



China Chemical Pharmaceutical Industry Report, 2011

Jan. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include NBS(National Bureau of Statistics of China), Wind, and China National Pharmaceutical Industry Information Center etc.

Abstract

In Jan.-Aug., 2011, the gross industrial output value of Chinese chemical pharmaceutical industry surged by 24.54% YoY to RMB460.531 billion, up 2.67 percentage points over the same period of last year, presenting remarkable upward momentum. **The chemical pharmaceutical industry of China chiefly comprises two sub-sectors chemical API and drug preparation which show differentiated development.**

China is currently the world's largest producer and exporter of chemical API and can produce more than 1,500 varieties with the capacity approximating 2 or 3 million tons. However, key bulk API products including vitamins and antibiotics witness overcapacity, which has resulted in low-price competition bringing adverse impact on the export of API. **In Q1 2011, the API export of China increased by 39.53% year on year, with the export value rising 31.31% from the same period of last year, while the average export price fell 5.89% year-on-year. In particular, the average export price of Vitamin C slumped by 30%.**

In comparison with chemical API sector, the chemical drug preparation sector of China enjoys higher profitability as a whole, with the gross margin in 2010 hitting 39.6% and two-fold of that of API industry. Yet, chemical preparation industry of China is still in its infancy with short R&D capability of new drugs, and therefore the production of generics is the mainstream.

The report focuses on the **market size and development trend** of China chemical pharmaceutical industry as well as the **market scale of API** and chemical preparation on the basis of the outlook for new drug R&D and market development worldwide. In addition, the **market planning and new drug R&D of the leading 20 listed industrial players** is also analyzed here.

Operating Revenue and Net Income of Leading Manufacturers in China

Listed Company	Operating Revenue	Net Income
Huadong Medicine	8,195	293
North China Pharmaceutical	6,591	233
Fosun Pharma	4,633	1,068
Beijing Double-crane Pharmaceutical	4,522	404
Zhejiang HISUN Pharmaceuticals	3,629	350
Zhejiang Medicine	3,588	809
Northeast Pharmaceutical Group	3,587	-130
Jiangsu Hengrui Medicine	3,319	672
Guangzhou Baiyunshan Pharmaceutical	2,843	210
Harbin Pharm. Group Sanjing Pharmaceutical Shareholding	2,701	318
Zhejiang NHU	2,526	941
Shandong Xinhua Pharmaceutical	2,266	80
Livzon Pharmaceutical Group	2,264	281
Shenzhen Hepalink Pharmaceutical	2,068	510
Zhejiang Huahai Pharmaceuticals	1,379	191
Zhejiang Xianju Pharmaceutical	1,260	99
Jiangsu Nhwa Pharmaceutical	1,186	87
Tianjin Tianyao Pharmaceuticals	1,120	61
Hainan Haiyao Co., Ltd	514	143
Huapont	477	104

Source: ResearchInChina

Northeast Pharmaceutical Group Co., Ltd. is one of the largest Vitamin C producers in China. In 2011, the Vitamin C capacity of the company reached 25,000 tons. Currently, its investment is mainly earmarked for API. Also in 2011, it raised funds RMB2.645 billion to build Xihe-based API production base covering Vitamin C API, fosfomycin series products, L-carnitine series, and so forth.

As one of key chemical pharmaceutical companies in China, the operating revenue of **Huadong Medicine Co., Ltd** in Jan.-Sep., 2011 increased by 25.51% year-on-year to RMB8.195 billion. Its holding subsidiary, Hangzhou Zhongmei Huadong Pharmaceutical, is regarded as the largest immunosuppressant producer in China.

Jiangsu Hengrui Medicine Co., Ltd is the one with the most new drugs independently developed among pharmaceutical companies in China. In 2011, it filed for the production of four new drugs with Class I -III and for the clinical trial of four new chemical medicines with class III-V and one biological medicine with class IX. Moreover, eleven new chemical medicines with class I - V and one biological medicine with class IX were under clinical trial. In December 2011, Irinotecan injection developed by Jiangsu Hengrui Medicine Co. won the FDA certification and became qualified to be sold in the US market, which made it be the first of this kind among Chinese peers.

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