

# China Pharmaceutical Chain Industry Report, 2011



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In China, the pharmaceutical circulation enterprises see relatively low profit margin due to many circulation links. By sales value, some 20% drugs are sold to consumers through pharmaceutical retail firms, and the rest 80% are sold out through hospitals (with general hospitals, community and township hospitals included).

In 2010, the sales of drug stores in China increased by 10.16% year-on-year to RMB140.8 billion, accounting for 20.98%; while that of hospitals rose 16.96% year-on-year to RMB531 billion, making up 79.02%. In recent three years, the average sales value for drug stores has maintained moderate growth by 12.16%.

The report introduces pharmaceutical circulation industry and pharmaceutical chain industry of China. Besides, it highlights the development, outlet distribution, sales structure and operation of the top 100 China-based pharmaceutical chain enterprises. At length, the report summarizes the industry and development tendency through conducting a detailed analysis on key players.

Since 2008, the number of Chinese pharmaceutical chain enterprises has been declining year after year, but the outlet scale for individual enterprise has presented a rising trend. In 2007-2010, the number of drug stores in China showed an average growth rate of roughly 7%, indicating that the concentration rate is improving although the rate in the overall industry is at a low level. ?

China Nepstar Chain Drugstore Ltd. is a drug store chain enterprise with the largest number of retail outlets in Chinese Mainland, with the drugstore stretching 74 cities in 14 provinces across China. As of September 30, 2011, the company boasted 2,927 regular chain outlets. In Q1-Q3, 2011, the operating revenue of China Nepstar Chain Drugstore Ltd. surged by 6% year-on-year to RMB1.833 billion, with the net income of RMB18.27 million. By contrast, the loss in 2010Q1-Q3 hit RMB401, 000.? ?

For Chongqing Tongjunge Pharmacy, it employs franchise business model for further development. As of September 30, 2011, the company had 1,272 regular chain stores and 6,438 franchised outlets. In 2011, the sales of the company registered RMB3.36 billion, up 33% from a year earlier.

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