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Investigation Report on China's Aflibercept Market 2022-2031

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Abstracts

Aflibercept is an anti-VEGF drug, mainly used to treat neovascular age-related macular degeneration (wAMD), and other retinopathy caused by visual impairment. Aflibercept was jointly developed by Regeneron and Bayer. Regeneron has exclusive sales rights in the U.S. market, while Bayer obtains exclusive sales rights outside the U.S. Their Aflibercept, EYLEA was launched in China in 2018. By July 2022, Bayer AG is the only manufacturer in the Chinese Aflibercept market.

According to CRI's market research, after Aflibercept entered the Chinese market, the sales value of Aflibercept in China increased from CNY8.3 million in 2018 to CNY238 million in 2021. The annual growth rate in 2021 was 116%, which slowed down due to the COVID-19 epidemic. The CAGR of sales value of aflibercept in China is 206% from 2018 to 2021.

CRI analyzes that as the epidemic situation has been improved and the hospitals resume their operation, the sales of Aflibercept will have a recovery growth from 2023 to 2026. In addition, the sales will also increase due to market expansion. Currently, China has only approved two indications for Aflibercept, including treatment of wAMD and treatment of DME. However, Aflibercept had five approved indications globally, which means the sales will continue to grow as the number of indications expands. On the other hand, though the anti-VEGF ophthalmic drug market where Aflibercept belongs to accounts for the largest market share in the ophthalmology drug industry, the penetration rate for the anti-VEGF drug is still low. The penetration rate for the anti-VEGF drug is about 1% in China, while it exceeds 5% in the U.S. Since the market demand has not yet reached saturation, the sales will keep increasing. Besides, Aflibercept was included in the national medical insurance catalog at the beginning of 2020, so the price has been lowered, which reduces the burden on patients and will

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stimulate sales in the future.

Qilu Pharmaceutical, a local Chinese pharmaceutical company, received CDE (CENTER FOR DRUG EVALUATION, NMPA) approval for its marketing authorization application for aflibercept intravitreal injection in April 2022, which is the first biosimilar application for aflibercept in China.

According to CRI's market research, a number of other pharmaceutical companies in China are in the process of genericizing aflibercept, such as Clover Biopharmaceuticals' aflibercept intraocular injection, which is in the clinical phase of application, and Shandong Boan Biotechnology Co.

It is expected that the generic version of aflibercept will enter the Chinese market in the next five years, but it is unlikely to have a significant impact on Bayer's original drug in the short term.

Topics Covered:

The impact of COVID-19 on China's aflibercept market

Sales value and volume of China's aflibercept 2016-2020

Competitive landscape of China's aflibercept market

Prices of aflibercept in China

Prices of aflibercept in China by regions and manufacturers

Analysis on factors affecting the development of China's aflibercept market

Prospect of China's aflibercept market from 2021 to 2025

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