

Investigation Report on China's Insulin Detemir Market, 2018-2022

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Abstracts

Description

In the past three decades, the incidence of diabetes kept rising in China with the aging population, changed dietary habits and reduced physical activities resulting from the rapid economic development. It is estimated that at the end of 2017, there were more than 100 million diabetic patients in China. Most of them are Type 2 diabetic patients. The increasing number of diabetic patients expands the market size of diabetes drugs in China.

Insulin analogs include quick-acting insulin analogs, long-acting insulin analogs and premixed insulin analogs. Long-acting insulin analogs include Insulin Glargine and Insulin Detemir. The Guidelines for the Prevention and Treatment of Type 2 Diabetes in China (2017 Edition) updated the instructional roadmap for the clinical treatment of diabetes from the use of first-line, second-line, third-line and fourth-line drugs to the use of a single drug, fixed dose combinations which combines two or three drugs, and insulin injections, which drove the growth of the insulin market.

Developed by Danish company Novo Nordisk with genetically engineered recombinant human insulin, Insulin Detemir is a new-type long-acting soluble insulin analog that avoids the common side effects of non-soluble insulin. In 2005, Novo Nordisk's Insulin Detemir (trade name: Levemir) was launched in the U.S. In 2014, the global sales value of Levemir reached USD 2 billion. In 2017, it was USD 2.28 billion, about 17.7% lower than that in 2016. Levemir is a basal insulin with Insulin Detemir as the active pharmaceutical ingredient (API). The long-acting insulin analog has a mild and predictable effect, and is less likely to cause weight gain and nocturnal hypoglycemia. CRI's market research shows that since 2009 when the drug was introduced to China,

the sales value of Insulin Detemir has been rising. It increased from less than CNY 3 million in 2010 to more than CNY 100 million in 2017.

According to CRI, by the end of 2018, China's Insulin Detemir is monopolized by Novo Nordisk. However, some Chinese companies is developing generic Insulin Detemir. For example, Tonghua Dongbao Pharmaceutical Co., Ltd. filed the CFDA with the drug registration applications for Insulin Detemir API and Insulin Detemir injection on Apr. 15, 2015, and obtained the clinical trial approvals for its Insulin Detemir API and Insulin Detemir injection on Oct. 20, 2017. Other companies have also applied for registering their Insulin Detemir API and Insulin Detemir injections but have not obtained the approvals yet. These companies include Chia Tai Tianqing Pharmaceutical Group Co., Ltd. and Zhuhai United Laboratories Co., Ltd. From 2020, the generic Insulin Detemir by Chinese pharmaceutical companies will be launched in succession.

It is expected that as the number of diabetic patients continues to grow, Insulin Detemir will still have huge market potential from 2018 to 2022.

Topics Covered:

Situation of diabetes in China

Sales of Insulin Detemir in China

Prices of Insulin Detemir in China

Progress of generic Insulin Detemir by Chinese enterprises

Prospect of China's Insulin Detemir market from 2018 to 2022

Contents

1 RELEVANT CONCEPTS OF INSULIN DETEMIR

- 1.1 Indications for Insulin Detemir
- 1.2 Development of Insulin Detemir in China
- 1.3 Governmental Approval of Insulin Detemir in China

2 SALES OF INSULIN DETEMIR IN CHINA, 2013-2017

- 2.1 Sales Value of Insulin Detemir
 - 2.1.1 Overall Sales Value
 - 2.1.2 Sales Value by Region
- 2.2 Sales Volume of Insulin Detemir
 - 2.2.1 Overall Sales Volume
 - 2.2.2 Sales Volume by Region
- 2.3 Sales of Insulin Detemir by Dosage Form in China, 2013-2017

3 ANALYSIS ON MAJOR INSULIN DETEMIR MANUFACTURERS IN CHINA, 2013-2017

- 3.1 Analysis on Market Share of Major Insulin Detemir Manufacturers
 - 3.1.1 Market Share by Sales Value
 - 3.1.2 Market Share by Sales Volume
- 3.2 Novo Nordisk
 - 3.2.1 Enterprise Profile
 - 3.2.2 Sales of Novo Nordisk's Insulin Detemir in China⁸
- 3.3 Progress of Generic Insulin Detemir in China

4 PRICES OF INSULIN DETEMIR IN CHINA, 2017-2018

- 4.1 Novo Nordisk (Levemir)
- 4.2 Pricing Strategies for Generic Insulin Detemir

5 PROSPECT OF CHINA'S INSULIN DETEMIR MARKET, 2018-2022

- 5.1 Major factors influencing China's Insulin Detemir market
 - 5.1.1 Favorable Factors
 - 5.1.2 Unfavorable Factors

5.1 Forecast on Market Size

5.2 Forecast on Market Trend

LIST OF SELECTED CHARTS

Chart Sales Value of Insulin Detemir in China, 2013-2017

Chart Sales Value of Insulin Detemir in Parts of China, 2013-2017

Chart Sales Volume of Insulin Detemir in China, 2013-2017

Chart Sales Volume of Insulin Detemir in Parts of China, 2013-2017

Chart Sales Value of Insulin Detemir Injections in China, 2013-2017

Chart Sales Volume of Insulin Detemir Injections in China, 2013-2017

Chart Sales Value of Novo Nordisk's Insulin Detemir in China, 2013-2017

Chart Sales Volume of Novo Nordisk's Insulin Detemir in China, 2013-2017

Chart Generic Insulin Detemir Being Developed in China

Chart Prices of Novo Nordisk's Insulin Detemir (Levemir) in Parts of China, 2017-2018

Chart Governmental Approval of Insulin Detemir in China

Chart Forecast on Sales Value of Insulin Detemir in China, 2018-2022

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