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China Large Volume Parenteral (LVP) Industry Report, 2013-2015

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Abstracts

Under the context of China's medical reform and sustainable development of the pharmaceutical market, the output and demand of Large Volume Parenteral (LVP) which is one of the top five Chinese preparations have grown year by year. In 2006-2012, China’s injection output presented the CAGR of 19.2%. However, due to the low barriers to entry, China has seen some signs of the surplus injection capacity, which exceeds the demand by roughly 40%.

Overcapacity and fierce competition are caused by the irrational injection product structure and homogeneity. For example, the output and sales volume of fluid balance injection products with low added value account for 89% of the injection market, but the sales revenue only shares 47%. At the same time, the market demand for amino acids, fat emulsion dual-chamber bags, fat emulsion, total parenteral nutrition, hydroxyethyl starch and unique traditional Chinese medicine injection is quite strong.

Compared to Europe and other developed countries, the concentration degree of Chinese LVP market is still lower. At present, 200 ones of 400 qualified Chinese LVP enterprises run business soundly. By output, the top 10 Chinese companies contribute about 65%; in terms of sales revenue, they devote about 40 %.

Like other chemical preparation segments, Chinese high-end LVP market is still dominated by foreign pharmaceutical companies such as Japan Otsuka, Germany Fresenius Kabi, and USA Baxter.

Take fat emulsion products for example. Fat emulsion is imported by China frequently as a blood and hematopoietic system drug in recent years, with its import volume having been at the high level of typical urban hospitals in 22 Chinese cities for

consecutive years. Particularly, the procurement value of moderate and long-chain fat emulsion imported by Chinese typical hospitals hit RMB354million. In China, fat emulsion injection suppliers include Kelun Pharma, Sino-Swed Pharmaceutical Corp, Ltd. (under Fresenius Kabi) and Guangzhou Baxter Qiaoguang (under Baxter) with the respective output of 14.19 million bottles/bags, 8.1 million bottles / bags (including medium/long-chain fat emulsion) and 5.69 million bottles/bags (medium/long-chain fat emulsion) in 2012.

The report highlights the followings:

Status quo, competition patterns, product structure, regional distribution and development forecast of Chinese LVP market;

Status quo and competition patterns of fluid balance injection, therapeutic injection, nutrition injection, injection for blood volume expansion and peritoneal dialysis fluid injection and other market segments;

Operation, LVP business and prospects of 10 companies including Kelun Pharma, China Resources Double-Crane, Fengyuan Pharmaceutical, Huaren Pharmaceutical, Southwest Pharmaceutical and Lijun International Pharmaceutical.

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