Oral Thin Films Market, 2015 - 2025

Description:
Oral drug delivery technologies form an integral part of the pharmaceutical industry. From the conventional tablets / capsules to modern-day fast disintegrating and rapidly acting tablets / films, the market has come a long way. Lower bioavailability of oral solid drugs, inconvenience of administering injections, inaccurate dosing by liquid formulations have turned the focus of pharmaceutical companies to develop novel oral dosage forms that eliminate several known limitations. In addition, dysphagia, a common problem due to difficulty in swallowing in people of all ages, especially paediatric, geriatric, psychiatric, uncooperative and nauseated patients, has led to increase in demand of an alternative dosage form that provides rapid dissolution without the need of water and rapid onset of action when delivered through oral mucosa.

Oral thin films are able to meet most of these challenges. The concept isn't new and several over-the-counter oral thin films are readily available. Good acceptance from the users and an increasing demand of over-the-counter oral film products has led to the development of prescription drugs into oral thin films. These films not only offer a range of benefits to specific patient population segments but also provide a number of additional benefits to other stakeholders in the industry. The emerging area has gained attention from both established and start-up pharmaceutical firms.

Companies are utilizing their oral thin film technologies to develop different types of oral thin films (e.g. oral dispersible, sublingual, buccal). In addition to the drugs, several hormones and vaccines are also being formulated into oral thin films with the aim of providing improved patient compliance. Some of the key players in this area include MonoSol Rx, Applied Pharma Research/ Labtec GmbH, BioDelivery Sciences and NAL Pharma. Many companies are collaborating with these technology providers and utilizing oral thin films as a life cycle management tool for their branded drugs that have lost patent in other dosage forms.

There are not many prescription oral thin films currently available in the market; however, the pipeline holds a wider promise. Despite the uncertainties related to the development, approval and penetration rate, the market is likely to witness stable growth in the coming decade.

The ‘Oral Thin Films’ market report provides a comprehensive analysis of the current state of the market and the likely future evolution over the next ten years. Starting with the basic introduction to the oral transmucosal route, its advantages and disadvantages, the report lays emphasis on the unmet needs fulfilled by oral thin films. Although oral thin films have been available in the forms of breath freshening strips, vitamin strips and other over-the-counter products for the past few decades, pharmaceutical companies have recently directed their focus towards formulating prescription products into oral thin films.

The study includes all prescription oral thin films, not necessarily delivered through oral mucosa. For these products, we have provided detailed profiles, underlying technologies being used to develop them and information on the key companies leading the efforts. We have also provided a detailed view on the key drivers behind the growth of this market, likely challenges and upcoming threats under the SWOT framework.

Many patients primarily paediatric, geriatric and dysphasia find it difficult to swallow traditional tablets and capsules. Moreover, some diseases require rapid onset of action. This is possible through injections; some patients, though, find it inconvenient and painful to administer injections. Oral thin films provide the best alternative dosage form for administering drug for such patients. It is important to highlight that not many prescription oral thin film products are commercially available yet. Several companies are developing innovative technologies to formulate oral thin films, which provide the advantage of rapid dissolution without the need of water and rapid onset of action when delivered through mucosa.

Given the specific advantages offered by these films and their ability to overcome the current unmet needs, the future holds significant potential. In fact, one of the primary objectives of this report is to estimate size of this future promise offered by marketed oral thin films and those currently under development. We have identified the sales potential of various oral thin films for the period 2015 - 2025. Owing to the uncertain nature of this market, we have presented three scenarios for our market forecast; these scenarios represent different growth tracks of the industry likely to be influenced by variable adoption, pricing and the evolving competitive landscape.
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