

China Heparin Industry Report, 2010

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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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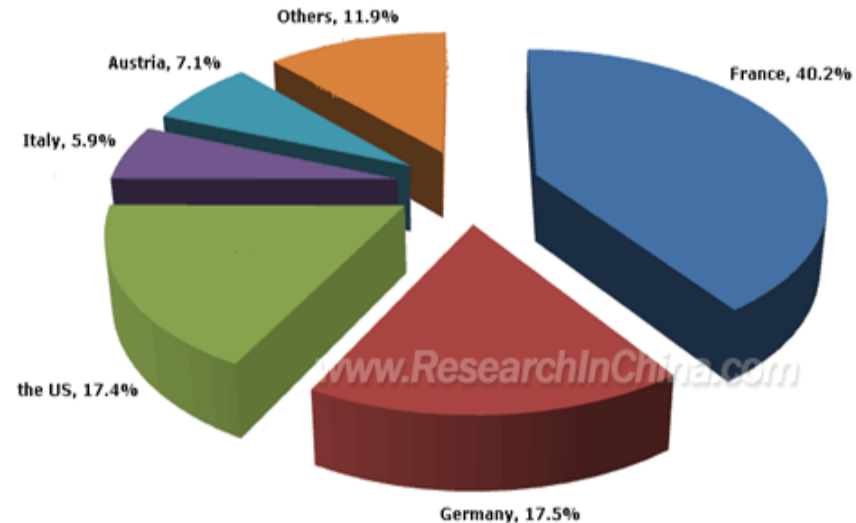
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Abstract

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 herparin API export value in the same period.

Export Destinations of China Heparin and Its Salt, Jan.-Oct., 2010 (by Value)



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.

China Low-Molecular-Weight Heparin Drug Market Size, 2006-2009 (Unit: RMB100M)



Source: Medical Economic News; ResearchInChina

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%.

1 Profile of Heparin Industry

- 1.1 Definition & Classification
- 1.2 Industry Chain

2 International Operating Environment of Heparin Industry

- 2.1 Demand of Heparin Medicine
- 2.2 Distribution of Heparin Medicine Demand
- 2.3 Heparin API Demand
- 2.4 Overseas Competitors
 - 2.4.1 Organon
 - 2.4.2 SPL
 - 2.4.3 Sanofi-Aventis
 - 2.4.4 GlaxoSmithKline
 - 2.4.5 Pfizer Pharmaceuticals Limited
- 2.5 Related Policy
- 2.6 Market Forecast

3 Current Development of China Heparin API Industry

- 3.1 Market Overview
- 3.2 Demand & Supply
- 3.3 Competition Pattern
- 3.4 Dynamics
- 3.5 Related Policy
- 3.6 Market Forecast

4 Current Development of China Heparin Preparation Industry

- 4.1 Overview of Antithrombotic Drugs
- 4.2 Market Overview
- 4.3 Demand & Supply

- 4.4 Competition Pattern
- 4.5 Dynamics & Patents
- 4.6 Market Forecast

5 China's Import & Export of Heparin

- 5.1 Exporting Trade
 - 5.1.1 Export Quantity and Prices
 - 5.1.2 Export Destinations
 - 5.1.3 Chinese Exporting Enterprises
- 5.2 Import Trade

6 Heparin Manufacturers in China

- 6.1 Shenzhen Hepalink Pharmaceutical
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Dynamics
- 6.2 Changzhou Qianhong Bio-Pharma
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Dynamics
- 6.3 Nanjing King-Friend Biochemical Pharmaceutical
 - 6.3.1 Profile
 - 6.3.2 Operation
- 6.4 Yantai Dongcheng Biochemicals
 - 6.4.1 Profile
 - 6.4.2 Operation
- 6.5 Tianjin Chase Sun Pharmaceutical
- 6.6 Hebei Changshan Biochemical Pharmaceutical
- 6.7 Wanbang Biopharmaceuticals

- Heparin Industry Chain
- Sales of Heparin Drugs Worldwide, 2003-2012E
- Distribution of Heparin Drug Consumption Worldwide, 2009
- Distribution of Heparin API Demand Worldwide, 2009
- Heparin Sodium Operating Income and Growth of Sanofi-Aventis, 2007-2009
- Forecast of Global Heparin Drug Market Development
- Heparin API Export Scale of China and Its Percentage in the World Total, 2009
- Number of Slaughtered Fattened Hogs (Head) and Year-end Number of Hogs (Head) of China, 2003-2009
- Price Trend of Crude Sodium Heparin in China, 2007-2009
- World's Major Manufacturers of Heparin Sodium API, Jan.-Sep., 2009
- Heparin Sodium API Supply in China and the World and China's Share, 2011-2012
- China Antithrombotic Drug Market Size and Growth Rate, 2003-2009
- Distribution of Three Major Categories of Antithrombotic Drugs in China, Mar., 2009
- Proportion of China-made Clopidogrel Sulfate and Ozagrel Products in Antithrombotic Drugs, 2005-2009
- Market Shares of Key Anticoagulant Medicines of China, Sep.2008-Sep.2009
- Proportion of Lumbrokinase Products of China in Anticoagulant Medicines, 2005-2009
- Chinese Market Scale of Heparin Preparation Products, 2009
- Proportion of Low-molecular Heparin Calcium and Low-molecular Heparin Sodium in Anticoagulant Medicines of China, 2005-2009
- Market Demand for Heparin Sodium Injection Solution in China, 2007-2012
- Competition Pattern of China Low-Molecular-Weight Heparin Sodium Market, 2009
- YoY Growth Rate for Sales of Main Competitive Enterprises of Low-molecular Weight Heparin Sodium in China, 2009
- Competition Pattern of China Low-Molecular-Weight Heparin Calcium Market, 2009
- YoY Growth Rate for Sales of Main Competitive Enterprises of Low-molecular Weight Heparin Calcium in China, 2009
- Main Patents for Low-Molecular-Weight Heparin

- China Low-Molecular-Weight Heparin Drug Market Size, 2006-2014
- Export of Key Western Medicines of China, Jan.-Jun. 2009
- China's Export Volume and Price Trend of Heparin Products, 2002-2010
- Countries to which China Heparin and Its Salt Get Exported, Jan.-Oct., 2010
- Main Chinese Exporting Enterprises of Heparin API and Their Percentages, Jan.-Sep., 2009
- Import Volume and Unit Price Trend of Heparin Products in China, 2008-2010
- Destinations of China's Heparin Product Imports, 2008-2010
- Import Origins of China Heparin Products, 2008-2010
- Heparin Sodium API Operating Income of Shenzhen Hepalink Pharmaceutical Co., Ltd., 2007-2009
- Heparin Sodium API Revenue of Shenzhen Hepalink Pharmaceutical Co., Ltd by Product, 2007-2009
- Heparin Sodium API Revenue of Shenzhen Hepalink Pharmaceutical Co., Ltd by Region, 2007-2009
- Client Distribution of Heparin Sodium API Sales of Shenzhen Hepalink Pharmaceutical Co., Ltd., 2007-2009
- Total Profit of Shenzhen Hepalink Pharmaceutical Co., Ltd., 2007-2009
- Operating Income Structure of Main Products of Changzhou Qianhong Bio-Pharma Co., Ltd, Jan.-Jun., 2010
- Sales Revenue of Heparin Sodium API and Injection Solution of Changzhou Qianhong Bio-Pharma Co., Ltd., 2007-2010
- Heparin Export Value and Percentage of Changzhou Qianhong Bio-Pharma Co., Ltd., 2007-2009
- Top Five Clients of Heparin Sodium API of Changzhou Qianhong Bio-Pharma Co., Ltd, 2009-2010
- Operating Income and Total Profit of Nanjing King-Friend Biochemical Pharmaceutical Co., Ltd, 2007-2008
- Heparin API Export of Nanjing King-Friend Biochemical Pharmaceutical Co., Ltd., Jan.-Sep., 2009
- Operating Income and Profit of Yantai Dongcheng Biochemicals Co., Ltd, 2007-2008
- Heparin API Export of Yantai Dongcheng Biochemicals Co., Ltd, Jan.-Sep., 2009
- Operating Income and Net Income of Tianjin Chase Sun Pharmaceutical Co., Ltd., 2007-2010
- Operating Income (by Product) of Tianjin Chase Sun Pharmaceutical Co., Ltd, 2009
- Heparin Calcium Sales Revenue and YoY Growth of Tianjin Chase Sun Pharmaceutical Co., Ltd, 2007-2009
- Gross Margin of Molecular Heparin Calcium of Tianjin Chase Sun Pharmaceutical Co., Ltd., 2007-2009

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