

China Pharmaceutical Glass Packaging Industry Report, 2013-2016

Apr. 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

Influenced by the substitution of plastic, aluminum foil and other new packaging materials as well as the declining packaging material purchase prices incurred by the medical reform, China pharmaceutical glass packaging industry develops sluggishly. In 2013, China's pharmaceutical glass bottle market capacity amounted to 80 billion pieces with the weight of 250,000-300,000 tons.

Due to low entry barriers, Chinese pharmaceutical glass market is featured with serious overcapacity of medium and low-end products as well as the reliance of high-end products on imports. At present, developed countries prefer first-class waterproof neutral borosilicate glass, while China still in the main applies low borosilicate glass, sodium-calcium glass and "semi-neutral borosilicate glass" (its chemical stability can not meet neutral requirements; the heavy metal content in glass is not defined clearly; dimensions are not accurate). As for prefilled injection system glass, China mainly relies on the import from foreign brands such as German Schott.

The report involves the following:

Market size, market demand, competition pattern, import & export and development trend of China pharmaceutical glass industry;

Status quo, competition pattern and price analysis of China prefilled syringe industry;

Operation, pharmaceutical glass business and development prospects of four global and six Chinese pharmaceutical glass packaging enterprises.

After years of development and competition, Chinese pharmaceutical glass market concentration degree is still not high, but there have been competitive leading players in some market segments mainly in Jiangsu, Zhejiang and Shandong.

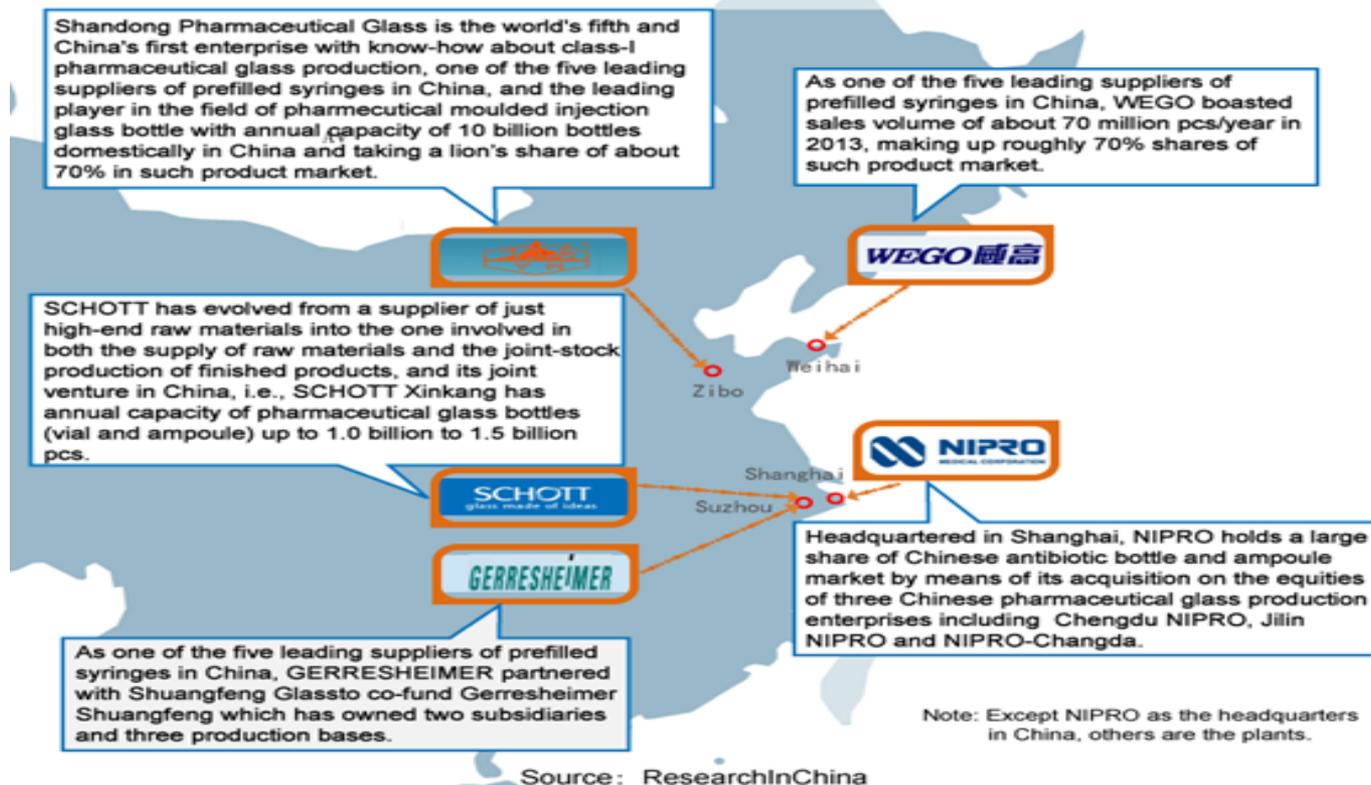
Shandong Pharmaceutical Glass is the world's fifth and China's first medical glass (Class-I) producer. As one of top five Chinese prefilled syringe suppliers, Shandong Pharmaceutical Glass has the capacity of 50 million units/a, but it is still exploring the market with a rather low market share. Meanwhile, the company is a leading pharmaceutical molded bottle enterprise in China with the capacity of 10 billion units/a and about 70% market share.

Weigao is also one of the top five Chinese prefilled syringe suppliers. By virtue of preemptive advantages and perfect sales networks, Weigao sold 70 million prefilled syringes in 2013, holding about 60% market share in China.

German Schott has transferred from simple high-end pharmaceutical glass raw material supply to the combination of raw material supply and joint production of finished products. Its joint venture in China -- Schott Xin Kang Pharmaceutical Packaging Co., Ltd. can produce 1-1.5 billion pharmaceutical glass bottles (vials and ampule bottles) each year.

Germany Gerresheimer conducts Plastic Systems, Molded Glass, Tubular Glass and Life Science Research in China. However, the prefilled syringes from the company in China are not made in China but imported. In addition, Gerresheimer and Shuangfeng Glass founded a high-end medical packaging material joint venture -- Gerresheimer Shuangfeng that has two subsidiaries located in Danyang city and Zhenjiang city, as well as three production sites (two in Danyang and one in Zhenjiang).

Competitive Edges of Key Pharmaceutical Glass Enterprises in China



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