



# **China Pharmaceutical Equipment Industry Report, 2013-2016**

**Feb. 2014**

## 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

After decades of development, China has become a major producer of pharmaceutical equipment in the world. Since 2010, affected by the new GMP certification and other factors, the revenue and total profit of China's pharmaceutical equipment industry both have increased significantly, and the revenue achieved a year-on-year growth rate of 51.5%, 28.2% and 26% in 2010-2012 respectively.

However, restricted by the actual progress of new GMP certification and market capacity, the revenue growth of China's pharmaceutical equipment industry will slow down in 2013-2016, probably at an annual average growth rate of 20% or so, and the revenue is expected to reach RMB 53.22 billion in 2016.

Due to a wide range of pharmaceutical equipment product categories and a customized business model generally adopted by enterprises, there is no one or a few pharmaceutical equipment companies capable of controlling the entire market, the industry concentration is low, the majority of enterprises are small and medium-sized, and the market concentration is low ( $20\% \leq CR8 < 40\%$ ).

Shinva Medical Instrument Co., Ltd. is a leading sterilization equipment company in China. Its revenue from medical equipment (including

pharmaceutical equipment) was RMB 2.408 billion in 2012 and RMB 1.524 billion in the first half of 2013. According to the statistics of China Association for Pharmaceutical Equipment, Shinva sold 10,048 units of sterilization equipment in 2012 and 7,873 units in the first 11 months of 2013, accounting for 86.8% and 84.3% of the total sales volume

Shanghai Tofflon Science and Technology Co., Ltd. is the leader in China's freeze-drying system industry, and realized revenue of RMB 822 million in 2012, accounting for 3.3% of China's pharmaceutical equipment market; in China's freeze-dryer market, it occupied a market share of 50-60% by sales in 2012 and 2013.

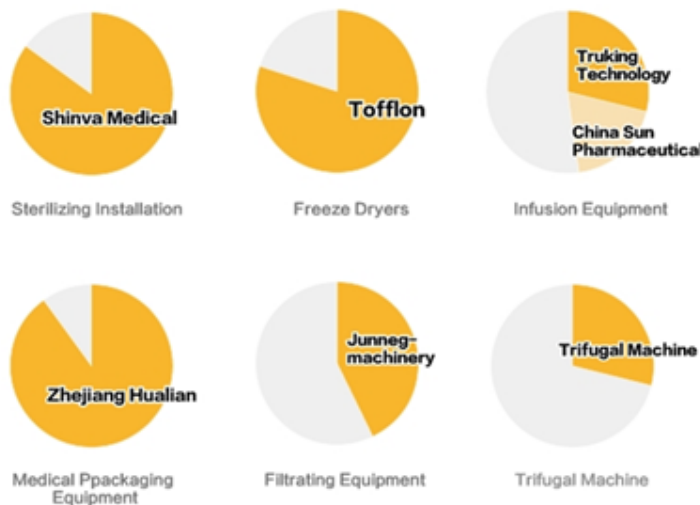
Truiking Technology Limited is a major supplier of liquid injection pharmaceutical equipment in China, its revenue in 2012 was RMB 589 million, occupying 2.3% of China's pharmaceutical equipment market; in 2012, it accounted for 29.2% of the infusion device market by sales volume. Hunan China Sun Pharmaceutical Machinery Co., Ltd. is also an important supplier of injection pharmaceutical equipment in China, its revenue in 2012 was RMB 365 million, holding 1.4% of China's pharmaceutical equipment market; in 2012, it contributed 19.1% of the sales volume in the infusion device market.

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## China Pharmaceutical Equipment Industry Report, 2013-2016 mainly includes the following aspects:

- ✘ Market scale, market demand, competition pattern, policy environment and development trends of China pharmaceutical equipment industry;
- ✘ Development status and scale forecast of pharmaceutical equipment products (sterilization equipment, drying equipment, injection packaging, etc.) in China;
- ✘ Development status, operation, pharmaceutical equipment business and development prospect of ten pharmaceutical equipment enterprises in China.

### Major Pharmaceutical Equipment Segmented Products and the Shares of Leading Companies in China, 2012-2013



Source: China Association for Pharmaceutical Equipment, ResearchInChina

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