



Gross Margin of Major Companies in China

CRO Industry, 2009-2013

May 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

China CRO industry has developed rapidly in recent years, registering a CAGR of 27.2% during 2007-2013, of which the market size reached RMB 36 billion in 2013, occupying 10% of global market share.

As China is full of talents, has advantage of relatively low costs and is rich in disease spectrum, the world's renowned CRO companies, including Quintiles, Covance, Parexel and Charles River, have entered the Chinese market through sole proprietorship, corporation or acquisition, driving the industry towards standardization to some extent.

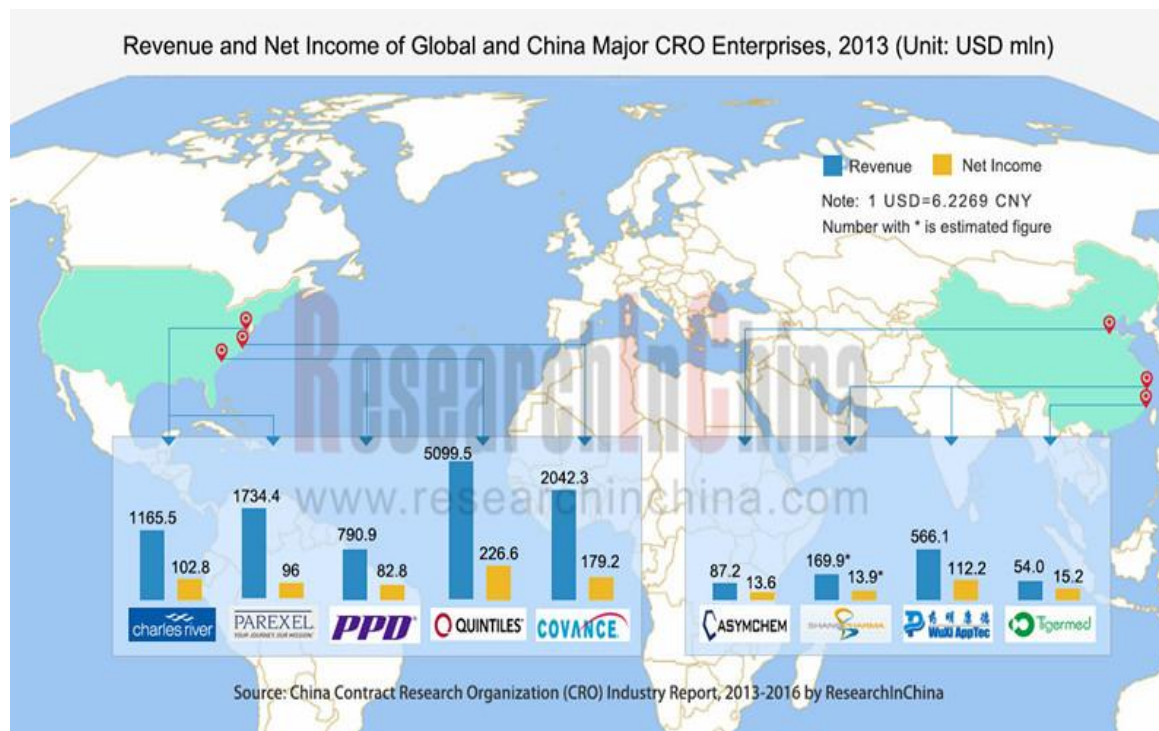
At present, there are about 500 companies involved in CRO market in China, but only a few of them are operating at scale and in good shape. WuXi AppTec, ShangPharma Corp, Asymchem and Hangzhou Tigermed Consulting Co., Ltd. Are the leading local CRO companies in China, together holding around 15% of China CRO market.

WuXi AppTec is the largest local CRO player in China, making up about 10% of China CRO market; Hangzhou Tigermed Consulting Co., Ltd. is the only local CRO company listed in China, whose revenue has increased at a rate of above 30% annually over the last three years; Asymchem Inc. takes medical CMO as primary business, with its revenue arriving at RMB 542.8 million in 2013, and has embarked on IPO.

In order to share resources and improve overall competitiveness, some Chinese CRO companies are realizing mutual development by creating alliances, such as Alliance of Biotechnology Outsourcing (or ABO, including 38 companies such as Sino Biological Inc. and Pharmaron). In 2013, the revenue of ABO topped RMB 2 billion, up 11% from a year ago, of which RMB 1 billion came from international services.

China Contract Research Organization (CRO) Industry Report 2013-2016 highlights the following:

- ✘ Status quo, market size, competitive landscape, market characteristics and trend of China CRO industry;
- ✘ International environment, industry environment and policy environment of China CRO industry;
- ✘ Operation, development in China and outlook of 5 global and 9 Chinese CRO companies.



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