



China Insulin Industry Report, 2012-2015

Jan. 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

China is a country with the largest number of diabetics. In 2011, the market scale of diabetes medicine in China approximated RMB13.8 billion, of which, insulin medicines mainly comprising recombinant human insulin and insulin analog accounted for 52.8%.

Due to high technological content and entry barriers, Chinese insulin market is monopolized by foreign corporations. In 2011, the combined market share of the three world-renowned pharmaceutical tycoons including Novo Nordisk, Eli Lilly and Company, and Sanofi Group hit 90% in the Chinese market. By contrast, the largest domestic counterpart-Tonghua Dongbao Pharmaceutical -occupied merely 3.4% or so.

Denmark-based Novo Nordisk is not only the leader in global insulin industry, but also a major supplier in China's insulin market with the recombinant human insulin market share of 76% and the insulin analog market share of 53% in 2011.

America-based Eli Lilly and Company is the second embarking on Chinese insulin market, with the recombinant human insulin market share of 17% and the insulin analog market share of 8% in 2011. Moreover, Eli Lilly and Company is making constant efforts to extend business in the Chinese market. In May, 2012, Eli Lilly and Company China R&D center was formally opened in Shanghai, dedicated to the R&D of diabetes medicines; in June, the Suzhou-based insulin extension project with

the investment exceeding USD40 million was also put into service.?

Jilin-based Tonghua Dongbao Pharmaceutical is China's largest recombinant human insulin producer, with the insulin API capacity of 3,000 kg and the insulin preparation capacity of 70 million bottles or 6% market share in China's recombinant human insulin market. In 2012, the company's recombinant human insulin injection phase III project with the annual capacity of insulin preparation targeting 126 million pcs started construction, and it is expected to be put into production in Q4 2013.?

As the world's fourth and China's first insulin analog producer, Gan & Lee Pharmaceuticals realized the market share of 6% in China's insulin analog market in 2011. In April 2012, the insulin phase III project of the company held the groundbreaking ceremony. Once the project is put into production as scheduled, the company is expected to increase its capacity of insulin API by 750kg/a and of insulin preparation by 38.5 mln pcs/a.

Enterprises including Hisun Pharmaceutical, United Laboratories and Bayer, with positive outlook of demand for insulin in the Chinese market, are beefing up gaining ground in China through developing new products, building new production bases and agent marketing.

The report highlights the followings:

- Global insulin industry: development, supply & demand, product R&D, competition pattern, development trend, etc.
- China insulin industry: development, supply & demand, import & export, competition pattern, policy environment, development trend, etc.
- Operation, insulin business analysis and development outlook of seven insulin producers worldwide.

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