

China Pharmaceutical Distribution Industry Report, 2013

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Abstracts

Thanks to the continuous advancement in new medical reform, China's pharmaceutical distribution industry has maintained a fairly rapid growth in recent years, with the sales value showed a CAGR of roughly 20% in 2005-2013. As the leading players in China's pharmaceutical distribution industry, Shanghai Pharma, Jointown and China National Accord Medicines achieved the revenue of RMB58.1 billion , RMB24.8 billion , RMB15.8 billion, respectively, in the first three quarters of 2013.

In terms of drug categories, western medicine constitutes the first major category in Chinese medicine distribution market, accounting for approximately 70% of total revenue from Chinese pharmaceutical products during 2012-2013. Then what comes the next are Chinese patent medicine and traditional Chinese medicinal materials, which occupied 16.8% and 4.5%, respectively, of total revenue. In terms of distribution channels, the proportion of China's drug retail terminal and hospital terminal market share stood at 1:4.

The concentration of Chinese pharmaceutical distribution industry is relatively low. Take pharmaceutical chain market for example. In recent years, China's top 100 pharmaceutical chain enterprises have seen a rise in market share, but still less than 40%. In 2013, China's top 100 pharmaceutical chain enterprises posted a total of RMB98.36 billion in sales, up 11.9% from a year earlier. Guoda Drugstore under China National Accord Medicines still firmly held the first place in China's top 100 pharmaceutical chain enterprises, with the sales value for 2013 hitting RMB5.7 billion, a roughly 20% increase.

At present, Chinese pharmaceutical B2C sales model occupies a small market share in pharmaceutical terminal market, but grows rapidly. As of March 2014, a total of 235

companies in China have gained Qualification Certificate for Online Drug Trading Services, including 162 online pharmacies. In 2013, Chinese pharmaceutical B2C market presented the explosive growth, with transaction scale hitting RMB4.26 billion, up 166% from a year earlier. But due to policy restriction, consumers now fail to buy prescription drugs through pharmaceutical B2C, and medical insurance is not available, which would, to a certain extent, restrict the development of Chinese pharmaceutical B2C market.

China Pharmaceutical Distribution Industry Report, 2013-2017 involves the following:

Business model, operating environment, market size, sales structure, etc of Chinese drug distribution industry;

Stores, customers, sales structure and online pharmacies, etc of Top 100 Chinese drugstore chains;

Operation, profits, etc of 13 listed companies in Chinese pharmaceutical distribution industry.

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