

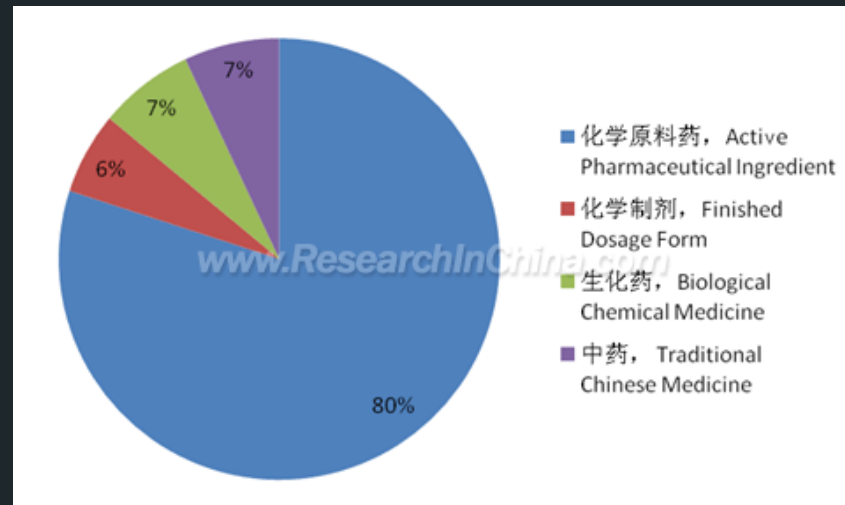
China Chemical Pharmaceutical Industry Report, 2009-2010



China's chemical pharmaceutical industry has maintained a good momentum of growth in recent years. In 2009, the number of chemical pharmaceutical manufacturers reached 2,434, up 7.5% year-on-year; the total value of industrial output achieved RMB420.7 billion, rising 10.9% year-on-year; and the pharmaceutical operating income reached RMB424.3 billion, a year-on-year increase of 19.5%.

Regarding the product structure, China is a big producer of active pharmaceutical ingredients (API). As of August 2010, China had had 1,197 active pharmaceutical ingredient manufacturers, been capable of producing over 1,500 categories of active pharmaceutical ingredients, and ranked No.1 in the world in terms of the output of penicillin, vitamins and antipyretics & analgesics. Furthermore, China is also the world's biggest exporter of active pharmaceutical ingredients, with the export volume approximating half of the domestic output of active ingredients. From the perspective of export value, active pharmaceutical ingredient accounted for 80% of China's total pharmaceutical export value in 2009; finished dosage form mainly addresses domestic demand, and only covered 6% of China's total pharmaceutical export value in 2009.

China's Pharmaceutical Export by Value, 2009



Source: General Administration of Customs, ResearchInChina

China has many chemical pharmaceutical manufacturers, and the whole industry features a low concentration rate in general. However, the segmented markets have a higher concentration rate affected by technology, raw materials source, policy and large R&D investment of chemical pharmaceutical industry. For example, China Pharmaceutical Group Limited, Shandong Luwei Pharmaceutical Co., Ltd., Northeast Pharmaceutical Group Co., Ltd. and North China Pharmaceutical Group Corp. totally held over 90% shares in the domestic vitamin market, while Zhejiang Medicine Co., Ltd. alone covered 50% shares of the global vitamin H market in 2009.

Based on the abundant statistics, the report not only underlines the overall operation including the current development, profitability, import & export and competitive layout of China's chemical pharmaceutical industry and its sub-sectors, but also makes an in-depth analysis of the operation and development advantages of China's ten leading active pharmaceutical ingredient manufacturers and ten finished dosage form companies.

Northeast Pharmaceutical Group Co., Ltd., Zhejiang Medicine Co., Ltd. and Zhejiang NHU Co., Ltd. are China's major vitamin manufacturers, as well as the key vitamin suppliers in the world. In the meantime, they are also actively expanding to produce other categories of active pharmaceutical ingredients.

North China Pharmaceutical Group Corp (NCPC) and Shandong Xinhua Pharmaceutical Company Limited (Xinhua Pharm) are China's important antibiotic production bases. NCPC tops in China in terms of penicillin capacity and output, but is transferring to cephalosporin antibiotics under the mounting pressure of overcapacity; Xinhua Pharm is the biggest antipyretics and analgesics producer and exporter in Asia.

Zhejiang Hisun Pharmaceutical Co., Ltd. (Hisun Pharma) and Zhejiang Huahai Pharmaceutical Co., Ltd. (Huahai Pharma) are the most competitive producers of special active pharmaceutical ingredients in China, both specializing in the R&D and production of chemical pharmaceuticals in the fields like anti-cancer, cardiovascular and nerve center. Moreover, the two companies both maintain a close cooperation with foreign pharmaceutical giants. Hisun Pharma cooperates with Eli Lilly and Schering-Plough in R&D and outsourcing, while Huahai Pharma supplies special active pharmaceutical ingredients and manufactures some finished dosage forms for German Boehringer Ingelheim GmbH and Swiss NOVARTIS.

Shenzhen Hepalink Pharmaceutical Co., Ltd is the world's largest producer and seller as well as China's only U.S. FDA and EU CEP– certified producer of heparin sodium active pharmaceutical ingredients. It occupied 26.7% of the worldwide sales volume of heparin sodium of 23.6 trillion units in 2009. Tianjin Tianyao Pharmaceutical Co., Ltd. and Zhejiang Xianju Pharmaceutical Co., Ltd. are the world's major cortical hormone active pharmaceutical ingredients suppliers, monopolizing the mainland Chinese dexamethasone market in the ratio of 7:3.

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