China Heparin Industry Report

◆ Analyzes the international operating environment of China heparin industry, the status quo and competition pattern of Chinese heparin API and heparin drug market;

◆ Elaborates the operation and development prospect of relatively competitive Chinese manufacturers of heparin API and/or preparations.

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Abstract

Although it is with rich source of heparin raw materials, China lags behind in the manufacturing technologies for heparin drugs. Chinese heparin industry presents mainly the exportation of heparin API (Active Pharmaceutical Ingredients) and the importation of heparin drugs.

In 2009, China’s heparin API export volume reached 13.4 trillion units, accounting for 47.5% of the world’s total heparin API supply. The overseas markets of China heparin and its salt and the exporting enterprises are relatively concentrated in distribution. During the period from January to October of 2010, the top five export destinations of China’s heparin and its salt were France, Germany, the USA, Austria and Italy, altogether taking 88% of China’s heparin API export value in the same period. In H1 2010, the top four Chinese exporting enterprises of heparin and its salt include Shenzhen Hepalink Pharmaceutical Co., Ltd, Changzhou Qianhong Bio-Pharma Co., Ltd, Nanjing King-Friend Biochemical Pharmaceutical Co., Ltd, and Yantai Dongcheng Biochemicals Co., Ltd, with a share of 79% in all of China’s heparin API export value in the same period.

Source: ResearchInChina
Heparin drugs, the downstream products of heparin API, are essential antithrombotic drugs. With the explosive population of cardio-cerebrovascular sufferers in China, the market share of heparin drugs keeps increasing year by year. Taking low-molecular weight heparin preparation with a 87.4% share of China’s heparin drugs market (2009) for example, the market size grew at an annual rate of 18% between 2006 and 2009. And in 2009, it touched RMB 1.11 billion.

Yet, Chinese market of heparin drugs, in particular the market of low-molecular weight heparin, is dominated by foreign brands on account of technology barriers although China is the world’s key supplier of heparin sodium API.

In terms of low-molecular heparin sodium market, the four foreign brands including France-based Sanofi, America-based Pfizer Pharmaceuticals and Abbott Laboratories, Italy-based ALFA WASSERMANN took a sizable lead of 83.8% market share in 2009. In particular, France-based Sanofi, whose market share accounted for 54.5%, continued to rank the first place. But among the domestic enterprises, Shandong QILU Pharmaceutical takes the lead with the market share no more than 7.4%. In low-molecular heparin calcium market, GlaxoSmithKline topped the list in 2009 with the market share of 59%, far ahead of China-based Hebei Changshan Biochemical Pharmaceutical, runner-up with the market share of 12%.

Source: Medical Economic News; ResearchInChina
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