

Investigation Report on China Epoetin Alfa Market, 2009-2018

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Abstracts

Epoetin alfa refers to erythropoietin (EPO), a hormone-like substance secreted by kidney and liver that stimulates erythropoiesis. Indications of EOP approved in China are renal anemia, anemia after chemotherapy and surgery perioperative red blood cell mobilization.

The ratio between EPO used in renal dialysis and in chemotherapy is 3:1. Growth rate of EPO used in chemotherapy is about 20% to 25%, which is higher than that of renal dialysis. However, in the international market, more EPO is used in anemia after chemotherapy than in renal dialysis. This indicates huge market space for EPO used in anemia after chemotherapy in China.

Originally developed by Amgen Inc., epoetin alfa was approved to the U.S. in June 1989 by FDA with the trade name "Epogen". It is sold in over 40 countries now. Amgen is the only authorized product sold in the U.S. hemodialysis market. However, in other indications' market in the U.S., due to financial shortage, Amgen gave the marketing right of Epogen to Kirin-Amgen, Inc. (joint venture of Amgen and Kirin). The company then authorized Ortho Pharmaceutical Corporation of Johnson & Johnson to sell the product with the brand name "Procrit". In other countries including Chinese mainland, Taiwan and Japan, the drug is sold by Kirin Inc. and Johnson & Johnson with the trade names "Espo" and "Eprex" respectively. Both the companies are authorized by Kirin-Amgen.

Domestic enterprises took more than half of Chinese EPO market, leading to a market dominated by domestic EPO. According to CRI's market investigation on Chinese sample hospital market, "Yi Bi Ao" produced by Shenyang Sunshine Pharmaceutical Co., Ltd. seizes more than half of the EPO market. Kirin Brewery takes more than 10%

market share while the other is occupied by other Chinese manufacturers.

As manufacturing technique improves and cost declines as well as Chinese people's affordability increases, EPO is no longer as expensive as it was 10 years ago. However, due to expansion of communities and rural markets in China, more market space is provided for EPO to develop. The sales revenue of EPO in 2013 was more than CNY 1 billion in Chinese hospital market. Incidence of chronic kidney diseases among Chinese adults is over 10% with more than 140 million patients. The number continues to grow. If 1% of the patients eventually get end-stage renal disease, there will be over 1 million dialysis patients in China. In theory, if a renal dialysis patient uses one ampoule of EPO every 3 days, annual consumption of EPO injections in Chinese hospitals will be 100 million at least. In practice, however, most people cannot afford it. Half of Chinese population is from the rural, and they use significantly smaller amount of EPO compared with urban residents. Therefore less than half of the predicted amount of EPO is actually used. Consequently, the market is very promising.

In China, application of EPO in chemotherapy is far below a reasonable level, for tumor patients spend most of their money on antitumor surgeries and drugs before choosing EPO as the adjuvant drug. The EPO market is thus inevitably less developed than the antitumor drug market.

Annual sales revenue of EPO in China is under USD 300 million while that of the global market is USD 10 billion. On the one hand, consumption of EPO per capita in developed countries such as the U.S.A. is very large. On the other hand, renal dialysis is far from common enough in China. Among over 1 million patients who need renal dialysis merely 0.3 to 0.4 million patients are able to afford it. This has seriously hindered the popularization of EPO in China. As Chinese economy develops and health care improves, more patients will be able to afford renal dialysis. Estimation also shows that the development of renal dialysis market in China will significantly promote the development of EPO market.

Through this report, the readers can acquire the following information:

Demand of Epoetin Alfa in China Market

Market Share of Epoetin Alfa Produced by Different Enterprises in China
Hospital Market

Sales Price of Epoetin Alfa in China Hospital Market

Major Epoetin Alfa Manufacturers in China

Market Overview of Epoetin Alfa in China

The following enterprises and people are recommended to purchase this report:

EPO APIs and Finished Product Manufacturers

Investors /Research Agencies Focusing on China EPO Drug Market

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