

China Pharmaceutical Equipment Industry Report, 2012-2015

Mar. 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.

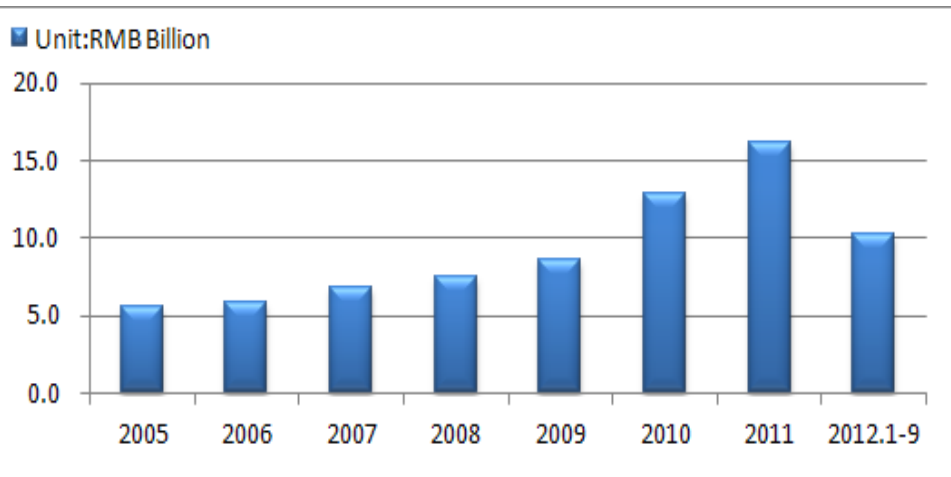
INFORMATION SOURCES

The primary information sources include Company Reports, Ministry of Health of the People's Republic of China and National Bureau of Statistics of China etc.

Abstract

Driven by the new GMP certification as well as the brisk downstream demand, China pharmaceutical equipment industry has seen steady progress in sales volume and technological content of products over the years, with industrial sales showing a rapid growth trend. In line with statistics of the China Association for Pharmaceutical Equipment, in 2011 the pharmaceutical equipment industry of China achieved gross industrial output value of RMB15.84 billion, a year-on-year increase of 23.5%;

Sales of China Pharmaceutical Equipment Industry, 2005-2012



Source: China Association for Pharmaceutical Equipment;
 ResearchInChina *China Pharmaceutical Equipment Industry Report, 2012-2015*

sales of RMB16.1 billion, up 25.2% year-on-year; total profit of RMB1.818 billion, up 19.3% YoY; and gross margin of the industry rose to 11.3%.

For now, the leading companies in Chinese pharmaceutical equipment industry are primarily concentrated in drying, packaging and sterilization areas, such as Shinva Medical Instrument Co., Ltd., Shanghai Tofflon Science and Technology Co., Ltd., Truking Technology Limited, and Hunan China Sun Pharmaceutical Machinery Co., Ltd.. According to the new GMP regulations and the enforcement of pharmaceutical companies, 2011-2012 is a rapid growth period for China pharmaceutical equipment industry; as the certification ends in 2015, industry revenue growth in 2013-2014 will slow down. It is expected that in 2015, sales of China pharmaceutical equipment industry will attain to RMB31.41 billion.

Chinese pharmaceutical equipment enterprises generally adopt the customized business model, with a relatively low industry concentration. In recent years, market share of the top four enterprises (CR4) is maintained at about 25%. In 2011, Shinva Medical in the first position obtained the revenue of RMB2.1061 billion, with market share up to 13.1%. Copyright 2012ResearchInChina

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mainly covers the followings:

- Status analysis, including industry development, industry concentration, entry barriers, competition pattern, technical status and development trend, etc.;
- Development environment analysis, involving regulatory system, regulatory policies, industry policies, influences from upstream and downstream sectors, etc.;
- Market size prediction, concerning three key market segments i.e. sterilization equipment, drying equipment, and large-volume infusion production line, as well as corporate development mode, market competition trends, and so on;
- Production, operation, investment, M&A, development forecast, etc. of ten Chinese pharmaceutical equipment enterprises like Shinva Medical, Tofflon, Truiking Technology and Hunan China Sun.

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