



China Pharmaceutical Glass Packaging Industry Report, 2014-2017

Jun. 2015

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

In recent years, advances in new healthcare reform have boosted market demand from China pharmaceuticals industry and driven growth in the demand from pharmaceutical packaging industry. In 2014, the Chinese pharmaceutical packaging market reached RMB72 billion, up 10.6% from a year earlier.

As a traditional form of pharmaceutical packaging bottle, pharmaceutical glass bottle took up a large proportion of the Chinese pharmaceutical packaging market in initial development stage of the packaging market. However, affected by negative factors like the substitution of new packaging materials (plastics and aluminum foil) and continuous decline in purchase prices of packaging materials quoted by pharmaceutical companies due to reform in medical system, China pharmaceutical glass packaging industry has developed sluggishly, with its market share standing at estimated 45% or so for the time being.

Due to low barrier to entry, China's pharmaceutical glass industry has been large but not strong as a whole, with low and medium-end products struggling with huge overcapacity and high-end products relying on imports. At present, developed countries around the world all use level I waterproof neutral borosilicate glass, while China still mostly adopts low borosilicate glass, soda-lime glass and almost domestically unique "semi-neutral borosilicate pharmaceutical glass" (its chemical stability cannot meet neutral requirements; the heavy metal content in glass is not defined clearly; dimensions are not accurate).

The production of neutral borosilicate glass faces dual barriers of raw materials and tube-making technology, which have been still controlled by foreign companies so far, resulting in persistently high production costs and limited applications. In 2012, German Schott AG, a world well-known pharmaceutical glass company, together with Zhejiang Xinkang Pharmaceutical Glass Co., Ltd., announced to establish a joint venture that would engage in pharmaceutical packaging, an important sign marking localization of pharmaceutical glass. But, even for the joint venture, it has to buy glass tube produced by Schott abroad.

However, the defect of low borosilicate glass easily flaking causes safety risks to health of users, so it is imperative to promote neutral borosilicate glass. Market demand for neutral borosilicate glass pharmaceutical containers has been growing by more than 20% over the past two years. More and more pharmaceutical players started to use neutral borosilicate glass, especially for high value-added products. For example, Buchang Pharma employs neutral borosilicate glass packaging materials for all its Danhong Injections, and some innovative R&D-oriented pharmaceutical companies like Jiangsu Hengrui Medicine Co., Ltd. also adopt neutral borosilicate glass.

With years of development and competition, the Chinese pharmaceutical glass business market still finds a relatively low level of concentration, but competitively leading companies have emerged in some market segments, especially in prefilled syringe market.

There are only five companies that have obtained assemblages for prefilled syringes in China, i.e., foreign-funded BD and Gerresheimer and domestic Shandong Weigao Group Medical Polymer, Shandong Zibo Minkang Pharmaceutical Packing Co., Ltd. and Shandong Pharmaceutical Glass Co., Ltd.

By virtue of first-mover advantage and developed marketing network, Shandong Weigao Group Medical Polymer sold about 85.85 million prefilled syringes in 2014, accounting for more than 50% of the market in China, followed by foreign brands such as BD and Gerresheimer with market share of about 25%, and Zibo Minkang Pharmaceutical and Shandong Pharmaceutical Glass (the remaining). In addition, Shandong Weigao Group Medical Polymer still plans to implement the 50-million prefilled syringes project, which is expected to further raise the company's share in prefilled system market.

China Pharmaceutical Glass Packaging Industry Report, 2014-2017 highlights the followings:

- ✘ Status quo, market size, import & export, downstream demand and development forecast of China pharmaceutical glass industry;
- ✘ Status quo, competitive landscape and price of China prefilled syringe industry;
- ✘ Operation, pharmaceutical glass business and development prospects of 4 global and 6 domestic pharmaceutical glass packaging companies.

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