China Pharmaceutical Distribution Industry Report, 2019-2025

June 2019

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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

China's pharmaceutical distribution industry has sustained steady growth over the years. In 2018, the market was worth RMB2,194.5 billion, a 9.6% rise from RMB2,001.6 billion (up by 8.4% YoY) in 2017, of which drug retailing market size ranged at RMB437.7 billion in 2018, compared with RMB400.3 billion (up by 9% YoY) in 2017.

By product, western medicine is prevailing in Chinese pharmaceutical distribution market, sweeping 73.2% of total sales in 2018; by region, the east and the central south of China take larger shares, a combined 62.1% in 2018.

In China, a competitive pattern has taken shape that national drug distributors led by Sinopharm, China Resources Pharmaceutical Group, Shanghai Pharmaceuticals and Jointown Pharmaceutical Group, and regional distribution companies such as Nanjing Pharmaceutical, Guangzhou Pharmaceuticals, Chongqing Pharmaceutical, Huadong Medicine, Sichuan Kelun Pharmaceutical, Zhejiang Int'l Group, Realcan Pharmaceutical, Guangzhou Liuzhou Pharmaceutical and Luyan Phapma, compete with each other.

By the end of 2018, there had been 13,146 drug wholesalers competing fiercely in China, showing a low market concentration. In 2018, the top 100 by operating revenue commanded 70.7% of China's pharmaceuticals market, and the first four leaders occupied 37.6%.

By the end of 2018, there had been 5,985 drugstore chains in possession of 463,200 retail stores in China, of which 242,560 were chain stores, taking up 52.4% of the total, up by 2 percentage points on an annualized basis; 88.3% of stores were directly run by retailers themselves; 72% were designated medical insurance stores.

In China, leading drug retail chains include Yunnan Hongxiang Yixintang Pharmaceutical Co., Ltd., Dashenlin Pharmaceutical Group Co., Ltd., LBX Pharmacy, Yifeng Pharmacy, Sinopharm, China Nepstar Chain Drugstore, Gansu Zhongyou Health Medicine Co., Ltd., Suzhou Quanyi Health Drugstore Chain Co., Ltd., Chongqing Tong Jun Ge Co., Ltd. and Yunnan Jianzhijia Health Drugstore Chain Co., Ltd., among which Chongqing Tong Jun Ge Co., Ltd. has 10,575 drugstores, the most among all retail chains, and Yunnan Hongxiang Yixintang Pharmaceutical Co., Ltd. boasts the largest number of direct-sale stores, numbering 5,758, all of which are directly operated by the company.

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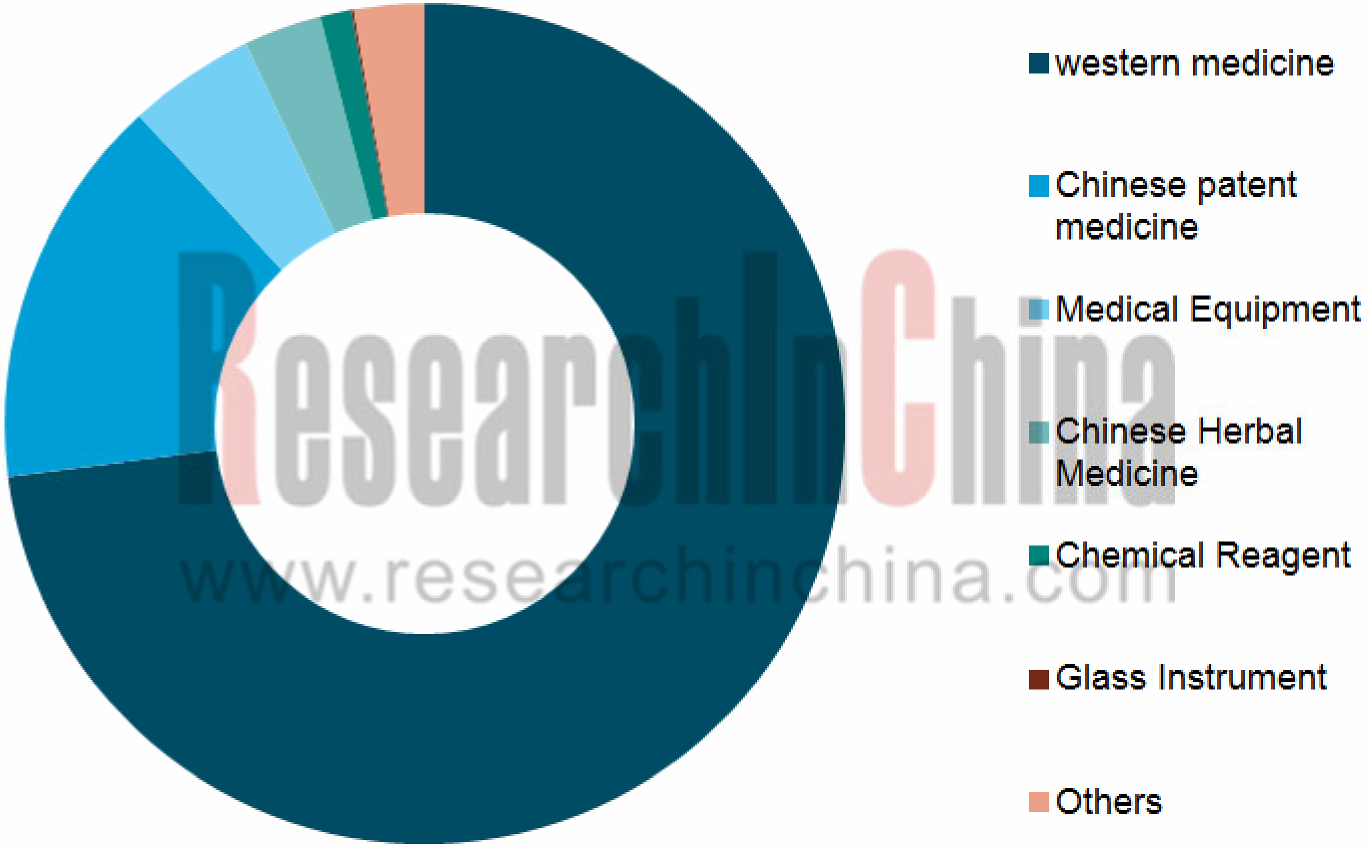
Pharmaceutical Distribution Sales Structure in China by Type, 2018



The immense potential of pharmaceutical distribution industry has attracted the inrush of capital in recent years, and mergers and acquisitions occurred frequently. Boosted by capital, drug circulation companies are gearing from traditional endogenous growth by adding more products, new stores and developing customers to extensive development by M&A and restructuring. The industry is becoming increasingly concentrated.

China Pharmaceutical Distribution Industry Report, 2019-2025 highlights the following:
●China pharmaceutical distribution industry (development environment, status quo, market size, market structure, competitive pattern and development trends);

●China drug retailing market (market size, gross margin and net margin, quantity, share of medical insurance designated stores, per customer transaction, and comparison of operating results between major drug retailers);

●20 Chinese pharmaceutical distribution companies (operation, revenue structure, gross margin, development strategy, etc.).

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