

Global and China Insulin Industry Report, 2013-2017

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Abstracts

As the third largest human health disease following neoplastic disease, cardiovascular and cerebrovascular diseases, the number of diabetic patients has continued growing from 246 million in 2007 to 382 million in 2013 at a compound annual growth rate of 7.6%. And insulin as the important diabetes medication has also seen increasing market size. In 2012 the global insulin market size reached US\$20.8 billion, a year-on-year rise of 12.9%, basically monopolized by Novo Nordisk, Sanofi and Eli Lilly, which altogether accounted for 88.7% of market share.

Being the biggest diabetes power in the world, China currently has 98.4 million patients, accounting for about 25.8% of the world's total. With the maturing of national health insurance system and improvement of economic level, the Chinese insulin drug market size has been on the rise, with the CAGR in 2007-2012 up to 25.4%, well above that of the global insulin market size, and it is expected to maintain a CAGR of at least 15% in the next few years.

Insulin has seen an increasing proportion of Chinese diabetes drug market, from 38.7% in 2007 to 55.6% in 2012. However, due to technical barriers, China's insulin market is mainly occupied by Novo Nordisk, Sanofi and Eli Lilly, of which, Novo Nordisk accounted for 60.3% in 2012. While in recombinant human insulin market segments, the local Chinese enterprise –Tonghua Dongbao Pharmaceutical Co., Ltd. occupied part of the market with approximately 16% share.

Attracted by China's tremendous diabetes drug market, multinational companies like Bayer, United Laboratories as well as the local Wanbang Biopharmaceuticals and Hisun Pharmaceutical are speeding up layout in China's insulin market. Among them, Bayer Schering Pharma has obtained exclusive marketing and distribution rights of Poland's Bioton insulin product "SciLin" in China as early as 2009; the recombinant Lispro Insulin of Wanbang Biopharmaceuticals has also received clinical approval issued by

SFDA in September 2013.

Global and China Insulin Industry Report, 2013-2017 mainly covers the followings:

Development status, supply and demand, competition pattern, R&D for new products, development tendency , etc of global insulin market;

Relevant policies, supply and demand, import and export, competition pattern, market price, development tendency , etc of Chinese insulin market;

Operating conditions, insulin business and development forecast, etc of three international insulin giants - Novo Nordisk, Sanofi, Eli Lilly as well as four local companies e.g. Dongbao, Wanbang Biopharmaceuticals.

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