

Global and China Biopharmaceutical Industry Report, 2010

<https://marketpublishers.com/r/GFDBB340985EN.html>

Date: September 2010

Pages: 121

Price: US\$ 2,000.00 (Single User License)

ID: GFDBB340985EN

Abstracts

In recent years, biopharmaceutical industry has been the fastest growing sector in the global pharmaceutical industry. From 1998 to 2009, the compound annual growth rate of biopharmaceutical industry reached 18.6%, far higher than 8.5% of the global pharmaceutical market. USA is the most active country in R & D and innovation of biopharmaceutical products, taking the core position in the global biotechnology industry. Now, nearly 60% of biotechnology patents are held by USA.

At present, there are more than 700 companies in China's biological and bio-chemical pharmaceutical industry, with total sales revenue of about RMB75.3 billion in 2009. Growing at a compound annual growth rate of about 30% from 2005 to 2009, China biological and bio-chemical pharmaceutical industry had become one of the fastest growing fields in China pharmaceutical industry. China is still backward in biomedical development compared with European and American countries. Currently, China biological and bio-chemical pharmaceutical industry only takes a small proportion in China pharmaceutical industry, and only contributed 10% to the total sales revenue in 2009, so it has broad room for growth.

As for segments, the international blood products market is monopolized by big companies, Bayer and Baxter acquire as high as 80% market shares. Due to the lack of plasma, China is confronted with tight supply of blood products, with low concentration degree and many manufacturers. In the international blood products market, coagulation factor products take the dominating position; however, in the Chinese blood products market, human albumin and immune globulin products take the dominating position, while coagulation factor products account for a small proportion and have huge potentials in the future. Hualan and Shanghai RAAS have diversified blood products with strong competitiveness.

The international vaccine market has high concentration degree. GlaxoSmithKline, Sanofi-Aventis, Merck, Pfizer/Wyeth and Novartis are the leaders in the market. Chinese vaccine market has low concentration degree, with many manufacturers. Vaccine I (planned vaccine) still has potentials because of the big difference between China and high-income countries in child mortality; Vaccine II has huge potentials in the future with the rise of per capita income and the enhancement of citizens' awareness of disease prevention. Tiantan Biological has many types of vaccine, and it has acquired Chengdu Ronsen which has one of the largest blood product workshops, so it will achieve growth in the future.

In the international diagnostic reagent market, mergers and acquisitions frequently occur. The pharmaceutical giants are aggressively acquiring small and medium diagnostic reagent companies. Increased product lines and expanded application fields make diagnostic reagent grow rapidly. In Chinese diagnostic reagent market, the major companies include KHB, Da An Gene and so on. The low-end biochemical diagnostic reagents occupy the leading position in Chinese market, but China is developing mainstream immune diagnostic reagents and nucleic acid diagnostic reagents which are popular in the international market.

Monoclonal antibody drugs have been the antibody drugs with the highest compound annual growth rate in recent years. Among Top 20 Best-Selling Drugs in the World in 2009, there were four monoclonal antibody drugs. During 1999 to 2009, the compound growth rate of the global monoclonal antibody drug market reached 62.88%. Chinese monoclonal antibody drug market is still in the initial stage, and the market only values RMB1 billion, showing a big gap with the developed countries in Europe and the United States. Now, China has had antibody drug industrial bases in Beijing, Shanghai and Xi'an. The base in Beijing is led by Beijing Biotech Pharmaceutical Co., Ltd. (BPL) and Beijing Mabworks Biotech Co., Ltd. The base in Shanghai is led by Shanghai CP Guojian Pharmaceutical Co., Ltd. (CPGJ). The base in Xi'an is led by the Fourth Military Medical University and Chengdu Huasun Group.

Recombinant protein drugs are widely used in the treatment of a variety of major diseases, with huge market potentials. GeneScience Pharmaceuticals Co., Ltd. (GenSci) which is a subsidiary of Changchun High and New Technology Industries (Group) Inc. is the first one to develop recombinant human growth hormone in China, with large market shares. Anke Biotechnology is the only manufacturer that is granted with the approval to produce interferon and growth hormone at the same time. Tonghua Dongbao is a leading enterprise in China insulin industry, and long-acting insulin will be

the highlight in its future growth. Therapeutic antibodies and genetic engineering vaccines will generate considerable revenue for SL Pharmaceutical.

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