



China Oral Hypoglycemic Agents (OHAs) Industry Report, 2010

Feb. 2011

This report

- ◆ Analyzes the status quo and prospect of Chinese OHAS Market.
- ◆ Focuses on the market segments of OHAS , such as acarbose, metformin and so on.
- ◆ Highlights the operation and development of the local and foreign advantageous enterprises in china OHAS industry.

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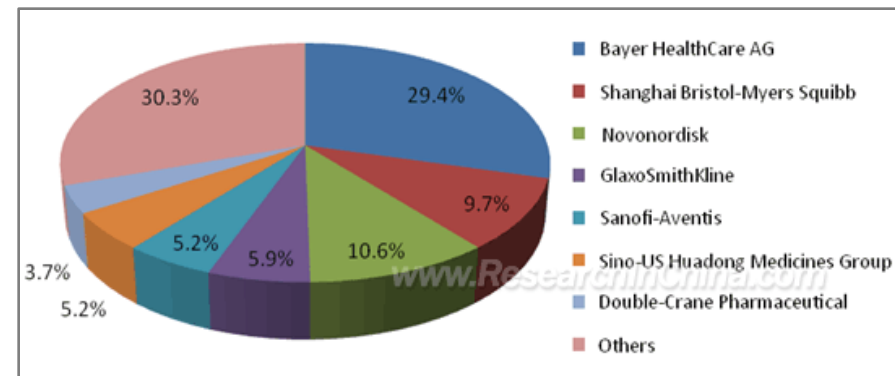
Abstract

In 2009, the consumption of oral hypoglycemic agents (OHAs) in China increased by 15.1% to RMB9.81 billion, accounting for approximately 5% of the world's total. At present, China is a country with the most populous victims of diabetes, numbering as high as 92 million. But the treatment rate of this disease in China is, generally speaking, less than 30%. Coupled with the comparatively low per capita treatment payment, which is no more than 3% of that in the US, China will witness a huge potential in the OHAS market.

Among all the OHAS, patent medicines made by overseas pharmaceutical enterprises are hailed as “star products”. Many generic drugs exert little impact on patent medicines although they spring up. Meanwhile, foreign enterprises firmly control Chinese market by means of successful marketing strategy and product upgrading. In 2009, foreign enterprises occupied the top 5 by procurement value among the OHAS providers for China-based hospitals, making up as high as 60.8%. In particular, the ranking first

Bayer, an acarbose producer, enjoyed a share of 29.4%. Of the top 10 enterprises by sales performance, Beijing Wanhui Double-Crane Pharmaceutical was the sole homegrown enterprise that produces gliquidone, with the market share no more than 3.7%.

Leading Enterprises and Market Share of OHAS Providers for China-based Hospitals, 2009



Source: China Pharmaceutical Industry Association;
ResearchInChina

The report not only probes into the status quo and competition pattern of the market, drug use of hospitals, and development tendency of OHAS industry, but also analytically elaborates the market segments as well as the operation and prospect of leading manufacturers, including 7 foreign enterprises and joint ventures playing dominant position in OHAS traditional western medicine varieties and Chinese patent medicine market as well as four Chinese counterparts of certain scale.

In addition, new OHAS varieties such as DDP-IV inhibitor and GLP-1 analog have been inflowing into Chinese market, including Januvia produced by Merck & Co Inc, and Onglyza by Bristol-Myers Squibb and AstraZeneca, which pose grave threat to traditional OHAS because of the good effect and little side-effect.

OHAS Products Made in China and Market Share of Preventative Manufacturers in Hospital Medicine Market, 2009

Categories	Products	Producers	Market Share of Subdivided Products
α-glucosidase inhibitor	Acarbose	Bayer HealthCare AG	84%
		Huadong Medicine	15%
biguanide	Metformin	Shanghai Bristol-Myers Squibb	76.1%
Non-sulfonylureas	Repaglinide	Novonordisk	91.1%
sulfonylureas	Glimepiride	Sanofi-Aventis	68.3%
		Wanbang Biopharmaceuticals	8.0%
	Gliclazide	Servier (Tianjin)	80.7%
	Glipizide	Pfizer	79.7%
	gliquidone	Double-Crane Pharmaceutical	95%
thiazolidinediones (TZDS)	Rosiglitazone	GlaxoSmithKline	72.9%
Chinese Patent Medicine	Thirsty Releever	Guangzhou Pharmaceutical	-

Source: ResearchInChina

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