

China Chemical Pharmaceutical Industry Report, 2011

<https://marketpublishers.com/r/C86105FAD86EN.html>

Date: January 2012

Pages: 112

Price: US\$ 2,300.00 (Single User License)

ID: C86105FAD86EN

Abstracts

In Jan.-Aug., 2011, the gross industrial output value of Chinese chemical pharmaceutical industry surged by 24.54% YoY to RMB460.531 billion, up 2.67 percentage points over the same period of last year, presenting remarkable upward momentum. The chemical pharmaceutical industry of China chiefly comprises two sub-sectors chemical API and drug preparation which show differentiated development.

China is currently the world's largest producer and exporter of chemical API and can produce more than 1,500 varieties with the capacity approximating 2 or 3 million tons. However, key bulk API products including vitamins and antibiotics witness overcapacity, which has resulted in low-price competition bringing adverse impact on the export of API. In Q1 2011, the API export of China increased by 39.53% year-on-year, with the export value rising 31.31% from the same period of last year, while the average export price fell 5.89% year-on-year. In particular, the average export price of Vitamin C slumped by 30%.

In comparison with chemical API sector, the chemical drug preparation sector of China enjoys higher profitability as a whole, with the gross margin in 2010 hitting 39.6% and two-fold of that of API industry. Yet, chemical preparation industry of China is still in its infancy with short R&D capability of new drugs, and therefore the production of generics is the mainstream.

The report focuses on the market size and development trend of China chemical pharmaceutical industry as well as the market scale of API and chemical preparation on the basis of the outlook for new drug R&D and market development worldwide. In addition, the market planning and new drug R&D of the leading 20 listed industrial players is also analyzed here.

Northeast Pharmaceutical Group Co., Ltd. is one of the largest Vitamin C producers in

China. In 2011, the Vitamin C capacity of the company reached 25,000 tons. Currently, its investment is mainly earmarked for API. Also in 2011, it raised funds RMB2.645 billion to build Xihe-based API production base covering Vitamin C API, fosfomycin series products, L-carnitine series, and so forth.

As one of key chemical pharmaceutical companies in China, the operating revenue of Huadong Medicine Co., Ltd in Jan.-Sep., 2011 increased by 25.51% year-on-year to RMB8.195 billion. Its holding subsidiary, Hangzhou Zhongmei Huadong Pharmaceutical, is regarded as the largest immunosuppressant producer in China.

Jiangsu Hengrui Medicine Co., Ltd is the one with the most new drugs independently developed among pharmaceutical companies in China. In 2011, it filed for the production of four new drugs with Class - and for the clinical trial of four new chemical medicines with class - and one biological medicine with class. Moreover, eleven new chemical medicines with class - and one biological medicine with class were under clinical trial. In December 2011, Irinotecan injection developed by Jiangsu Hengrui Medicine Co. won the FDA certification and became qualified to be sold in the US market, which made it be the first of this kind among Chinese peers.

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