



Global and China Monoclonal Antibody Industry Report, 2014-2019

Oct. 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

Despite world-wide economic downturn and great changes in exchange rate, benefiting from robust market demand, global monoclonal antibody market size exceeded USD 80 billion in 2013, still one of biotech drugs with the fastest CAGR in recent years.

Global blockbuster monoclonal antibody agents are still concentrated in Roche (Genentech), Amgen, AbbVie (Abbott), Johnson & Johnson, Novartis, etc. In 2013, the top 10 best-selling monoclonal antibody agents (Humira, Remicade, Enbrel, Rituxa, Avastin, Herceptin, Lucentis, Synagis, Prolia/Xgeva and Erbitux, in order) mostly came from these companies mentioned above. Global sales of these ten monoclonal antibody agents totaled about USD 58.1 billion in 2013, and are predicted to amount to USD 64.1 billion in 2014.

These companies construct mature monoclonal antibody R&D platform, have unparalleled technical advantages in a series of processes including the selection of target gene, genetic sequencing, construction of monoclonal antibody structure and industrialized production, and are well-capitalized (R&D costs of these companies accounted for 15%-20% of revenue during the same period.). It is expected that they will keep a leading position in global monoclonal antibody market over the next five to ten years.

In Sept. 2014, Opdivo (nivolumab) of Bristol-Myers Squibb was accepted for priority review by FDA and EMA. The indication of the drug is unresectable or metastatic melanoma. In the same month, KEYTRUDA (pembrolizumab) under Merck became the first FDA-approved Anti-PD-1 therapy, which can be used for advanced melanoma.

In Apr. 2014, Janssen under Johnson & Johnson announced the FDA had approved SYLVANT (siltuximab) for the treatment of patients with multicentric Castleman's disease (MCD) who are human immunodeficiency virus (HIV) negative and human herpesvirus-8 (HHV-8) negative. Lilly's CYRAMZA (ramucirumab) became first FDA-approved treatment for with advanced gastric cancer or gastroesophageal junction (GEJ) adenocarcinoma with disease progression on or after prior chemotherapy.

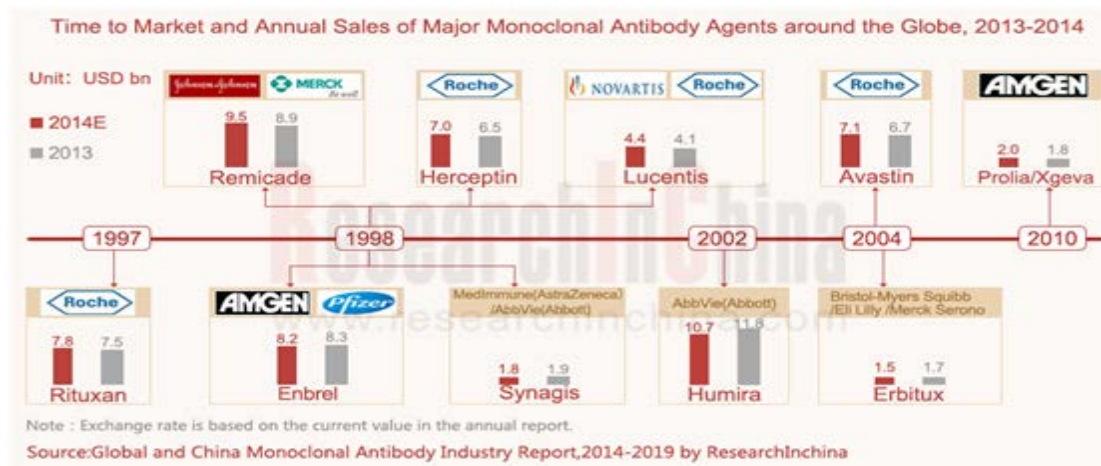
The Chinese monoclonal antibody market developed rapidly in recent years, with market size recording a CAGR of 38.9% during 2010-2013. There are nine domestic monoclonal antibody agents introduced to the market, such as Shanghai CP Guojian Pharmaceutical's Nimotuzuma and Biotech Pharm's recombinant humanized anti-CD25 monoclonal antibody. However, the market is dominated by imported agents like Rituximab, Trastuzumab, Infliximab and Bevacizumab, which account for more than 70%.

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However, in Aug. 2014, Hisun Pharm received notice from SFDA on applying for production field inspection for Recombinant Human Tumor Necrosis Factor Receptor Type II - Antibody Fusion Protein, which is expected to be introduced to the market by the end of 2014. Then supply capacity of domestic monoclonal antibody agents will be further enhanced.

With advancement of monoclonal antibody technology, incoming expiry date for patents of some blockbuster monoclonal antibody agents and bright future for monoclonal antibody, Livzon Pharmaceutical Group, Walvax Biotechnology, Hualan Biological Engineering, Shanghai Fosun Pharmaceutical and other companies invested heavily to enter monoclonal antibody market, and multiple products have entered stage of pre-preclinical or clinical research.

In Sept. 2014, Hualan Biological Engineering submitted clinical applications for its three monoclonal antibody generic drugs, namely, trastuzumab, bevacizumab and rituximab; In Aug. 2014, Walvax Biotechnology's recombinant anti-tumor necrosis factor- α fully human monoclonal antibody injection obtained clinical trial permission issued by Korean Food and Drug Administration (KFDA); In Apr. 2014, Shanghai Fosun Pharmaceutical formally received clinical trial permission approved and issued by CFDA for recombinant human-mouse chimeric anti-CD20 monoclonal antibody injection (rituximab monoclonal antibody genetic drug).



1. Overview of Monoclonal Antibody Industry

- 1.1 Definition
- 1.2 Classification
- 1.3 Technological Development

2. Overview of Global Monoclonal Antibody Industry

- 2.1 Status Quo
- 2.2 Market Size
- 2.3 Competitive Landscape
- 2.4 Development Prospect and Prediction
 - 2.4.1 Market Size
 - 2.4.2 Competitive Landscape
 - 2.4.3 R&D Trend

3. Chinese Monoclonal Antibody Market

- 3.1 Status Quo
- 3.2 Market Size
- 3.3 Market Segments
 - 3.3.1 Rituximab/Rituxan
 - 3.3.2 Trastuzumab/Herceptin
 - 3.3.3 Cetuximab/Erbitux
 - 3.3.4 Nimotuzumab/Infilixma
 - 3.3.5 Bevacizumab
 - 3.3.6 Recombinant Human Tumor Necrosis Factor Receptor Type II - Antibody Fusion Protein

- 3.4 Competitive Landscape
- 3.5 Development Prospect

4. Key Foreign Monoclonal Antibody Agent Enterprises

- 4.1 Roche Pharmaceuticals
- 4.2 Johnson & Johnson
- 4.3 Merck
- 4.4 Novartis
- 4.5 AbbVie
- 4.6 Amgen

5. Key Chinese Monoclonal Antibody Agent Enterprises

- 5.1 Shanghai Lansheng States Kin Pharmaceutical Co., Ltd.
 - 5.1.1 Profile
 - 5.1.2 Shanghai CP Guojian Pharmaceutical Co., Ltd.
 - 5.1.3 Shanghai Zhangjiang Biotech Co., Ltd.
 - 5.1.4 Shanghai CP GuoJian Biotech Academy
 - 5.1.5 Shanghai Guosheng Pharmaceutical Co., Ltd.
- 5.2 Beijing Biotech Pharmaceutical Co., Ltd.
 - 5.2.1 Profile
 - 5.2.2 Competitive Advantages
 - 5.2.3 Development Prospect
- 5.3 Chengdu Huasun Group Co., Ltd.
 - 5.3.1 Profile

- 5.3.2 Chengdu Huasun Biotech Co., Ltd.
- 5.4 Shanghai Medipharm Biotech Co., Ltd.
 - 5.4.1 Profile
 - 5.4.2 Monoclonal Antibody Business
- 5.5 Zhejiang Hisun Pharmaceutical Co., Ltd.
 - 5.5.1 Profile
 - 5.5.2 Monoclonal Antibody Business
- 5.6 Yunnan Walvax Biotechnology Co., Ltd.
 - 5.6.1 Profile
 - 5.6.2 Monoclonal Antibody Business
- 5.7 Shanghai Fosun Pharmaceutical (Group) Co., Ltd.
 - 5.7.1 Profile
 - 5.7.2 Monoclonal Antibody Business
- 5.8 Beijing SL Pharmaceutical Co., Ltd.
 - 5.8.1 Profile
 - 5.8.2 Monoclonal Antibody Business
- 5.9 Shenzhen Main Luck Pharmaceuticals Inc.
 - 5.9.1 Profile
 - 5.9.2 Monoclonal Antibody Business
- 5.10 Huahai Pharmaceutical Co., Ltd.
 - 5.10.1 Profile
 - 5.10.2 Monoclonal Antibody Business
- 5.11 Livzon Pharmaceutical Group Inc.

6. Summary and Forecast

- 6.1 Comparison between Domestic and Foreign Companies
- 6.2 Market Forecast

- Composition of Monoclonal Antibody Agents Worldwide by Type, 2013
- Technological Level of Monoclonal Antibody Agents in Developed Countries of Europe and America
- Targets of Some Monoclonal Antibody Agents Approved for Marketing by FDA by Sept. 2014
- R&D Fields of Therapeutic Antibody around the Globe, 2004 & 2013
- Sales of Monoclonal Antibody Agents Worldwide, 2009-2014
- M&A Events Related to Monoclonal Antibody Worldwide by Sept. 2014
- Time to Market and Annual Sales of Major Monoclonal Antibody Agents around the Globe, 2011-2014
- R&D Investment of Major Biopharmaceutical Companies Worldwide, 2009-2014
- Expiration Date of Major Monoclonal Antibody Patents Worldwide
- Competitive Analysis of Enbrel on American and Canadian Markets
- Research on New Indications of Some Monoclonal Antibody Products in the World, 2013-2014
- Several Cooperative Projects of Monoclonal Antibody Enterprises around the Globe, 2012-2014
- Monoclonal Antibody Agents Approved for Marketing in China by Sept. 2014
- Progress of Research on Some Monoclonal Antibody Agents in China, 2014
- Technological Level Comparison of Monoclonal Antibody Agents at Home and Abroad
- Sales of Monoclonal Antibody Agents in China, 2010-2014
- Purchase Amount of Major Monoclonal Antibody Agents in Typical Hospitals of 22 Cities in China, 2009-2013
- Purchase Amount of Rituximab in Sample Hospitals of China and YoY Growth, 2008-2013
- Purchase Amount of Rituximab in Typical Hospitals of Three Major Cities in China, 2009-2013
- Purchase Amount of Trastuzumab in Sample Hospitals of China, 2009-2013
- Purchase Amount of Trastuzumab in Typical Hospitals of Three Major Cities in China, 2009-2013
- Purchase Amount of Cetuximab in Sample Hospitals of China, 2009-2013
- Purchase Amount of Cetuximab/Erbitux in Typical Hospitals of Three Major Cities in China, 2009-2013
- Purchase Amount of Nimotuzumab in Hospitals of Three Major Cities in China, 2010-2013
- Purchase Amount of Bevacizumab/Avastin in Typical Hospitals in China, 2011-2013

- Purchase Amount of Recombinant Human Tumor Necrosis Factor Receptor Type II - Antibody Fusion Protein in Sample Hospitals of China and YoY Growth, 2009-2013
- Purchase Amount of Recombinant Human Tumor Necrosis Factor Receptor Type II - Antibody Fusion Protein in Hospitals of Three Major Cities in China, 2010-2013
- Price Comparison of Yisaipu, Qiangke and Enbrel in 2014H1
- Death Causes Composition of Rural Residents in China, 2012
- Death Causes Composition of Urban Residents in China, 2012
- Monoclonal Antibody Products Covered by Local Medical Insurance in China, 2014
- Some Clinical Monoclonal Antibody Products in China by Sept. 2014
- Some Listed Companies and Projects Investing in Monoclonal Antibody Industry in China, 2010-2014
- Major M&A Cases of Roche, 1990-2014
- Revenue and Net Income of Roche, 2008-2014
- Revenue Breakdown of Roche (by Business), 2010-2014
- Pharmaceutical and Diagnostic Revenue Breakdown of Roche (by Application), 2012-2013
- Pharmaceutical and Diagnostic Revenue Breakdown of Roche (by Application), 2014H1
- Roche's Revenue Breakdown and Percentage (by Region), 2012-2013
- Pharmaceutical and Diagnostic Revenue Breakdown Roche (by Region), 2013
- Pharmaceutical and Diagnostic Revenue Breakdown Roche (by Region), 2014H1
- R & D Costs of Roche (by Business), 2011-2014
- Some Products Approved for Marketing of Roche by the End of 2013
- Global Sales of Major Monoclonal Antibody Products of Roche (Genentech), 2010-2013
- Sales of Roche's Monoclonal Antibody Products (by Region), 2011-2014
- Some Products being Developed of Roche by Jul. 24, 2014
- Roche's Pharmaceutical Sales and YoY Growth in China, 2010-2014
- Roche's Diagnostic Sales and YoY Growth in China, 2010-2014

- Roche's Main Subsidiaries in China
- Sales of Roche's Rituximab/Rituxan in China, 2009-2013
- Sales of Roche's Herceptin/Trastuzumab in China, 2009-2013
- Sales of Bevacizumab/Avastin in China, 2011-2013
- Total Revenue and Net Income of Johnson & Johnson, 2009-2014
- Total Revenue Breakdown of Johnson & Johnson (by Product), 2009-2014
- Total Revenue Structure of Johnson & Johnson (by Product), 2009-2014
- Pharmaceutical Revenue Breakdown of Johnson & Johnson (by Product), 2011-2013
- R&D Costs and % of Total Revenue of Johnson & Johnson, 2009-2014
- Monoclonal Antibody Products of Johnson & Johnson
- Global Monoclonal Antibody Sales of Johnson & Johnson, 2009-2014
- Johnson & Johnson's Enterprises in China and Main Products
- China's Import Value of Infliximab, 2010-2013
- Revenue and Net Income of Merck, 2009-2014
- Revenue Breakdown of Merck (by Product), 2011-2013
- R&D Costs and % of Total Revenue of Merck, 2009-2014
- Progress of Merck's Research Projects by Jul. 2014
- Sales of Infliximab/Remicade of Merck, 2011-2014
- Revenue and Operating Income of Novartis, 2009-2014
- Revenue Breakdown of Novartis (by Business), 2010-2014
- Revenue Breakdown of Novartis (by Region), 2011-2014
- R&D Costs and % of Total Revenue of Novartis, 2009-2014
- Novartis' Monoclonal Antibody Products and Their Sales, 2011-2014
- Novartis' Subsidiaries in China
- Purchase Amount of Basiliximab in Typical Hospitals of 22 Cities in China, 2010-2013

- Sales of Lucentis in China, 2012-2013
- Main Sales Regions and Indications of HUMIRA
- Revenue Breakdown of Abbvie (by Product or Region), 2011-2013
- R&D Costs and % of Total Revenue of Abbvie (by Quarter), 2013-2014
- R&D Costs of Abbvie, 2009-2014
- Abbvie's Monoclonal Antibody Products and Their Sales, 2012-2014
- Global Adalimumab Sales, 2007-2014
- Global Synagis Sales of Abbvie, 2012-2014
- Purchase Amount of Adalimumab in Typical Hospitals of 22 Cities in China, 2010-2013
- Revenue and Net Income of Amgen, 2009-2014
- Revenue Breakdown of Amgen (by Product), 2009-2014
- Revenue Breakdown of Amgen (by Region), 2009-2014
- R&D Costs and % of Total Revenue of Amgen, 2008-2014
- Amgen's Products Being Developed by Jun. 2014
- Amgen's Market-oriented Monoclonal Antibody Products by Jun. 2014
- Revenue of Amgen's Monoclonal Antibody Products Sold, 2009-2014
- Revenue Breakdown of Amgen ENBREL (by Region), 2009-2014
- ENBEL's Patent Term
- Similar Competitive Products of ENBEL
- Revenue Breakdown of Panitumumab (by Region), 2009-2014
- Panitumumab's Patent Term
- Similar Competitive Products of Panitumumab
- Revenue Breakdown of Amgen's Denosumab (by Region), 2010-2014
- Denosumab's Patent Term
- Similar Competitive Products of Denosumab

- Revenue and Net Income of Shanghai CP Guojian, 2008-2010
- Some Monoclonal Antibody Products Being Developed of Shanghai CP Guojian, by Oct. 2014
- Some Monoclonal Antibody Products Being Developed of Shanghai Zhangjiang Biotech
- Monoclonal Antibody Research Projects of Beijing Biotech Pharmaceutical
- Revenue and Operating Income of Chengdu Huasun Group, 2009-2014
- Revenue and Net Income of Chengdu Huasun Biotech, 2007-2013
- Revenue and Operating Income of Zhejiang Hisun Pharmaceutical, 2009-2014
- Industrial Layout of Yunnan Walvax Biotechnology
- Revenue and Operating Income of Yunnan Walvax Biotechnology, 2009-2014
- Monoclonal Antibody Technical Indicators of Shanghai Fengmao
- R&D Progress of 5 Categories of Monoclonal Antibody Generic Drugs of Shanghai Fengmao by Sept. 2014
- Monoclonal Antibody Products Being Developed and Progress of Genor Biopharma
- Revenue and Operating Income of Shanghai Fosun Pharmaceutical, 2008-2013
- Revenue and Operating Income of Beijing SL Pharmaceutical, 2009-2014
- Revenue and Operating Income of Huahai Pharmaceutical, 2009-2014
- Revenue and Operating Income of Livzon Pharmaceutical Group, 2009-2014
- Revenue and Operating Income of Hualan Biological Engineering, 2009-2014
- Investment of Some Domestic and Foreign Enterprises in Monoclonal Antibody Field in Recent Years
- Global Monoclonal Antibody Market Size and YoY Growth, 2013-2019E
- Sales and Patent Expiration of Global Top Six Monoclonal Antibody Agents
- Chinese Monoclonal Antibody Market Size and Its Share in the Global Market, 2013-2019E

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