-2017

Table 15: Biotech Market, Asia-Pacific, Key Patent Expiries, 2004-2018

Table 16: APIs Market, Asia-Pacific, Revenue Share Analysis by Therapeutic Applications, %, 2011 and 2017

Table 17: APIs Market, Japan, Market Revenues by Product Types, \$m, 2005-2017

Table 18: APIs Market, Japan, Revenue Share Analysis by Product Types, %, 2005, 2011 and 2017

Table 19: Synthetic Market, Japan, Market Revenues by Customer Base, \$m, 2005-2017

Table 20: Synthetic Market, Japan, Revenue Share by Customer Base, %, 2005, 2011 and 2017

Table 21: Biotech Market, Japan, Market Revenues by Customer Base, \$m, 2005-2017

Table 22: Biotech Market, Japan, Revenue Share Analysis by Customer Base, %, 2005, 2011 and 2017

- Table 23: APIs Market, Japan, Revenue Share Analysis by Therapeutic Applications, %, 2011-2017
- Table 24: APIs Market, China, Market Revenues by Product Type, \$m, 2005-2017
- Table 25: APIs Market, China, Revenue Share Analysis by Product Type, %, 2005, 2011 and 2017
- Table 26: Synthetic Market, China, Market Revenues by Customer Base, \$m, 2005-2017
- Table 27: Synthetic Market, China, Revenue Share Analysis by Customer Base, %, 2005-2017
- Table 28: Biotech Market, China, Market Revenues by Customer Base, \$m, 2005-2017
- Table 29: Biotech Market, China, Revenue Share Analysis by Customer Base, %, 2005, 2011 and 2017
- Table 30: APIs Market, China, Revenue Share Analysis by Therapeutic Applications, %, 2011 and 2017
- Table 31: APIs Market, South Korea, Market Revenues by Product Types, \$m, 2005-2017
- Table 32: APIs Market, South Korea, Revenue Share Analysis by Product Types, %, 2005, 2011 and 2017
- Table 33: Synthetic Market, South Korea, Market Revenues by Customer Base, \$m, 2005-2017
- Table 34: Synthetic Market, South Korea, Revenue Share Analysis by Customer Base, %, 2005, 2011 and 2017
- Table 35: Biotech Market, South Korea, Market Revenues by Customer Base, \$m, 2005-2017
- Table 36: Biotech Market, South Korea, Revenue Share Analysis by Customer Base, %, 2005, 2011 and 2017
- Table 37: APIs Market, South Korea, Revenue Share Analysis by Therapeutic Applications, %, 2011 and 2017
- Table 38: APIs Market, India, Market Revenues by Product Types, \$m, 2005-2017
- Table 39: APIs Market, India, Revenue Share Analysis by Product Types, %, 2005, 2011 and 2017
- Table 40: Synthetic Market, India, Market Revenues by Customer Base, \$m, 2005-2017
- Table 41: Synthetic Market, India, Revenue Share Analysis by Customer Base, %, 2005, 2011 and 2017
- Table 42: Biotech Market, India, Market Revenues by Customer Base, \$m, 2005-2017
- Table 43: Biotech Market, India, Revenue Share Analysis by Customer Base, %, 2005, 2011 and 2017
- Table 44: APIs Market, India, Revenue Share Analysis by Therapeutic Applications, %, 2011 and 2017

#### 1.2 List of Figures

- Figure 1: CMO Market, Global, CMO Process Selection and Outsourcing Project Management
- Figure 2: CMO Market, Asia-Pacific, Fine Chemical Industry Labor Cost (\$/Operator/Year), 2011
- Figure 3: CMO Market, Key Benefits of CMO Outsourcing
- Figure 4: CMO Market, Asia-Pacific, Revenue Forecasts (\$m), 2005-2017
- Figure 5: APIs Market, Asia-Pacific, Industry Value Chain

- Figure 6: APIs Market, Asia-Pacific, Distribution Structure
- Figure 7: APIs Market, Asia-Pacific, Product Types
- Figure 8: APIs Market, Asia-Pacific, Market Revenues (\$m), 2005-2017
- Figure 9: APIs Market, Asia-Pacific, Revenue Share by Product Types (%), 2011
- Figure 10: Synthetic Market, Asia-Pacific, Market Revenues (\$m), 2005-2017
- Figure 11: Synthetic Market, Asia-Pacific, Revenue Share Analysis by Countries (%), 2011
- Figure 12: Synthetic Market, Asia-Pacific, Performance and Potential Analysis Grid, 2005-2017
- Figure 13: Synthetic Market, Asia-Pacific, Revenue Analysis by Countries (%), 2005, 2011 and 2017
- Figure 14: Synthetic Market, Asia-Pacific, Revenue Share by Customer Base (%), 2011
- Figure 15: Synthetic Market, Asia-Pacific, Revenue Trend Analysis by Product Types (\$m), 2005-2017
- Figure 16: Biotech Market, Asia-Pacific, Market Revenues (\$m and %), 2005-2017
- Figure 17: Biotech Market, Asia-Pacific, Revenue Share Analysis by Countries (%), 2011
- Figure 18: Biotech Market, Asia-Pacific, Performance and Potential Analysis Grid, 2005-2017
- Figure 19: Biotech Market, Asia-Pacific, Revenue Share Analysis by Countries (\$m), 2005, 2011 and 2017
- Figure 20: Biotech Market, Asia-Pacific, Revenue Share Analysis by Customer Base (%), 2011
- Figure 21: Biotech Market, Asia-Pacific, Market Revenues by Product Type (\$m), 2005-2017
- Figure 22: APIs Market, Asia-Pacific, Revenue Share Analysis by Therapeutic Applications (%), 2011 and 2017
- Figure 23: APIs Market, Japan, Market Revenues by Product Types (\$m), 2005-2017
- Figure 24: APIs Market, Japan, Revenue Share Analysis by Product Types (%), 2005, 2011 and 2017
- Figure 25: Synthetic Market, Japan, Market Revenues by Customer Base (\$m), 2005-2017
- Figure 26: Synthetic Market, Japan, Revenue Share by Customer Base (%), 2005, 2011 and 2017
- Figure 27: Biotech Market, Japan, Market Revenues by Customer Base (\$m), 2005-2017
- Figure 28: Biotech Market, Japan, Revenue Share Analysis by Customer Base (%), 2005, 2011 and 2017
- Figure 29: APIs Market, Japan, Revenue Share Analysis by Therapeutic Applications (%), 2011-2017
- Figure 30: APIs Market, China, Market Revenues by Product Type (\$m), 2005-2017
- Figure 31: APIs Market, China, Revenue Share Analysis by Product Type (%), 2005, 2011 and 2017
- Figure 32: Synthetic Market, China, Market Revenues by Customer Base (\$m), 2005-2017
- Figure 33: Synthetic Market, China, Revenue Share Analysis by Customer Base (%), 2005-2017
- Figure 34: Biotech Market, China, Market Revenues by Customer Base (\$m), 2005-2017

Figure 35: Biotech Market, China, Revenue Share Analysis by Customer Base (%), 2005, 2011 and 2017

Figure 36: APIs Market, China, Revenue Share Analysis by Therapeutic Applications (%), 2011 and 2017

Figure 37: APIs Market, South Korea, Market Revenues by Product Types (\$m), 2005-2017

Figure 38: APIs Market, South Korea, Revenues Share Analysis by Product Types (%), 2005, 2011 and 2017

Figure 39: Synthetic Market, South Korea, Market Revenues by Customer Base (\$m), 2005-2017

Figure 40: Synthetic Market, South Korea, Revenue Share Analysis by Customer Base (%), 2005, 2011 and 2017

Figure 41: Biotech Market, South Korea, Market Revenues by Customer Base (\$m), 2005-2017

Figure 42: Biotech Market, South Korea, Revenue Share Analysis by Customer Base (%), 2005, 2011 and 2017

Figure 43: APIs Market, South Korea, Revenue Share Analysis by Therapeutic Applications (%), 2011 and 2017

Figure 44: APIs Market, India, Market Revenues by Product Types (\$m), 2005-2017

Figure 45: APIs Market, India, Revenue Share Analysis by Product Types (%), 2005, 2011 and 2017

Figure 46: Synthetic Market, India, Market Revenues by Customer Base (\$m), 2005-2017 Figure 47: Synthetic Market, India, Revenue Share Analysis by Customer Base (%), 2005, 2011 and 2017

Figure 48: Biotech Market, India, Market Revenues by Customer Base (\$m), 2005-2017 Figure 49: Biotech Market, India, Revenue Share Analysis by Customer Base (%), 2005, 2011 and 2017

Figure 50: APIs Market, India, Revenue Share Analysis by Therapeutic Applications (%), 2011 and 2017