



Pharmaceutical contract manufacturing and API sourcing in Central and Eastern Europe 2009

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A word from the experts



„Up until the 1990s big pharma companies competed by investing large amounts of money in their production facilities and focused on in-house production. Due to overinvestment they maintained a surplus of manufacturing capacity. Other serious problems such as the drying up of R&D pipelines, regulatory hurdles which delay new approvals and losing patent protection on many of their blockbuster products have forced manufacturers to sell their production plants and reduce their workforces. As a consequence of these problems - made worse by the global financial crisis - big pharma companies are tapping into the global contract manufacturing market more and more often, including the CEE area analysed in the report. In the publication we examine the potential of the region in

the contract manufacturing of finished dosage forms as well as API sourcing in order to show the most interesting companies and subregions”.

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Global manufacturers focus on production outsourcing more and more often.

Report description

Pharmaceutical contract manufacturing and API sourcing in Central and Eastern Europe 2009 provides a valuable guide to the most attractive options for contract manufacturing of finished dose pharmaceutical products or sourcing API substances across the CEE region. The report lists and describes approximately **160 companies from 14 CEE countries** currently handling manufacturing outsourcing contracts by country and location.

The report features an in depth analysis of **drivers and resistors of the CEE market for contract pharmaceutical products manufacturing and API sourcing**, identifying and enumerating its strengths, weaknesses, opportunities and threats to success, providing a solid informational basis for businesses engaged in strategic planning that may potentially involve outsourced operations. Key drivers and resistors of contract manufacturing in each CEE country are identified along with currently visible trends and those forecast to emerge over the coming years.

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Key sections

Section One provides a general yet comprehensive **overview of contract manufacturing and API sourcing**, as it exists within the borders of the **CEE region**. It begins with a thorough analysis of the region as a whole, and proceeds to identify the countries that offer the most promising conditions. The key drivers and resistors at work in the CEE market for contract manufacturing of pharmaceutical products are identified within the context of Central and Eastern Europe.

The region itself is also compared to other competitive areas such as the Far East, where contract manufacturing and API production represents a substantial part of the market sector, or Western Europe.

Section Two contains **profiles of the contract manufacturing sectors for participating CEE countries, including: the Czech Republic, Poland, Russia, Ukraine, Hungary, Romania, Bulgaria, and other CEE countries: in total 14 countries**. Details pertinent to contract manufacturing in each country are provided, from key market drivers and resistors, API, chemical and biological drug manufacturing opportunities, and existing and future trends of significant market influence. This section also offers **detailed profiles of the most interesting contract manufacturing companies in each country** as well as those offering active pharmaceutical ingredients and other raw materials. Product details (produced within contract manufacturing), industry and government certificates, additional contract services, financial information etc. are revealed within the text of this concise and valuable document.

Section Three focuses on recent **regulatory changes** that have affected the contract manufacturing and manufacture of API within the CEE as well as those expected to influence the industry in future.

The Czech Republic might be characterised as one of the most competitive economies in CEE.

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Many companies specialise in the production of dietary supplements under contract in Poland.

Report overview

Pharmaceutical contract manufacturing and API sourcing in Central and Eastern Europe 2009 provides a comprehensive overview of the current pharmaceutical contract manufacturing and API market in the region, including:

- enumeration of key market drivers and resistors
- designations of the countries offering the best opportunities and conditions for success in pharmaceutical contract manufacturing
- comparison to other competitive regions in the global economy that offer extensive contract manufacturing opportunities for pharmaceutical outsourcing.

Countries within the CEE (the Czech Republic, Poland, Russia, Ukraine, Hungary, Romania, Bulgaria and others) differ in the conditions and opportunities that they offer to industry participants. This report provides the following information as it applies to each country:

- key market drivers and resistors
- outlooks for finished dosage forms and active pharmaceutical ingredients
- current industry trends
- profiles of companies engaged in pharmaceutical outsourcing production and manufacture of API, with emphasis on experience and specialisation, while including contact, detailed offer and financial information.

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Pharmaceutical contract manufacturing and API sourcing in Central and Eastern Europe 2009 is a useful tool for:

- pharmaceutical companies which consider to start sourcing in CEE countries or outsourcing its production in the CEE region
- pharmaceutical companies which currently cooperate with CEE based contract manufacturers of finished forms of drugs or APIs
- contract manufacturing organisations from CEE and other regions
- consulting and research companies and analytical institutes
- government agencies, embassies and other trade organizations.

Bulgaria, Serbia, Slovakia, Russia and Romania mainly use their low-cost or natural resources.

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