



**China Pharmaceutical Distribution Industry
Report, 2013**

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

Thanks to the continuous advancement in new medical reform, China's pharmaceutical distribution industry has maintained a fairly rapid growth in recent years, with the sales value showed a CAGR of roughly 20% in 2005-2013. As the leading players in China's pharmaceutical distribution industry, Shanghai Pharma, Jointown and China National Accord Medicines achieved the revenue of RMB58.1 billion, RMB24.8 billion, RMB15.8 billion, respectively, in the first three quarters of 2013.

In terms of drug categories, western medicine constitutes the first major category in Chinese medicine distribution market, accounting for approximately 70% of total revenue from Chinese pharmaceutical products during 2012-2013. Then what comes the next are Chinese patent medicine and traditional Chinese medicinal materials, which occupied 16.8% and 4.5%, respectively, of total revenue. In terms of distribution channels, the proportion of China's drug retail terminal and hospital terminal market share stood at 1:4.

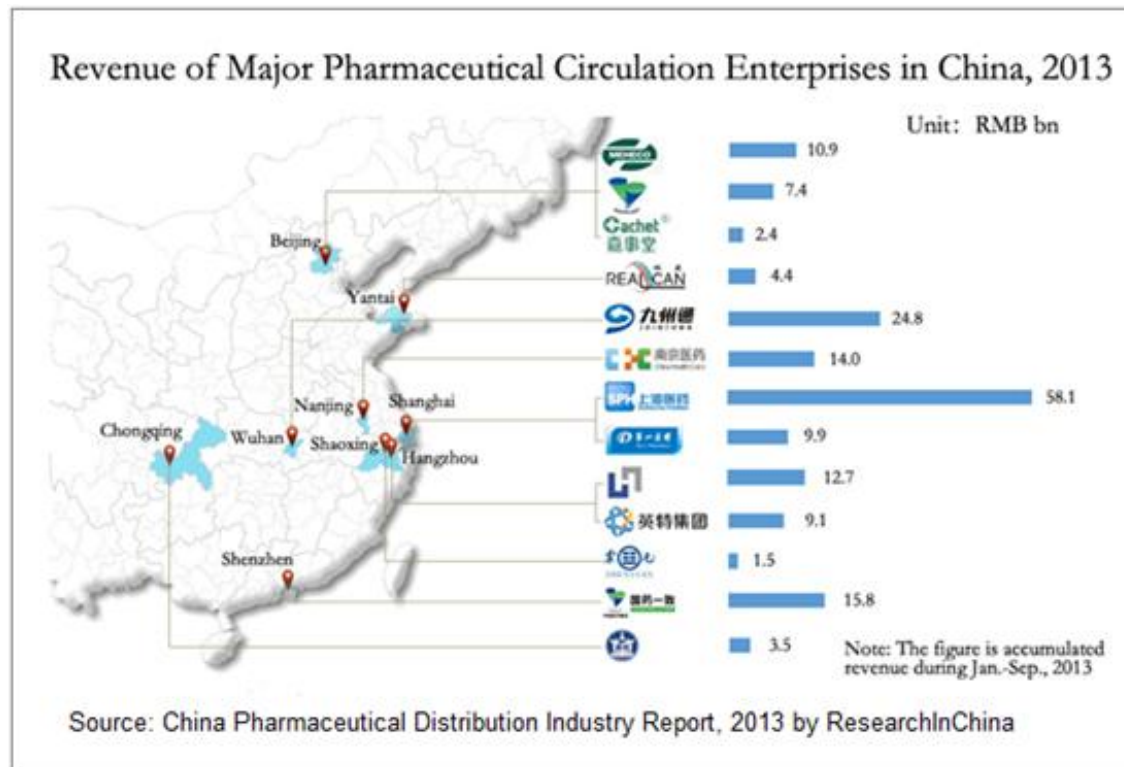
The concentration of Chinese pharmaceutical distribution industry is relatively low. Take pharmaceutical chain market for example. In recent

years, China's top 100 pharmaceutical chain enterprises have seen a rise in market share, but still less than 40%. In 2013, China's top 100 pharmaceutical chain enterprises posted a total of RMB98.36 billion in sales, up 11.9% from a year earlier. Guoda Drugstore under China National Accord Medicines still firmly held the first place in China's top 100 pharmaceutical chain enterprises, with the sales value for 2013 hitting RMB5.7 billion, a roughly 20% increase.

At present, Chinese pharmaceutical B2C sales model occupies a small market share in pharmaceutical terminal market, but grows rapidly. As of March 2014, a total of 235 companies in China have gained Qualification Certificate for Online Drug Trading Services, including 162 online pharmacies. In 2013, Chinese pharmaceutical B2C market presented the explosive growth, with transaction scale hitting RMB4.26 billion, up 166% from a year earlier. But due to policy restriction, consumers now fail to buy prescription drugs through pharmaceutical B2C, and medical insurance is not available, which would, to a certain extent, restrict the development of Chinese pharmaceutical B2C market.

China Pharmaceutical Distribution Industry Report, 2013-2017 involves the following:

- ✘ Business model, operating environment, market size, sales structure, etc of Chinese drug distribution industry;
- ✘ Stores, customers, sales structure and online pharmacies, etc of Top 100 Chinese drugstore chains;
- ✘ Operation, profits, etc of 13 listed companies in Chinese pharmaceutical distribution industry.



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