The Chinese Pharmaceutical Market to 2024

Commercial & Strategic Developments in the Chinese Pharmaceutical Market to 2024

GMRData.com

Contents

1. Executive Summary

2. Drivers & Restraints of Chinese Pharmaceutical Market

3. China Pharmaceutical Market Forecast

4. The Chinese Medical Device Market

5. The Chinese API Market

6. Key Chinese Therapeutic Markets

7. Major Players

8. Expert Opinion

List of Tables

List of Figures

Organisations mentioned in this Report

Abbott Laboratories and Takeda Pharmaceutical Co Ltd

Alcon

Alliance Boots GmbH

Amgen

Ascendancy Healthcare

Ascletis

AstraZeneca

Bayer Healthcare

BeiGene Ltd

Beijing Drug Administration

Beijing Montagne Medical Device Co., Ltd

Beijing Percil Instrument

Beijing University

BioMatrix

Biosensors Europe S.A.

Biosensors International Group, Ltd.

BMS

Boehringer Ingelheim

Celsion

Changzhou Kony Pharmaceutical Co., Ltd

Changzhou Pharmaceutical Incorporated

Charles River

China Resources Double Crane Pharmaceutical Co., Ltd

China Resources Sanjiu Pharmaceutical

China Shijiazhuang Pharmaceutical Group Co., Ltd (CSPC)

Ciba - Geigy Pharmaceutical Co., Ltd

Colgate-Palmolive Co

Concord Medical Services Holdings Limited

Covance

CSPC Huasheng Pharma

CSPC XNW Pharmaceutical Joint Stock Co., Ltd

CSPC Zhongrun Pharmaceutical Co. Ltd

Daiichi Sankyo

Dainippon Sumitomo Pharma

Eddingpharm

Eisai China Inc

Eisai Co., Ltd

FibroGen

Fudan University

GE Healthcare

GlaxoSmithKline

Grandhope Biotech

Guangzhou Pharma

Hangzhou East China Pharmaceutical Group

Hangzhou Optcla Medical Instrument

Hangzhou Tigermed Consulting

Harbin Pharmaceutical

Harbin Pharmaceutical Group Holding Co., Ltd

Hawley & Hazel (BVI) Co. Ltd.

Hisor

Hua Medicine Ltd

ICON

Innovation Centre China (ICC)

Ironwood Pharmaceuticals

Japan's Pharmaceuticals and Medical Devices Agency (PMDA)

Jiangsu Hengrui Medicine Co., Ltd

Johnson & Johnson

JOINN Laboratories

Jointown

Journal of Toxicology and Environmental Health

JW MedicalSystems Ltd

Kanghui Holdings

KangHui Medical

Kyowa Hakko Kirin Co.

LifeTech

Livzon Pharmaceutical Group Inc.

Medtronic

Merck & Co.

Merck Sharp & Dohme (China) Co. Ltd

MicroPort Scientific Corporation

Mindray

Nanjing MeiRui Pharma Co.

Nanjing Pharmaceutical Co.

Neptune Interlong Bio-Technique Co. Ltd. (NIBT)

NeuroVive Pharmaceutical AB

North China Pharmaceutical Group Corp (NCPC)

NovaMed

Novartis

Orchid Chemicals and Pharmaceuticals Limited

Peking University

Pfizer

Philips Electronics NV.

Philips Healthcare

Procter & Gamble Co.

ProteoTech

ProteoTech

Qianjin Pharmacy

Qidong Gaitianli Pharmaceutical

Quintiles

Roche

Sanofi- Aventis

SFDA

Shandong University

Shandong Weigao

Shandong Xinhua Pharmaceutical Company Limited

Shanghai Apex Electronics

Shanghai ChemPartner

Shanghai Institutes for Biological Sciences of Chinese Academy of Science

Shanghai Jiaotong University

Shanghai Jinhe Bio-Technology Co., Ltd

Shanghai Medical Optical Instrument

Shanghai New Hongqiao International Medical Center

Shanghai Pharmaceuticals

Shanghai Roche Pharmaceutical Co., Ltd.

Shanghai Zhongxi Sunve Pharmaceutical Co., Ltd.

ShangPharma

Shenzhen GSK-Neptunus Biologicals Co. Ltd

Shenzhen Neptunus Interlong Bio-Technique Co. Ltd

Shijiazhuang Lerentang Pharmaceutical Co.

Siemens

Siemens Healthcare Diagnostics

Siemens Hearing Instrument (Suzhou)

Siemens Medical Solutions Diagnostics Ltd

Siemens Mindit Magnetic Resonance (SMMR)

Siemens Shanghai Medical Equipment (SSME)

Siemens X-Ray Vacuum Technology (Wuxi)

Sihuan Pharmaceutical Holdings

Simcere Pharmaceutical Group (SCR)

Sino Biological and Pharmaron

Sinopharm

Spectrum Dynamics Medical, Inc.

Stryker

Synthes

Takeda (China) International Trading Co., Ltd

Tasly Group

Tianjin Tasly Pharmaceutical

Topsun Science and Technology

Trauson Holdings

Tsinghua University

Unilever Group

FDA

Vital River

Weihai Medical Polymer Co., Ltd

Wuhan Dragonbio

WuXi Apptec

Wyeth

X-Body Biosciences

1.2 Chapter Breakdown

Chapter 1 is an executive summary.

Chapter 2 introduces the primary drivers & restraints affecting the Chinese pharmaceutical market; highlighting which factors will drive the pharmaceutical market in China.

Chapter 3 introduces the Chinese Pharmaceutical drugs market; describing how the generic, patented, prescription and OTC drugs market in China has developed across 2008-2013 and how the market will shape up across the forecast period of 2014-2024

Chapter 4 analyses the Chinese medical devices market in 2012-13 and forecasts market growth for 2014-2024. The chapter looks at domestic challenges and opportunities in the Chinese medical devices market.

Chapter 5 analyses the Chinese API drug market in 2012-13 and forecasts market growth for 2014-2024. With many strong domestic suppliers of API, how will the market fare over the next 10 years?

Chapter 6 analyses the major therapeutic areas; Cardiovascular Diseases, Infectious Diseases, Oncology, Nervous System and Alimentary Tract & Metabolism across 2012-13 and forecasts market growth for 2014-2024.

Chapter 7 discusses the leading companies operating in the Chinese pharmaceutical market, looking at those with currently marketed therapies, as well as those with promising R&D activities.

Chapter 8 Offers expert opinion from key pharmaceutical industry experts.

1.3 Research and Analysis Methods

This report harnesses primary and secondary research. This study provides world market forecasts and analyses of market drivers and restraints (including SWOT and forecast analyses) and principal developments. We also provide geographical breakdowns of the world market. Our analyses are original, benefiting from our consulting experts in industry, academia, medical practice and other roles. Our analysts also refer to industry data, company reports, news and trade articles, public health data, policy documents and other analysts' views. We conduct primary research by telephone interviews, correspondence or face-to-face discussions.

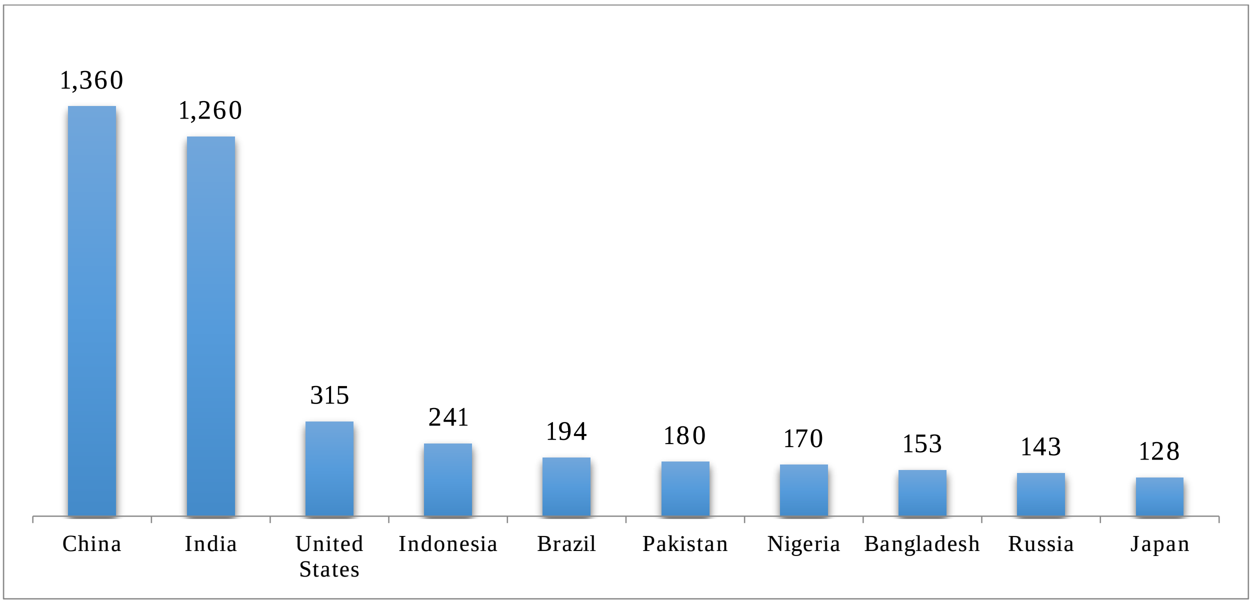
Our report contains quantitative and qualitative analytical content, covering the present and the future of healthcare markets. Although our report is a market-centered, we include medical and technical information. We include analyses of under-met market needs from the present looking forward. Our revenue forecasting assesses the magnitude and effects of driving and restraining forces, to determine annual growth and total sales across a series of years. We base our forecasts upon knowledge of financial performance, disease prevalence, product/technology characteristics and other factors, as well as data and opinions gathered from our primary and secondary research.

Products and vendors listed in this report are provided for reference and constitute neither a complete list, necessarily, nor an endorsement of any specific vendor or product. Also, in this report, only human cell products are considered.

Revenue figures in this report are for the respective world market, or market segment, unless stated otherwise. Tabulated revenue values for later years (2014 onwards) are whole-year predictions (January to December). Because of rounding, values may not add up exactly. Compound annual growth rate (CAGR) values are for 2014-2024. In this report, all revenue figures and market values are expressed in USD.

****

Figure 2.1.2 Projected comparison of China's population vs. other heavily populated countries 2016 (million people)



UN Statistics 2013

China, along with India, are the most populous nations globally; the UN estimate that by 2025 India will surpass China in terms of total population as China has adopted policies, such as the 'one child' policy, to curtail their increasing population. This 'one child' policy aimed at restraining population growth has resulted in the decrease of the younger population.

Due to the increasing elderly population and unmet medical needs, the Chinese government moved to implement healthcare reforms in 2009 with an investment of $124bn over three years. Accessibility and affordability were highlighted as the two planks of reform, to be carried out in two phases. At the end of 2013 the Chinese government boasted of offering 95% of the population, up from 45% in 2006, a network of basic healthcare facilities and an expanded public medical insurance system.

GMR Data estimate that healthcare spending in China will increase to $XXX by 2020 from $357bn in 2011. This figure covers pharmaceuticals, medical products and consumer health. Health expenditure per capita in China has risen from $191 in 2009 to $xxx in 2011, which is significantly higher than India ($44 in 2009 to $xxx in 2011). While the US has the highest health spending per capita ($7,990 in 2009 & $xxx in 2011), the percentage growth rate (2009 vs. 2011) is higher in China compared to India and the US. The per capita spending on healthcare in Brazil, Russia and Indonesia is higher than China.

Table 2.1.2 Health spending in China, India and the US, 2009 & 2011 ($/p/a & percentage change)

Country	2009	2011	% change
China	$191	xxx	xxx
India	$44	xxx	xxx
US	$7,990	xxx	xxx

GMR Data 2014

In March 2013 the Chinese government announced its plan to increase its medical spending by 27% and increase their medicine reimbursement list from 205 to 520. Additional plans included increasing the medical insurance system to cover an additional 20 diseases such as cancer, leukemia and type-1 diabetes.

Table 2.1.3 Total Health Expenditure (as % of GDP); Selected Countries 2004 to 2011

	2004	2005	2006	2007	2008	2009	2010	2011
Brazil	7.13	xxx	xxx	xxx	xxx	xxx	xxx	xxx
China	**4.75**	**xxx**	**xxx**	**xxx**	**xxx**	**xxx**	**xxx**	**xxx**
India	4.50	xxx	xxx	xxx	xxx	xxx	xxx	xxx
Russia	5.19	xxx	xxx	xxx	xxx	xxx	xxx	xxx
United States	15.78	xxx	xxx	xxx	xxx	xxx	xxx	xxx

World Bank 2013

Compared to other developing countries, such as India, China has taken greater efforts in raising life expectancy, expanding general education and securing the health care of the total population. India allocates 1.27% of its gross domestic product to government spending on health care, China allots 2.7%.