China Insulin Industry Report, 2010

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This report

- **analyzes the status, competition pattern and development direction of the insulin industry**
- **Focuses on the operation and development prospect of three foreign insulin producers including Novo Nordisk, Eli Lilly and Sanofi-Aventis as well as several large-scale domestic insulin producers, such as Jilin Tonghua Dongbao, Beijing Gan & Lee Pharmaceutical, and Jiangsu Wanbang Biopharmaceuticals**

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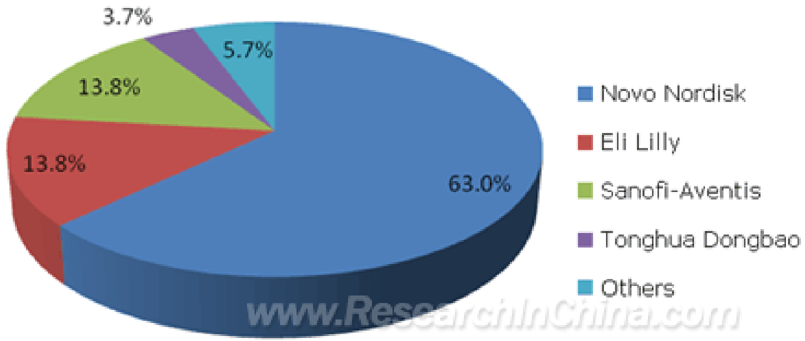
Abstract

In 2009, China's insulin market size reached up to RMB5.3 billion, but still accounted for less than 6% of the global market. China has the world's most diabetes patients, which is 92 million at present. In addition, the overall treatment rate of Chinese diabetes patients is less than 30%, and the per capita consumption of insulin is low, which is only about 0.8% of that of American patients. Therefore, China's insulin market has great potential.

The insulin industry is a high-tech industry. China's genetically engineered human insulin is still in the initial stage of industrialization, and has weak global competitiveness due to its high production cost and small production scale, which has led to the monopoly of imported insulin in China. In the first three quarters of 2010, Novo Nordisk, Eli Lilly and Sanofi-Aventis accounted for 90.6% of China's insulin market, while Tonghua Dongbao, the largest domestic company, only accounted for 3.7%. In addition, more and more enterprises are entering the Chinese insulin market, such as The United Laboratories of Hong Kong and Bayer of Germany.

Enterprises in China's Insulin Market by Market Share, Jan.-Sep.2010



Source: IMS, ResearchInChina

The report not only analyzes the status quo, competition pattern and development direction of the insulin industry as a whole and its market segments, but also makes a detailed analysis of the operation and development prospect of three foreign insulin producers including Novo Nordisk, Eli Lilly and Sanofi-Aventis as well as several large-scale domestic insulin producers.

Novo Nordisk of Denmark is an insulin industry leader in both China and the world; it accounted for 83.4% of China's recombinant human insulin market and 52.2% of China's insulin analog market in 2008.

Eli Lilly of the United States is the second pharmaceutical giant entering in China's insulin market. It accounted for 12.3% of China's recombinant human insulin market and 7.7% of China's insulin analog market in 2008; it is expanding its presence in China. It invested over USD40 million in an insulin expansion project in Suzhou in 2009.

Sanofi-Aventis of France is the world's first producer of insulin glargine analog, and accounted for 36.1% of China's insulin analog market in 2008.

Jilin Tonghua Dongbao is China's largest producer of recombinant human insulin; in 2010, its insulin API capacity was 3,000 kg and the insulin dosage form capacity was 70 million bottles in 2010.

Beijing Gan & Lee Pharmaceutical is a company controlled by Tonghua Dongbao. Gan & Lee and Sanofi Aventis are the world's only two insulin glargine analog manufacturers.

Jiangsu Wanbang Biopharmaceuticals is a leading animal insulin enterprise in China, and occupied more than 80% of China's animal insulin market in 2009. In addition, its animal insulin has been selected into the national catalog of essential drugs.

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