

China Heparin Industry Report, 2015-2018

Dec. 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

As the world's largest heparin API producer and exporter, China seizes about 80% share of the global heparin API market. After the explosive growth in 2008-2010, the stagnant international market and the improved standards for heparin export pulled down the export volume of China's heparin API during 2011-2013. From 2014 onwards, China has seen the export of heparin and its salts warm up. From January to October of 2015, China exported 123.2 tons of heparin and its salts, higher than 106.7 tons in the whole 2014; however, the average export price fell 30.7% year on year to USD3,945.6 / ton.

The major global heparin API suppliers, including Hepalink, Nanjing King-friend, Dongcheng Biochemicals and Qianhong Bio-pharma generated the combined capacity of over 20 trillion units in 2014; also, they have been among the top 4 heparin exporters in China for many years, together accounting for over 70% of China's total heparin exports.

Along with the intensified heparin API supply capacity and raised product grades, Chinese heparin preparation market size is constantly expanding, reaching about RMB5 billion in 2014. In April 2015, Ministry of Human Resources and Social Security of the People's Republic of China issued Circular on Adjusting and Standardizing Some Drugs Listed in Drug Catalog of National Basic Medical Insurance, Industrial Injury Insurance and Maternity Insurance to contain "enoxaparin sodium injection", "dalteparin sodium injection" and "nadroparin calcium injection" in the aforementioned catalog (previously only included in the medical insurance of some provinces and cities).

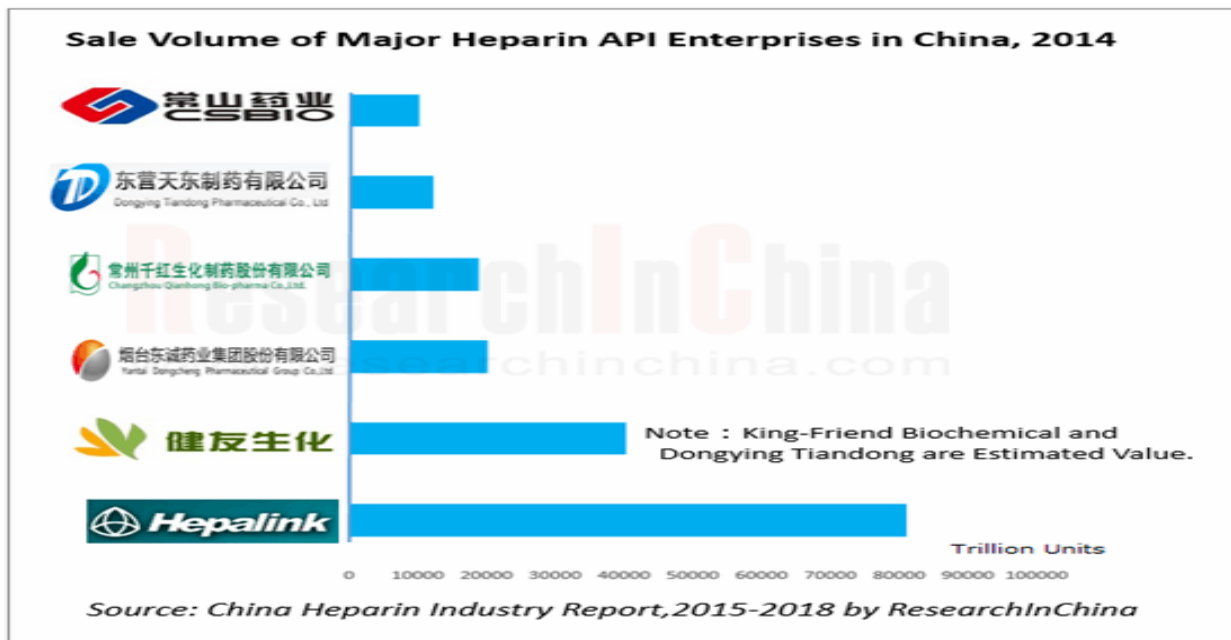
This move will undoubtedly stimulate the consumption of heparin preparations in China, especially low molecular weight heparin preparations. Chinese heparin preparation market size is expected to jump 27.9% year on year to RMB6.38 billion in 2015.

Based on the corporate development and positive prospects of heparin products, Hepalink, Nanjing King-friend, Dongcheng Biochemicals, Qianhong Bio-pharma, Changshan Biochemical Pharmaceutical and other companies have been either deploying or improving low molecular weight heparin API and preparation industries in recent years.

Nanjing King-friend has consistently ranked second in Chinese heparin API export market in recent years, and boasts the most diversified low molecular weight heparin products. In 2014, the company produced and sold about 4 trillion units of heparin API.

Meanwhile, it received new drug certifications on enoxaparin sodium API and preparations, dalteparin sodium API and preparations. It obtained an approval on nadroparin calcium API and preparations on May 13, 2015. In addition, Nanjing King-friend has a production line involved with 3000kg/a low molecular weight heparin (1000kg/a enoxaparin sodium, 1000kg/a dalteparin, 1000kg/a nadroparin calcium) under construction; the project is expected to be completed and put into operation in December 2017.

As one of the main suppliers of heparin API in China, Qianhong Bio-pharma has ranked fourth in exports in recent years. In 2014, the company's heparin API capacity amounted to 5.5 trillion units, but the annual output and sales volume only reached about 2 trillion units based on market considerations. In 2015, the company was granted with a drug registration approval on enoxaparin sodium API and preparations; its dalteparin passed the inspection by CFDA; its nadroparin API and preparations were recognized by new drug review in December, and will go into the production inspection stage. Besides, the company's ongoing heparin sodium preparation expansion project is expected to be completed in March 2016.



China Heparin Industry Report, 2015-2018 mainly deals with the followings:

- Global heparin supply & demand, competitive landscape and forecast, etc.;
- Policies, market situation, competitive landscape, import & export, and development forecast, etc. of China heparin industry;
- Operation, Heparin Business, development prospect, etc. of 7 heparin enterprises in China.

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