



**China Contract Research
Organization(CRO) Industry Report,
2017-2021**

Oct. 2017

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

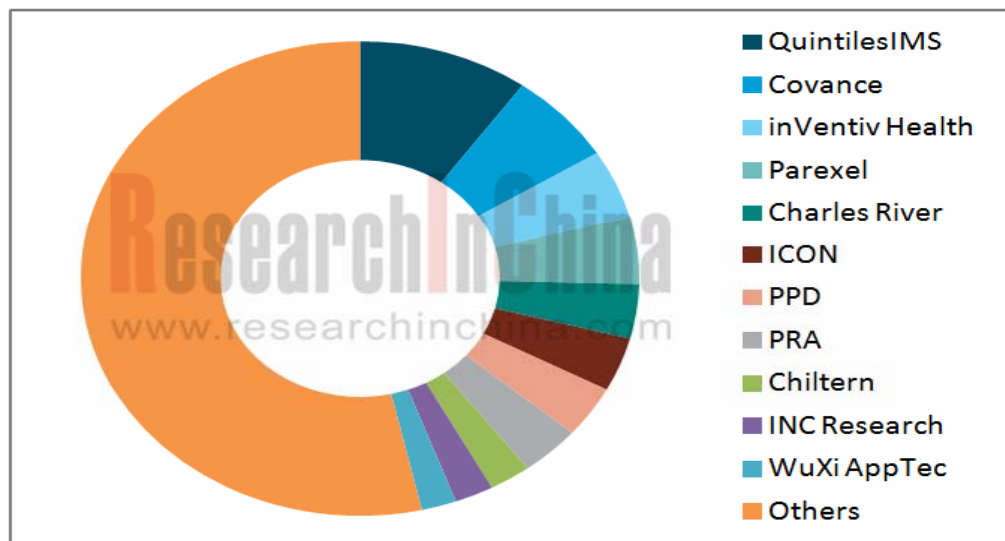
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Under the pressure from higher R&D costs, longer R&D cycle and lower R&D success rate in pharmaceutical industry worldwide, over 50 percent of pharmaceutical enterprises have had the development of new drugs assisted by CRO firms in recent years, stimulating the progression of global CRO industry which had a market size of USD31.7 billion in 2016.

There are more than 1,100 CRO companies around the world, led by QuintilesIMS, Covance, inVentiv Health, Charles River, Parexel, PPD, ICON and WuXi AppTec. Global top10 CRO firms hold a combined 45% or so market share for now.

Market Share of Major Competitors in Global CRO Market

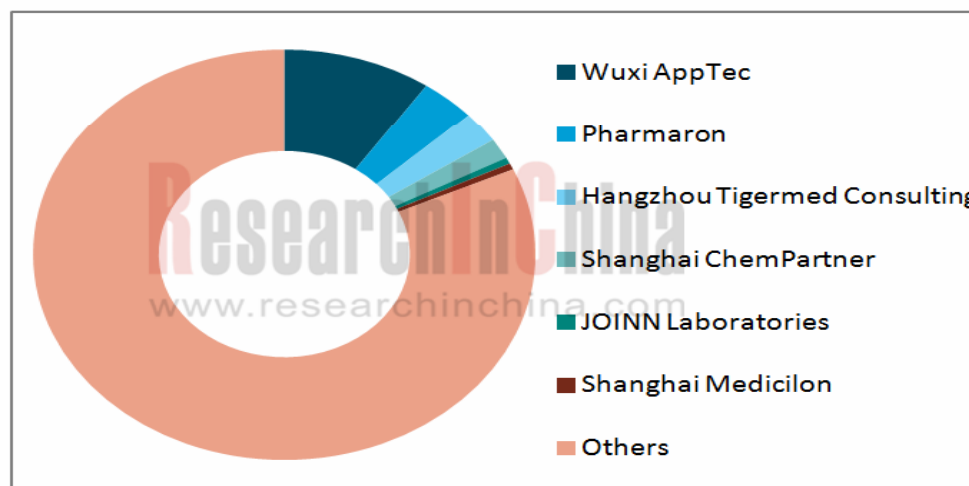


Source: Southern Medicine Economic Institute, ResearchInChina

China's great competitive edge over the developed countries in pharmaceutical R&D cost has attracted several large international pharmaceutical companies to build dozens of R&D centers here and fueled the development of CRO industry in China. With the scale of about RMB46.2 billion in 2016, the CRO industry in China will maintain a rapid growth rate over the next five years, hitting an estimated RMB116.5 billion in 2021, driven by pharmaceutical companies' more spending on R&D, an increase in the number of new drugs approved and favorable policies.

Leading Chinese CRO companies include WuXi AppTec, Pharmaron, Shanghai Medicilon, Shanghai ChemPartner, Hangzhou Tigermed Consulting, and JOINN Laboratories. WuXi AppTec is one of the most comprehensive service platforms integrating discovery, research and development of small-molecule chemical drugs with the strongest R&D strength and the largest (domestically) and a leading (globally) small-molecule pharmaceutical R&D service business. It occupied about 2% of the world's CRO market and 9.5% of the Chinese CRO market in 2016.

Chinese CRO Market Share by Enterprise, 2016



Source: Southern Medicine Economic Institute, ResearchInChina

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The CRO industry in China will present the following three trends:

- 1) Pharmaceutical enterprises represented by AvvVie, Novartis, GSK and Eli Lilly and Company have closed or are about to close or sell their R&D centers in China, and will rely more on CRO enterprises for new drug research activities. This will promote the development of CRO industry and be conducive to local CRO enterprises.
- 2) As the world economy picks up, pharmaceutical enterprises increase their R&D budget gradually, bringing global pharmaceutical R&D spending up to an estimated USD160 billion in 2021, including USD29.2 billion in China. This will drive the development of CRO industry from supply side.
- 3) Bright prospects of CRO industry and favorable policies in China have attracted enterprises represented by Dian Diagnostics, Xinjiang Baihuacun, Quantum Hi-Tech (China) Biological, and Xiamen Academy Of Building Research Group into the field, to some extent, promoting the development of CRO industry in China.

China Contract Research Organization (CRO) Industry Report, 2017-2021 highlights the followings:

- ◆ Overview of CRO industry (development course/background, market size, competitive landscape, etc.);
- ◆ Overview of CRO industry in China (development environment/status quo, market size, competitive landscape, development trends, etc.);
- ◆ Ten Chinese and six foreign companies (operation, revenue structure, gross margin, R&D investment, etc.)

1 Overview of Pharmaceutical Outsourcing

- 1.1 Definition
- 1.2 Classification
- 1.3 CRO

2 Evolution of Global CRO Industry

- 2.1 Development History
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- 2.3 Market Size
- 2.4 Competitive Landscape

3 Evolution of Chinese CRO Industry

- 3.1 Development Environment
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- 3.2 Status Quo
- 3.3 Market Size
- 3.4 Competitive Pattern
- 3.5 Development Trends
 - 3.5.1 Transnational Pharmaceutical Companies Shut Down and Have a Clearance Sale of Their Research Centers in China, which Favors Local Chinese Companies
 - 3.5.2 New Drug Approvals Increase and R&D Expenses Grow, Laying a Foundation for the Development of CRO Industry

- 3.5.3 The Amounting Pressure from R&D Costs Make Pharmaceutical Enterprises Rely More on CRO Companies for the Research and Development of New Drugs
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