

Analysis Report of China Liver Disease Drug Industry 2015

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Abstracts

Liver damage can cause a series of diseases. According to the different etiology, liver disease can generally be divided into viral liver disease and non-viral liver disease. Non-viral hepatitis mainly includes alcoholic hepatitis, drug-induced hepatitis or toxin-induced hepatitis, metabolism abnormal hepatitis, hepatic calculus, etc. In 2013, there are total 1,251,900 cases of virus hepatitis reported in China, killing 739 people. Among them, the number of hepatitis A, hepatitis B, hepatitis C and hepatitis E reported were 22,200 cases, 963,000 cases, 203,200 cases, 27,900 cases and 35,600 cases respectively.

Liver disease drug market competition of our country is really fierce. China's liver disease drug market can be divided into imported drugs and home-made drugs according to the drug producing area. Imported drugs are mainly represented by GlaxoSmithKline and Bristol-Myers Squibb, etc.; the main production enterprises of home-made drugs include Chia Tai Tianqing Pharmaceutical Group, TIPR Pharmaceutical Responsible Company, Fujian Cosunter Pharmaceutical Company, etc. Hepatobiliary system drug has gradually become a variety that costs a large amount of money and it is the third largest one that ranks only second to anti-peptic ulcer and diabetes drug in the digestion metabolism category. In terms of the structure of drug, anti-viral drugs and free regulating drugs account for 30% of liver disease drug, auxiliary drugs account for 25% and Chinese medicine account for 36%.

The sales volume of China liver disease drug in hospital market is increasing. Before 2009, as a result of the continuous introduction of new products, new specifications and new dosage form products, the growth of sales was comparatively large, while its growth began to slow down from 2010. On the one hand, it is due to the hepatitis B vaccination rate has been increased significantly in recent years and the decrease of the expansion speed of hepatitis B patients; on the other hand, the growth of sales has

entered a smooth stage. The data issued by China Competition Information shows that, the scale of China liver disease drug market is close to RMB 43 billion in 2013.

China has become the world's top country who pays the most social cost for hepatitis B, liver cirrhosis and hepatoma. The data also shows that there are nearly 100 million Chinese among the 350 million hepatitis B carriers, and China accounts for nearly half of the 700,000 or so viral hepatitis related deaths each year. We have a large number of hepatitis B patients, while the growth of hepatitis C patients and alcoholic liver patients has grown rapidly in recent years. The liver disease diagnosis and treatment in our country has a large mass base. Individualized diagnosis and treatment of liver disease came from abroad. It is developed rapidly in our country in recent years, which puts forward higher requirements for the diagnosis of liver disease and the price ratio of drug curative effect. As the application of new diagnostic techniques and new drugs, the market scale of liver disease diagnosis and treatment industrial chain is still expected to grow steadily.

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