

China Heparin Industry Report, 2013-2015

Oct. 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

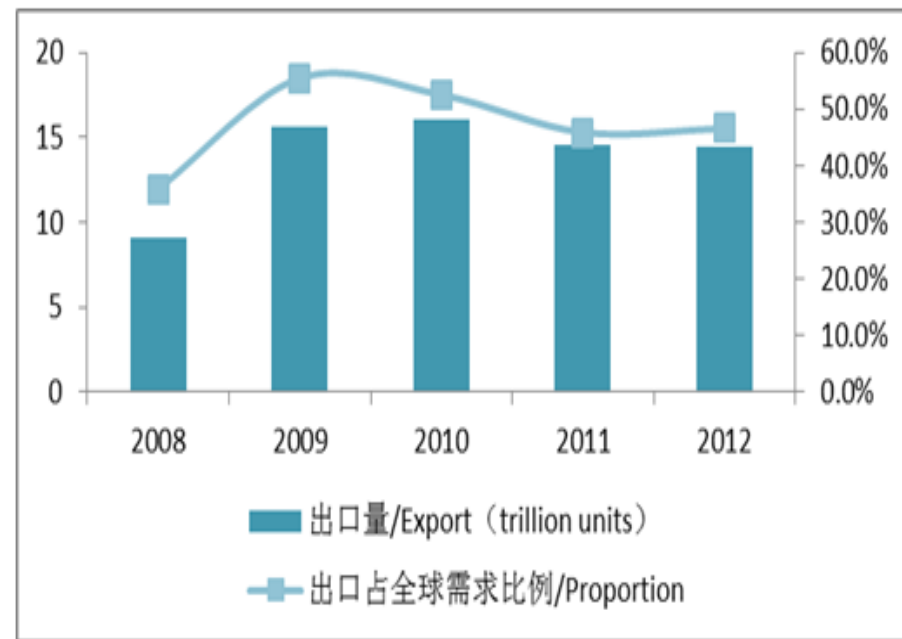
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Since the small intestines of pigs (raw materials for production of heparin) in China are abundant (the pig slaughtering volume in China approximates 50% of globe's total) and heparin APIs are gradually recognized internationally, China has grown into the largest heparin API producing and exporting country around the globe. Nevertheless, due to the stagnant demand in European and American markets in recent two years and the improved standards for heparin export, the export volume and value of heparin APIs in China both presented a decline trend during 2011-2012. In 2012, the export volume of heparin APIs in China only registered 103.86 tons (with a year-on-year decline of 1.3%), or about 14.5 trillion units (based on 140IU/mg), addressing 46.5% of global heparin API demand in corresponding period.

Hepalink, Nanjing King-friend, Dongcheng Biochemicals and Qianhong Bio-pharma are major suppliers of heparin API around the globe. With output and sales volume of heparin API above trillion units in recent years, the four enterprises have been the largest exporters of heparin in China for consecutive years, and shared over 70% of China's total export of heparin.

Export Volume of Heparin APIs in China and Its Proportion of Global Demand, 2008-2012



Source: China Customs; ResearchInChina China Heparin Industry Report, 2013-2015

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Although leading heparin enterprises have had the plans of capacity expansion and heparin industrial chain improvement in previous years, affected by sluggish market demand, enhanced technical standards and other factors, a number of heparin API projects originally planned to start production in 2012 or 2013 were postponed successively, such as the 5T/A project of Hepalink, 2.8T/A project of Dongcheng Biochemicals, 4T/A unfractionated heparin sodium and 1.2T/A low-molecular-weight heparin sodium project of Nanjing King-friend. The API project of Qianhong Bio-pharma was completed at the end of 2012, but has not been put into production yet.

Nevertheless, from the perspective of projects proposed and under construction, it is predicted that the newly added capacity of heparin API in China will exceed 23 trillion units by 2015, and the total capacity in China will meet 80% of globe's total demand.

Along with the increasing of heparin API deliverability, the competitiveness of heparin preparation products in China is also strengthened gradually. Taking the low-molecular-weight heparin calcium market as an example, the market share of GlaxoSmithKline's Nadroparin in China was 61.0% in 2008, but the figure declined to 52.5% in 2011, and was estimated to decline to 40% or so in 2012. Nevertheless, the low-molecular-weight heparin calcium of Changshan Biochemical has become the first product in China that can compete with the overseas big brands. The revenue of the product only registered RMB86.93 million in 2011, and climbed up to RMB289.6 million in 2012.

China Heparin Industry Report, 2013-2015 mainly consists of the following contents:

- ✘ Entry barrier, global market supply & demand, competition pattern, forecast, etc. of heparin industry in China;
- ✘ Development status, market supply & demand, competition pattern, import & export, development prospect, etc. of heparin API industry in China;
- ✘ Development status, market supply & demand, competition pattern, development prospect, etc. of heparin preparation industry in China;
- ✘ Operation, heparin business, development prospect, etc. of seven heparin enterprises including Hepalink, Nanjing King-friend, Dongcheng Biochemicals, Qianhong Bio-pharma and Changshan Biochemical.

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