



**China Contract Research Organization
(CRO) Industry Report, 2015-2018**

Jul. 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

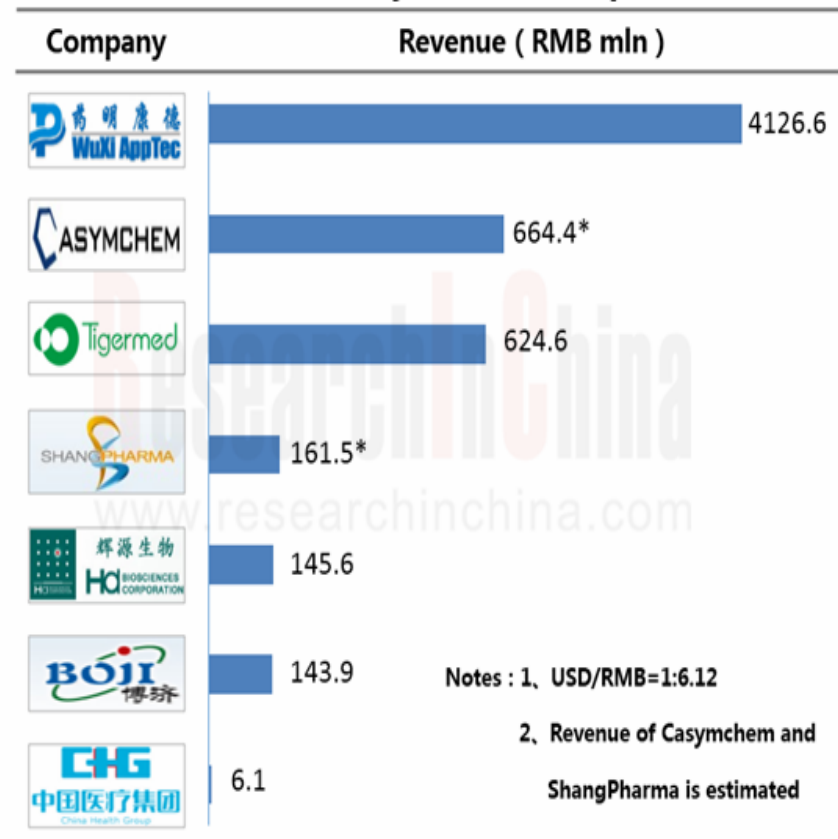
In recent years, China's contract research organization (CRO) industry has developed rapidly, with the market size rising from RMB8.5 billion in 2007 to RMB42.6 billion in 2014, registering a CAGR of 25.9%. With so many favorable policies, especially when a number of well-known proprietary drugs are about to expire, China's CRO market size is expected to continue to grow by around 20% in the years ahead, to an estimated RMB 83.2 billion by 2018.

At present, some European and American CRO enterprises represented by Quintiles and Covance have penetrated the Chinese market by establishing branches or through acquisition and cooperation. These foreign giants, which occupy the majority of China's CRO market share, are driving the industry to develop toward standardization.

There are more than 500 Chinese CRO enterprises, such as WuXi AppTec, Tigermed Consulting, Boji Medical Biotechnological, and HD Biosciences, which have a relatively large scale and develop very well. In 2014, WuXi AppTec represented a 9.69% market share while Tigermed Consulting and Boji Medical Biotechnological accounted for 1.47% and 0.34%, respectively.

As a leader in China's CRO industry, WuXi AppTec posted revenue of RMB4.1266 billion (equivalent to USD674.3 million) in 2014, up 16.6% from a year earlier. In recent years, the company has seen rapid expansion by acquiring AppTec, ABGENT, Shanghai Medkey Med-Tech Development Co., and NextCODE Health.

Revenue of China Major CRO Enterprises, 2014



Source: China Contract Research Organization (CRO) Industry Report, 2015-2018 by ResearchInChina

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Tigermed Consulting is a CRO company that specializes in the services related to clinical trials and clinical research. In 2014, the company recorded RMB624.6 million in revenue, up as high as 85.6%. In August 2012, the company completed its IPO, and then continuously strengthened its competitiveness through M&A and investment in subsidiaries. During 2013-2014, Tigermed Consulting founded Fantastic Bioimaging, Shanghai Tigermed Consulting Co., Hangzhou Talent MedCinsultant, and Tigermed-Intelli PV Ltd., and purchased BDM and Frontage Labs. In 2015, the company announced a proposed acquisition of Beiyi Renzhi (Beijing) Medical Technology Development Co. and DreamCIS Inc, a South Korean company.

Boji Medical Biotechnological, a comprehensive CRO company, was publicly traded on GEM of Shenzhen Stock Exchange in April 2015. As of the end of 2014, it had provided an accumulated more than 400 clinical research services and over 200 preclinical research services. In recent years, it has begun to focus on international expansion, successively undertaking the service projects of some overseas companies including Sweden's Astrom Research International and South Korea's Hyundai Pharmaceutical.

China Contract Research Organization (CRO) Industry Report, 2015-2018 is mainly all about the following:

- ✘ Status quo, related policies, market size, competitive landscape, development trends, etc. of China's CRO industry;
- ✘ Development environment of China's CRO industry, including international environment, industry environment, and regional market;
- ✘ Operation, R&D and investment, development in China, etc. of 5 global and 13 Chinese CRO companies;
- ✘ Development prediction of China's CRO industry as well as operation of major enterprises.

1. Overview of Pharmaceutical Outsourcing

- 1.1 Definition
- 1.2 Classification
- 1.3 CRO

2. Overview of China CRO Market

- 2.1 Status Quo
- 2.2 Related Policies
- 2.3 Market Size
- 2.4 Competitive Landscape
- 2.5 Development Trends
 - 2.5.1 Industrial Chain Improvement
 - 2.5.2 Internationalization of Qualification Certification Standard
 - 2.5.3 Development Driven by Technical Innovation

3. Development Environment of China CRO Industry

- 3.1 International Environment
 - 3.1.1 Development History
 - 3.1.2 Development Status
 - 3.1.3 Major Countries and Regions
- 3.2 Industry Environment
- 3.3 Regional Market
 - 3.3.1 Beijing
 - 3.3.2 Shanghai
 - 3.3.3 Chengdu

4. Key Chinese CRO Players

- 4.1 Wuxi AppTec
 - 4.1.1 Profile
 - 4.1.2 Operation

- 4.1.3 Revenue Structure
- 4.1.4 Gross Margin
- 4.1.5 Investment and Development
- 4.1.6 Forecast and Outlook
- 4.2 Hangzhou Tigermed Consulting Co., Ltd.
 - 4.2.1 Profile
 - 4.2.2 Operation
 - 4.2.3 Revenue Structure
 - 4.2.4 Gross Margin
 - 4.2.5 R&D and Investment
 - 4.2.6 Forecast and Outlook
- 4.3 Guangzhou Boji Medical Biotechnological Co., Ltd.
 - 4.3.1 Profile
 - 4.3.2 Operation
 - 4.3.3 Revenue Structure
 - 4.3.4 Gross Margin
 - 4.3.5 R&D and Investment
 - 4.3.6 Forecast and Outlook
- 4.4 ShangPharma Corp
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 Gross Margin
- 4.5 China Medical Technologies Inc.
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Gross Margin
 - 4.5.4 Development
- 4.6 Asymchem
 - 4.6.1 Profile
 - 4.6.2 Operation
 - 4.6.3 Revenue Structure

- 4.6.5 R&D and Investment
- 4.6.6 Forecast and Outlook
- 4.7 HD Biosciences
- 4.8 Porton
- 4.9 Others

5. Key Foreign CRO Companies

- 5.1 Covance
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Revenue Structure
 - 5.1.4 Gross Margin
 - 5.1.5 Development in China
- 5.2 Parexel
- 5.4 Charles River
- 5.5 PPD
 - 5.5.1 Profile
 - 5.5.2 Operation
 - 5.5.3 Revenue Structure
 - 5.5.4 Development in China

6. Development and Outlook


- 6.1 Industry Development Prediction
- 6.2 Operation of Major CRO Companies
 - 6.2.1 Revenue
 - 6.2.2 Net Income
 - 6.2.3 Gross Margin

- 
- Classification of Pharmaceutical Outsourcing
 - R&D Process of New Drugs
 - Research Application of New Drugs in China, 2010-2014
 - China's Policies on CRO Industry, 2001-2015
 - Market Size and YoY Growth of China's CRO Industry, 2007-2014
 - Layout of Major Global CRO Companies in Asia
 - Distribution of Major Foreign CRO Companies in China
 - Business Mode of Chinese CRO Companies
 - Market Share of China's CRO Industry by Company, 2014
 - R&D Costs of International Pharmaceutical Giants, 2009-2014
 - Sales of Global Top 10 Pharmaceutical Companies, 2014
 - Market Size and YoY Growth of Global CRO Industry, 2007-2014
 - Market Share of Global CRO Industry by Region, 2014
 - Revenue and Total Profit of Chinese Pharmaceutical Enterprises, 2010-2014
 - Revenue of Chinese Pharmaceutical Enterprises by Province, 2014
 - Major Regions and Characteristics of China's Pharmaceutical Industry,
 - Capital Transactions and Disclosed Amount of Biomedical Industry in Beijing, 2014
 - Revenue and YoY Growth of Enterprises under ABO Alliance, 2007-2014
 - Initiators of Zhongguancun CRO Alliance (Listed Randomly)
 - Platform Advantages of Zhangjiang Drug Valley
 - List of Major CRO Companies in Zhangjiang Drug Valley
 - Business Areas Distribution of WuXi AppTec
 - WuXi AppTec's Revenue and Net Income, 2010-2015
 - WuXi AppTec's Revenue Breakdown by Business, 2010-2015
 - WuXi AppTec's Revenue Structure by Business, 2010-2015

- WuXi AppTec's Revenue Breakdown by Region, 2010-2014
- WuXi AppTec's Revenue Structure by Region, 2010-2014
- WuXi AppTec's Gross Margin, 2010-2015
- WuXi AppTec's Gross Margin by Business, 2010-2015
- WuXi AppTec's Revenue and Net Income, 2013-2018E
- Revenue and Net Income of Tigermed Consulting, 2010-2015
- Tigermed Consulting's Revenue Breakdown by Business, 2013-2014
- Tigermed Consulting's Revenue Structure by Business, 2013-2014
- Tigermed Consulting's Revenue Breakdown by Region, 2010-2014
- Tigermed Consulting's Revenue Structure by Region, 2010-2014
- Tigermed Consulting's Gross Margin, 2010-2015
- Tigermed Consulting's Gross Margin by Region, 2010-2014
- Tigermed Consulting's R&D Costs and % of Total Revenue, 2011-2014
- Tigermed Consulting's Revenue and Net Income, 2014-2018E
- Boji Medical Biotechnological's Revenue and Net Income, 2011-2015
- Boji Medical Biotechnological's Revenue Breakdown by Business, 2011-2014
- Boji Medical Biotechnological's Revenue Structure by Business, 2011-2014
- Boji Medical Biotechnological's Revenue Breakdown by Region, 2011-2014
- Boji Medical Biotechnological's Gross Margin, 2011-2015
- Boji Medical Biotechnological's Gross Margin by Business, 2011-2014
- R&D Costs and % of Total Revenue of Boji Medical Biotechnological, 2011-2014
- Major Service Content of Boji Medical Biotechnological
- Boji Medical Biotechnological's Subsidiaries and Their Main Business
- Fundraising Projects of Boji Medical Biotechnological
- Revenue and Net Income of Boji Medical Biotechnological, 2014-2018E

- ShangPharma Corp's Revenue and Net Income, 2009-2014
- ShangPharma Corp's Gross Margin, 2009-2014
- Revenue and Net Income of China Medical Technologies, 2010-2015
- Gross Margin of China Medical Technologies, 2010-2015
- Asymchem's Revenue and Net Income, 2011-2014
- Asymchem's Revenue Breakdown by Business, 2011-2014
- Asymchem's Revenue Structure by Business, 2011-2014
- Asymchem's Gross Margin, 2011-2014
- Asymchem's R&D Costs and % of Total Revenue, 2011-2013
- Asymchem's Major Subsidiaries and Offices
- Asymchem's Orders by Type, 2011-2013
- Asymchem's Proposed Fundraising Project through IPO, May 2014
- Asymchem's Revenue and Net Income, 2013-2018E
- HD Biosciences' Revenue and Net Income, 2013-2014
- HD Biosciences' Total Assets and Liabilities, 2013-2014
- Porton's Revenue and Net Income, 2010-2015
- Porton's Revenue Breakdown by Region, 2010-2015
- Porton's Revenue Structure by Region, 2010-2014
- Porton's Gross Margin, 2010-2015
- Porton's Gross Margin by Region, 2010-2014
- Porton's R&D Costs and % of Total Revenue, 2012-2014
- Porton's Fundraising Project
- Porton's Revenue and Net Income, 2014-2018E
- Covance's Revenue and Net Income, 2009-2014
- Covance's Revenue Breakdown by Business, 2009-2014

- Covance's Revenue Structure by Business, 2009-2014
- Covance's Revenue Breakdown by Region, 2011-2014
- Covance's Revenue Structure by Region, 2011-2014
- Covance's Gross Margin, 2009-2014
- Parexel's Revenue and Net Income, 2009-2014
- Parexel's Revenue Breakdown by Business, 2009-2014
- Parexel's Revenue Structure by Business, 2009-2014
- Parexel's Revenue Breakdown by Region, 2009-2014
- Parexel's Revenue Structure by Region, 2009-2014
- Quintiles' Revenue and Net Income, 2010-2015
- Quintiles' Revenue Breakdown by Business, 2010-2015
- Quintiles' Revenue Structure by Business, 2010-2015
- Quintiles' Revenue Breakdown by Region, 2010-2015
- Quintiles' Revenue Structure by Region, 2010-2014
- Quintiles' Gross Margin, 2010-2015
- Charles River's Revenue and Net Income, 2010-2015
- Charles River's Revenue Breakdown by Business, 2013-2015
- Charles River's Revenue Structure by Business, 2013-2015
- Charles River's Revenue Breakdown by Region, 2011-2014
- Charles River's Revenue Structure by Region, 2011-2014
- Charles River's Gross Margin, 2010-2015
- PPD's Revenue and Net Income, 2008-2011
- PPD's Revenue Breakdown by Business, 2008-2011
- PPD's Revenue Structure by Business, 2008-2011
- Global Proprietary Drugs Having Expired or to Expire, 2014-2016

- 
- Market Share and YoY Growth Rate of China's CRO Industry, 2014-2018E
 - Revenue of Major Chinese CRO Companies, 2010-2014
 - Net Income of Major Chinese CRO Companies, 2010-2014
 - Net Profit Margin of Major Chinese CRO Companies, 2010-2014
 - Gross Margin of Major Chinese CRO Companies, 2010-2014

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