

The 2023-2028 Outlook for Biosimilars and Follow-on Biologics Drugs in China

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Abstracts

This study covers the latent demand outlook for biosimilars and follow-on biologics drugs across the regions of China, including provinces, autonomous regions (Guangxi, Nei Mongol, Ningxia, Xinjiang, Xizang - Tibet), municipalities (Beijing, Chongqing, Shanghai, and Tianjin), special administrative regions (Hong Kong and Macau), and Taiwan (all hereafter referred to as 'regions'). Latent demand (in millions of U.S. dollars), or potential industry earnings (P.I.E.) estimates are given across some 1,100 cities in China. For each major city in question, the percent share the city is of the region and of China is reported. Each major city is defined as an area of 'economic population', as opposed to the demographic population within a legal geographic boundary. For many cities, the economic population is much larger than the population within the city limits; this is especially true for the cities of the Western regions. For the coastal regions, cities which are close to other major cities or which represent, by themselves, a high percent of the regional population, actual city-level population is closer to the economic population (e.g. in Beijing). Based on this 'economic' definition of population, comparative benchmarks allow the reader to quickly gauge a city's marketing and distribution value vis-?-vis others. This exercise is quite useful for persons setting up distribution centers or sales force strategies. Using econometric models which project fundamental economic dynamics within each region and city of influence, latent demand estimates are created for biosimilars and follow-on biologics drugs. This report does not discuss the specific players in the market serving the latent demand, nor specific details at the product level. The study also does not consider short-term cyclicalities that might affect realized sales. The study, therefore, is strategic in nature, taking an aggregate and long-run view, irrespective of the players or products involved.

In this report we define the sales of biosimilars and follow-on biologics drugs as

including all commonly understood products and/or services falling within this broad category, irrespective of product packaging, formulation, size, or form. Companies participating in this industry include Allergan, Allozyne, Alteogen, Alvogen, Amarey Novamedical, AMEGA Biotech, Amgen, Apotex, Astellas Pharma, AstraZeneca, Avesthagen, Baxter, Bayer, Beijing Four Rings, BIOCAD, Bioceuticals, Biocon, Biogen, Biolab, Bionovis, Biopartners, Biosidus, Bioton, BioXpress Therapeutics, Boehringer Ingelheim, Bristol-Myers Squibb, Cambridge Antibody Technology, CCL Pharmaceuticals, CCM Duopharma, Celltrion, Centocor Ortho Biotech, Chong Kun Dang, Chugai, CinnaGen., Coherus BioSciences, Compass Biotechnologies, Cristofina, CT Arzneimittel, Cyplasin, Daiichi Sankyo, Dong-A Pharmaceutical, Dr. Reddy's Laboratories, Egis Pharmaceuticals, Eisai, Eli Lilly, Elpen Pharmaceutical, Emcure Pharmaceuticals, EMS, Epirus, Eurofarma, Express Scripts, FibroGen, Finox Biotech, Fuji Pharma, Gan & Lee, Genetech, Genexine, Genova, GenSci, Genzyme, Geropharm, Gilead Sciences, GlaxoSmithKline, Hangzhou Jiuyuan Gene Engineering Company, Hanmi Pharmaceutical, Hanwha Chemical, Haselmeier, Health Canada, Helius Biotech, Hexal, Hindustan Antibiotic, Hospira, Hualida Biotech, Hypermarcas, IGES Institute, Intas Biopharmaceuticals, inVentiv Health, JCR Pharmaceuticals, Johnson & Johnson, Kabi, Kemwell Biopharma, Kissea, Koza Farma, Kwizda Pharma, Kyowa Hakko Kirin, Landsteiner Scientific, LG Life Sciences, Libbs, LKM SA, Lonza Group, Mabion, Marvel Life Sciences, MEDICE Arzneimittel Pflanzlich, Merck (MSD), Minapharm, Mitsubishi Tanabe, Mochida Pharmaceutical, Momenta Pharmaceuticals, Mycenax Biotech, Mylan, Nichi-Iko, Nippon Kayaku, Novartis, Novo Nordisk, Nuron Biotech, Oncobiologics, Ortho Pharmaceutical, Orygen, PanGen Biotech, Pfenex, Pfizer, Pharmapark, Pharmstandard, PRA International, Pro Generika, Qilu Pharmaceutical, Quintiles, Ranbaxy Laboratories, RAND Corporation, Ratiopharm, Regeneron Pharmaceuticals, Reliance GeneMedix, Rentschler Biotechnologie, Roche, Samsung Bioepis, Sandoz, Sanofi, SciGen, Shandong Kexing Pharma, Shanghai Celgen Biopharmaceutical, Shantha Biotechnics, Shinogi, Sicom Biotech, Sothema Laboratories, Spectrum Pharmaceuticals, Stada Arzneimittel, Stragen Pharma, Strides Arcolab, Syngene International, Synthon Biopharmaceuticals, Takeda, Teva, Tianjin Hualida Biotechnology, Tonghua Dongbao, TSH Biopharm, Unimicron, USV Biologics, Virchow Biotech, Wanbang Biopharmaceuticals, Wockhardt, Xiamen Amoytop Biotech, Zenotech, Zhejiang Huahai Pharmaceutical, Zuventus, and Zydus Biovation. In addition to the sources indicated, additional information available to the public via news and/or press releases published by players in the industry was considered in defining and calibrating this category. All figures are in a common currency (U.S. dollars, millions) and are not adjusted for inflation (i.e., they are current values). Exchange rates used to convert to U.S. dollars are averages for the year in question. Future exchange rates are assumed to be constant in the future at the current

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