

# China Chemical Pharmaceutical Industry Report, 2013-2016

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## **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.

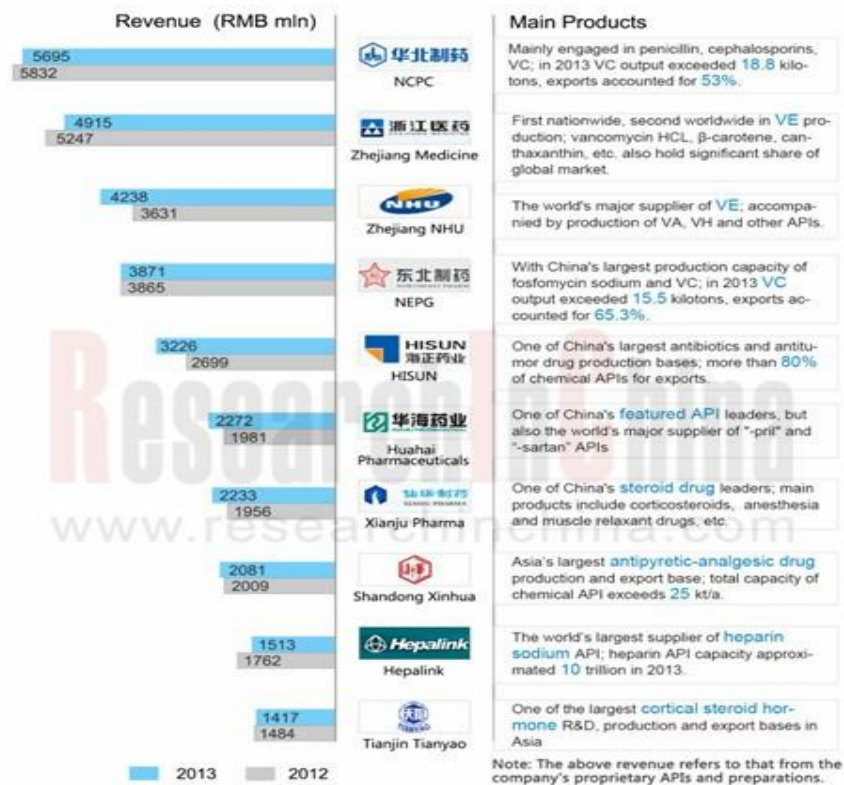
## Abstract

Chemical pharmaceutical consists mainly of chemical drug preparation and active pharmaceutical ingredient (API), and the gross margin of chemical drug preparation industry is generally higher than that of the API over the same period. In 2013, China chemical drug preparation industry and China API industry recorded revenue of RMB 573.1 billion and RMB 382 billion, with gross margin of 35%-40% and 20%, respectively.

China is a big producer of chemical APIs, capable of producing about 1,600 varieties of APIs. China ranks first worldwide in output of several bulk APIs including penicillins, vitamins and antipyretic analgesics, and holds a significant share of the featured APIs like statins, prils, sartans in the world. China produced 2.709 million tons of chemical APIs in 2013.

Although China is the world's leading chemical APIs supply region, the concentration of China chemical APIs industry is rather low due to numerous categories of APIs and limited overall strength of domestic enterprises, which occupy an important place only in single or a few categories of pharmaceuticals market. In addition, under the pressure of both environmental protection and industrial upgrading, many large APIs companies in the country are transforming into drug preparation companies through means such as R&D and acquisitions.

Revenue and Main Products of Major Chemical API Companies in China, 2012-2013



Source: China Chemical Pharmaceutical Industry Report, 2013-2016; ResearchInChina

North China Pharmaceutical Group Corp. (NCPC) and Northeast Pharmaceutical Group Co., Ltd. are major suppliers of antibiotic and VC APIs in China, with supply of VS reaching around 20,000 tons each. In 2013, the two companies' total revenue from APIs and their revenue from drug preparation business reached RMB 5.695 billion and RMB 3.871 billion, respectively.

Zhejiang Medicine Co., Ltd. and Zhejiang NHU Co., Ltd. are the leading manufacturers of VE products around the globe, with raw materials (vital ingredients for the production of VE are limited raw materials: isophytol and trimethylhydroquinone for VE being produced by themselves. However, the two companies' development is constrained due to a weak global demand for VE, of which Zhejiang Medicine reported revenue of RMB 4.915 billion from pharmaceutical business (APIs+ preparation), down 6.3% year on year.

Zhejiang Hisun Pharmaceutical Co., Ltd. and Zhejiang Huahai Pharmaceuticals Co., Ltd. are the key suppliers of featured APIs in China, of which the former specializes in antineoplastic and cardiovascular products, and the latter, which obtains three certificates from EDQM in 2013, is a major global supplier of prils and sartans APIs. In 2013, the two companies' total revenues from APIs and drug preparation business were RMB 3.226 billion and RMB 2.272 billion, rising by 19.5% and 14.7% from the previous year, respectively.

Zhejiang Xianju Pharmaceutical Co., Ltd. and Tianjin Tianyao Pharmaceuticals Co., Ltd. are the leading suppliers of hormone APIs, of which the former has been aggressively expanding into downstream drug preparation business. In the context of stricter environmental standards and rising costs of raw materials, developing the downstream will undoubtedly ensure competitiveness of the company. In 2013, Xianju Pharmaceutical posted total revenue of RMB 2.233 billion from APIs and preparation business, up 16.2% against the prior year. Also in 2013, the company acquired three EDQM certificates for its APIs.

China Chemical Pharmaceutical Industry Report, 2013-2016 highlights the following:

- ✘ Development status quo, supply and demand, regional structure and trend of global chemical pharmaceutical industry;
- ✘ Development status quo, competitive landscape, import and export and forecast of China chemical pharmaceutical industry;
- ✘ Development status quo, competitive landscape and import and export of China chemical pharmaceutical segments, including vitamins, antibiotics, antipyretic analgesics, antineoplastics and cardiovascular and cerebrovascular;
- ✘ Operation and prospects of 20 Chinese chemical APIs and preparation companies.

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- 1.2 Industry Chain

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- 2.2 Supply and Demand
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