



**China Contract Research Organization (CRO)
Industry Report, 2010-2011**

July 2011

This report

- ◆ **Analyzes the development environment of China CRO industry.**
- ◆ **Focuses on market analysis on CRO industry and regional market.**
- ◆ **Highlights the operation of key enterprises in China and worldwide.**

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Abstract

Under the circumstances of increasingly high R&D costs of new drugs worldwide, the contract research organization (CRO) industry has developed rapidly in recent years thanks to its advantages of shortening the R&D cycle and cost saving. In 2010, the global market size of CRO achieved RMB36 billion, which undertook nearly one third of the R&D of new drugs. CRO industry started relatively late in China, and still in its initial stage with only a few business varieties. In China, the market size of CRO was merely USD2.6 billion (about RMB16.9 billion) in 2010. However, with rapid development, currently there are almost 500 CRO enterprises in China.

Although there are many CRO enterprises in China, large-scale enterprises are less than 10 companies. WuXi AppTec and ShangPharma, two NYSE listed companies, are the largest CRO enterprises in China.

WuXi AppTec is the leading enterprise in domestic CRO industry, whose clients include 9 of the top 10 pharmaceutical enterprises worldwide. In Jan. 2008, it successfully acquired AppTec Laboratory Services Inc. for USD151 million, initiating the overseas expansion of Chinese CRO enterprises.

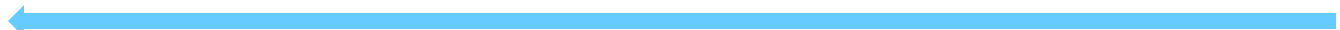
ShangPharma is the second largest CRO enterprise in China. It has over 100 enterprise and academic research institution clients, including the top 10 pharmaceutical enterprises in the world. With the aim to enhance its R&D strength, ShangPharma plans to construct cGMP base and laboratory service building with the funds raised from its IPO in 2010.

Currently, most of the CRO enterprises can only accomplish a single section in the R&D process, therefore, in order to complete the industry chain and enhance the competitiveness, M&A and setting up industry alliance has become a trend in China's CRO industry. From 2007 to Apr. 2011, there were at least 6 M&A cases in the CRO industry of China. As of Apr. 2011, there were five biopharmaceutical CRO industry alliances in China, including Alliance of Bio-Box Outsourcing, China, Zhongguancun Bio-pharmaceutical R&D Outsourcing Alliance, Shanghai Pudong Bio-Pharmaceutical R&D Outsourcing Service Alliance, CROSA and Chengdu Bio-pharmaceutical R&D Outsourcing Alliance. Having witnessed the advantage of CRO alliances in China, foreign companies participated in as well. For instance, the European company NovaSecta joined CROSA.

M&A Cases of CRO Industry in China, 2007-2011

Time	Amount	Acquirer	Acquiree
Jun. 2007	---	Sandia	Shanghai United Pharmatech
Jan. 2008	USD163 million	WuXi AppTec	AppTec Laboratory Services Inc.
Nov. 2009	---	PPD	Excel PharmaStudies Inc
Nov. 2009	USD77 million	PPD	BioDuro LLC
Jan. 2010	---	Phamaron	Bridge Laboratories
20 Apr., 2011	USD61.8 million	Sciclone Pharmaceuticals	NovaMed Pharmaceuticals

Source: ResearchInChina



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