



**Global and China Insulin Industry Report,  
2013-2017**

**Dec. 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.

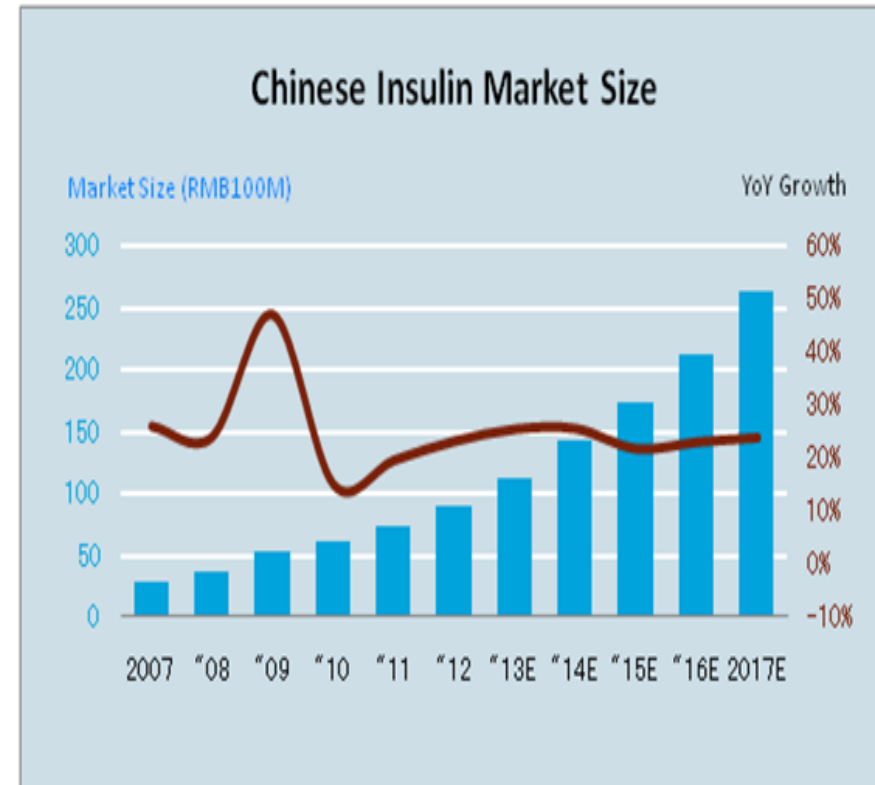
## INFORMATION SOURCES

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

## Abstract

As the third largest human health disease following neoplastic disease, cardiovascular and cerebrovascular diseases, the number of diabetic patients has continued growing from 246 million in 2007 to 382 million in 2013 at a compound annual growth rate of 7.6%. And insulin as the important diabetes medication has also seen increasing market size. In 2012 the global insulin market size reached US\$20.8 billion, a year-on-year rise of 12.9%, basically monopolized by Novo Nordisk, Sanofi and Eli Lilly, which altogether accounted for 88.7% of market share.

Being the biggest diabetes power in the world, China currently has 98.4 million patients, accounting for about 25.8% of the world's total. With the maturing of national health insurance system and improvement of economic level, the Chinese insulin drug market size has been on the rise, with the CAGR in 2007-2012 up to 25.4%, well above that of the global insulin market size, and it is expected to maintain a CAGR of at least 15% in the next few years.



Source: ResearchInChina Global and China Insulin Industry Report, 2013-2017

Insulin has seen an increasing proportion of Chinese diabetes drug market, from 38.7% in 2007 to 55.6% in 2012. However, due to technical barriers, China's insulin market is mainly occupied by Novo Nordisk, Sanofi and Eli Lilly, of which, Novo Nordisk accounted for 60.3% in 2012. While in recombinant human insulin market segments, the local Chinese enterprise –Tonghua Dongbao Pharmaceutical Co., Ltd. occupied part of the market with approximately 16% share.

Attracted by China's tremendous diabetes drug market, multinational companies like Bayer, United Laboratories as well as the local Wanbang Biopharmaceuticals and Hisun Pharmaceutical are speeding up layout in China's insulin market. Among them, Bayer Schering Pharma has obtained exclusive marketing and distribution rights of Poland's Bioton insulin product "SciLin" in China as early as 2009; the recombinant Lispro Insulin of Wanbang Biopharmaceuticals has also received clinical approval issued by SFDA in September 2013.

**Global and China Insulin Industry Report, 2013-2017 mainly covers the followings:**

- ✘ Development status, supply and demand, competition pattern, R&D for new products, development tendency , etc of global insulin market;
- ✘ Relevant policies, supply and demand, import and export, competition pattern, market price, development tendency , etc of Chinese insulin market;
- ✘ Operating conditions, insulin business and development forecast, etc of three international insulin giants - Novo Nordisk, Sanofi, Eli Lilly as well as four local companies e.g. Dongbao, Wanbang Biopharmaceuticals.

### 1. Overview of Insulin

- 1.1 Definition
- 1.2 Classification
- 1.3 Industry Chain

### 2. Development of Global Insulin Market

- 2.1 Status Quo
- 2.2 Market Supply and Demand
- 2.3 Product R&D
- 2.4 Competition Pattern
- 2.5 Trends

### 3. Development of China Insulin Market

- 3.1 Status Quo
- 3.2 Market Supply and Demand
- 3.3 Import and Export
  - 3.3.1 Insulin and Its Salts
    - 3.3.1.1 Import and Export Value
    - 3.3.1.2 Main Exporting Countries
    - 3.3.1.3 Main Importing Countries
  - 3.3.2 Non-dosed Insulin Containing Drugs
  - 3.3.3 Dosed Insulin Containing Drugs
  - 3.3.4 Insulin Imports of Typical Hospital
- 3.4 Competition Pattern
- 3.5 Market Price
- 3.6 Relevant Policies
- 3.7 Trends

### 4. Key Insulin Companies

- 4.1 Novo Nordisk
  - 4.1.1 Profile
  - 4.1.2 Operation
  - 4.1.3 Revenue Structure
  - 4.1.4 Gross Margin
  - 4.1.5 R&D Expenditure
  - 4.1.6 Insulin Business
  - 4.1.7 Business in China
  - 4.1.8 Development Forecast
- 4.2 Eli Lilly
  - 4.2.1 Profile
  - 4.2.2 Operation
  - 4.2.3 Revenue Structure
  - 4.2.4 Gross Margin
  - 4.2.5 R&D and Investment
  - 4.2.6 Insulin Business
  - 4.2.7 Business in China
  - 4.2.8 Prospects
- 4.3 Sanofi
  - 4.3.1 Profile
  - 4.3.2 Operation
  - 4.3.3 Revenue Structure
  - 4.3.4 Gross Margin
  - 4.3.5 R&D and Investment
  - 4.3.6 Insulin Business
  - 4.3.7 Business in China

- 4.3.8 Prospects
- 4.4 Dongbao
  - 4.4.1 Profile
  - 4.4.2 Operation
  - 4.4.3 Revenue Structure
  - 4.4.4 Gross Margin
  - 4.4.5 Clients
  - 4.4.6 R&D and Investment
  - 4.4.7 Insulin Business
  - 4.4.8 Prospects
- 4.5 Wanbang Biopharmaceuticals
  - 4.5.1 Profile
  - 4.5.2 Operation
  - 4.5.3 Insulin Business
- 4.6 Gan & Lee
  - 4.6.1 Profile
  - 4.6.2 Operation
- 4.7 Xinbai Pharmaceutical

### 5. Summary and Forecast

- 5.1 Comparison of Operations between International Giants and Local Chinese Enterprises
- 5.2 Industry Forecast
  - 5.2.1 Number of Diabetic Patients in the World
  - 5.2.2 Global Insulin Market Size
  - 5.2.3 Number of Diabetic Patients in China
  - 5.2.4 Chinese Insulin Market Size

- Types of Diabetes
- Classification of Insulin (by Technical Level / Time)
- Recombinant Human Insulin-producing Carriers and Their Characteristics
- World's Top 10 Diabetes Drugs by Sales, 2012
- Theoretical Global Demand for Insulin API, 2013
- R&D Process for Some Insulin Products Worldwide by September 2013
- Revenue of the World's Leading Insulin Companies and Their R&D Costs as a Percentage of Revenue, 2012
- Insulin Import Value of Typical Hospital in 22 Chinese Cities (by Category), 2008-2012
- Maximum Retail Prices of Some Insulin Products in China, 2013
- Insulin Drugs Listed in China Health Insurance Directory, 2012
- Market Share of Novo Nordisk Insulin (by Country), 2012-2013
- Distribution of Novo Nordisk's Subsidiaries in China
- Novo Nordisk's Revenue, Net Income and YoY Growth Rate, 2012-2017E
- Distribution of Eli Lilly's Cooperative Enterprises (by Product), 2013
- Eli Lilly's Revenue, Net Income and YoY Growth Rate, 2012-2017E
- Distribution of Sanofi's Main Subsidiaries in China, 2012
- Sanofi's Revenue, Net Income and YoY Growth Rate, 2012-2017E
- Distribution of Dongbao's Subsidiaries, 2013
- Dongbao's Revenue from Top 5 Clients and % of Total Revenue, 2010-2013
- Name List and Revenue Contribution of Dongbao's Top 5 Clients, 2012-2013
- Dongbao's Revenue, Net Income and YoY Growth Rate, 2012-2017E
- Holding Subsidiaries of Wanbang Biopharmaceuticals
- Insulin Products of Gan & Lee
- Insulin Industry Chain
- Number of Diabetic Patients Worldwide, 2007-2013

- Number of Patients in the World's Top 10 Diabetes Countries, 2013
- Market Size of the World's Top 10 Therapeutic Drugs, 2012
- Global Diabetes Drug Market Size and YoY Growth Rate, 2006-2013
- Global Diabetes Drug Market Size and Share (by Category), 2012
- Global Insulin Market Size and YoY Growth Rate, 2006-2012
- Global Per Capita Consumption of Insulin (by Country), 2000 vs. 2013
- Global Insulin Pump Market Size, 2012-2017E
- Global Insulin Market Share (by Enterprise), 2012
- Number of Diabetic Patients in China, 2011-2013
- Number and Proportion of Diabetic Patients in China (by Gender), 2013
- Number and Proportion of Diabetic Patients in China (by Census Register), 2013
- Number and Proportion of Diabetic Patients in China (by Age), 2013
- China's Diabetes Drug Market Size and YoY Growth Rate, 2006-2013
- China's Insulin Drug Market Size, 2007-2012
- Hospital Market Share of Diabetes Treatment in China (by Drug), 2007-2012
- Import and Export Value of China's Insulin and Its Salts 2008-2013
- Export Value and Proportion of China's Insulin and Its Salts (by Country), 2012
- Export Value and Proportion of China's Insulin and Its Salts (by Country), Jan-Sep 2013
- Import Value and Proportion of China's Insulin and Its Salts (by Country), 2012
- Import Value and Proportion of China's Insulin and Its Salts (by Country), Jan-Sep 2013
- Export Value of China's Non-dosed Insulin Containing Drugs, 2010-2013
- Export Value of China's Dosed Insulin Containing Drugs and YoY Growth Rate, 2008-2013
- Import Value of China's Dosed Insulin Containing Drugs and YoY Growth Rate, 2008-2013
- Export Value and Proportion of China's Dosed Insulin Containing Drugs (by Country), 2012
- Export Value and Proportion of China's Dosed Insulin Containing Drugs (by Country), Jan-Sep 2013

- Import Value of China's Dosed Insulin Containing Drugs (by Country), 2012
- Import Value of China's Dosed Insulin Containing Drugs (by Country), Jan-Sep 2013
- China's Insulin Market Competition Pattern, 2012
- China's Recombinant Human Insulin Market Competition Pattern, 2012
- China's Insulin Analog Market Competition Pattern (by Enterprise), 2012
- Core Strategy of Novo Nordisk
- Novo Nordisk's Revenue and YoY Growth Rate, 2008-2013
- Novo Nordisk's Net Income and YoY Growth Rate, 2008-2013
- Revenue Breakdown of Novo Nordisk (by Product), 2008-2013
- Revenue Breakdown of Novo Nordisk (by Region), 2008-2013
- Gross Margin of Novo Nordisk, 2008-2013
- R&D Costs and % of Total Revenue of Novo Nordisk, 2008-2013
- Modern Insulin Market Segments of Novo Nordisk (by Region), 2012
- Insulin Revenue Breakdown of Novo Nordisk (by Product), 2010-2013
- Novo Nordisk's Revenue in China and YoY Growth Rate, 2008-2013
- Insulin Revenue Breakdown of Novo Nordisk in China (by Product), 2010-2013
- Eli Lilly's Revenue and YoY Growth Rate, 2008-2013
- Eli Lilly's Net Income and YoY Growth Rate, 2008-2013
- Revenue Breakdown of Eli Lilly (by Field), 2010-2013
- Revenue Breakdown of Eli Lilly (by Region), 2010-2012
- Integrated Gross Margin of Eli Lilly, 2008-2013
- R&D Costs and % of Total Revenue of Eli Lilly, 2008-2013
- Eli Lilly's Insulin Revenue (by Product) and YoY Growth Rate, 2008-2013
- Insulin Revenue Breakdown of Eli Lilly (by Region), 2008-2013
- Sanofi's Revenue and YoY Growth Rate, 2008-2013



- Sanofi's Net Income and YoY Growth Rate, 2008-2013
- Revenue Breakdown of Sanofi (by Product), 2008-2013
- Revenue Breakdown of Sanofi (by Region), 2010-2013
- Integrated Gross Margin of Sanofi, 2008-2013
- R&D Cost of Sanofi (by Product), 2008-2013
- Insulin Revenue Breakdown of Sanofi (by Product), 2008-2013
- Insulin Revenue Breakdown of Sanofi (by Country or Region), 2011-2013
- Sanofi's Revenue in China and YoY Growth Rate, 2009-2013
- Dongbao's Revenue and YoY Growth Rate, 2008-2013
- Dongbao's Net Income and YoY Growth Rate, 2008-2013
- Revenue Breakdown of Dongbao (by Product), 2008-2013
- Revenue Breakdown of Dongbao (by Region), 2008-2013
- Gross Margin of Dongbao (by Product), 2008-2013
- Dongbao's Insulin Revenue and YoY Growth Rate, 2008-2013
- Wanbang Biopharmaceuticals' Net Income and YoY Growth Rate, 2008-2013
- Revenue and Net Income of Xinbai Pharmaceutical, 2008-2013
- Revenue and Net Income of the World's Leading Insulin Companies, 2012
- Global Insulin Revenue Breakdown (by Company), 2012
- Number of Diabetic Patients in the World, 2007-2017E
- Global Insulin Market Size and YoY Growth Rate, 2012-2017E
- Number of Diabetic Patients in China, 2011-2017E
- Proportion of Insulin Drugs in China's Diabetes Drug Market, 2007-2013
- China's Insulin Drug Market Size, 2012-2017E

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