



China Heparin Industry Report, 2014-2017

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

As the world's major heparin API producer and exporter, China boasts enormous raw materials, which provides a strong support for the production of China's heparin products. In 2013, the live pigs raised in China could manufacture 27.9 trillion units of heparin crude products. And in H1 2014, the live hogs in China may produce 14.09 trillion units of heparin crude products, up 5.6% on a year-on-year basis.

In 2011-2013, affected by the economic downturn in Europe and America, the global heparin preparations market continued to drop, with the sales volume of main heparin preparations brands virtually presenting decline, thus dragging down the exports of China's heparin products. In 2013, China exported approximately 13.68 trillion units of heparin and its salts, falling 5.9% year on year, and the figure edged down 0.6% from a year earlier to around 9.32 trillion units in Jan.-Aug. 2014.

Capacity of Major Heparin API Companies in China as of June 2014

Unit: Billion Units



Source: China Heparin Industry Report, 2014-2017

The major global heparin API suppliers, including Hepalink, Nanjing King-friend, Dongcheng Biochemicals, Qianhong Bio-pharma, and Changshan Biochemical Pharmaceutical, have been among the top 4 heparin exporters in China for many years, together accounting for over 60% of China's total heparin exports. In response to the impact from international markets, enterprises are stepping up efforts to figure out the solutions, with Hepalink expanding its market share of heparin crude products via M&As overseas. By contrast, the enterprises like Qianhong Bio-pharma, Dongcheng Biochemicals, and Changshan Biochemical Pharmaceutical have accelerated the R&D into and production of low molecular weight heparin preparations. And Nanjing King-friend is aggressively seeking to expand capacity through IPO.

Although the leading heparin enterprises planned to increase capacity and improve the heparin industry chain a few years ago, yet quite a few heparin API projects that had been scheduled to go into operation in 2014 were delayed successively due to depressed market demand or improved technical standards, these projects including Dongcheng Biochemicals' 32t/a Crude Heparin Sodium Project and Qianhong Bio-pharma's Heparin API and Preparations Expansion Project.

In terms of the proposed/ongoing projects, however, it is projected that the heparin API in China will achieve an additional capacity of more than 20 trillion units by 2015, when China's total capacity will exceed 30 trillion units, accounting for roughly 80% of the global demand.

Given that America's economy showed signs of recovery and the European economy did not continue to deteriorate, we foresee that the market size of the global heparin API and preparation market will bounce back in 2014-2017, when China's heparin industry, heparin API in particular, will see an improved degree of prosperity, thus further releasing new capacity.

China Heparin Industry Report, 2014-2017 mainly deals with the followings:

- Global heparin supply & demand, competitive landscape and forecast, etc.;
- Development, access barriers, supply & demand, competitive landscape, import & export, and development forecast, etc. of China heparin API industry;
- Development, supply & demand, competitive landscape and development forecast, etc. of China heparin preparations industry;
- Operation, Heparin Business, development prospect, etc. of 7 heparin enterprises, including Hepalink, Nanjing King-friend, Qianhong Bio-pharma, Dongcheng Biochemicals, as well as Changshan Biochemical Pharmaceutical.

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