

Investigation Report on China's Recombinant Human Follitropin Market, 2018-2022

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Abstracts

DESCRIPTION

According to CRI, as environmental pollution intensifies and Chinese people's lifestyle changes, the incidence of infertility is increasing in China. In 2017, the incidence of infertility among married couples in China was 10%, more than double the 4.8% in 1984. It is estimated that about 15% to 20% women of childbearing age in China are troubled by infertility. In China, as the biggest cause of female infertility, follicular dysplasia syndrome resulting from endocrine dysfunction accounts for over 40% of female infertility.

In China's end markets of ART and sex hormone drugs, macromolecular bioengineered drugs such as Recombinant Human Follitropin, Recombinant Follitropin beta, Recombinant Human Chorionic Gonadotropin, and Recombinant Human Lutropin alfa are taking the place of small-molecule chemicals.

Follicle-stimulating hormone (FSH) is a heterodimeric glycoprotein formed by the non-covalent binding of subunits alpha and beta. FSH, luteinizing hormone (LH), thyroid-stimulating hormone (TSH) and human chorionic gonadotropin (HCG) are collectively known as the glycoprotein hormones family. They share the same alpha subunit but differ from each other in beta subunit which determines their biological activity. FSH has important medicinal value in reproductive health. It can promote ovulation for natural production or artificial insemination, and can also help produce ova for in vitro fertilization (IVF) and intracytoplasmic sperm injection (ICSI).

According to CRI, the FSH products in China include Urofollitropin (u-FSH) extracted from urine and Recombinant Human Follitropin (rh-FSH). Due to high purity and

stability, Recombinant Human Follitropin (rh-FSH) has great advantages on the market.

In China, Recombinant Human Follitropin has been approved (1) to treat anovulation (including polycystic ovary syndrome, PCOS) that cannot be cured by Clomiphene Citrate; and (2) to be used for superovulation and follicular development by assisted reproductive treatment such as in vitro fertilization-embryo transfer (IVF-ET), gamete intrafallopian transfer (GIFT), and intracytoplasmic sperm injection (ICSI).

Merck Serono's Recombinant Human Follitropin (trade name: GONAL-f) was approved to be marketed in China in 2008, and GeneScience Pharmaceuticals Co., Ltd.'s Jinsaiheng was also approved in 2015. By the end of 2018, all the Recombinant Human Follitropin products in China were produced by Merck Serono and GeneScience Pharmaceuticals Co., Ltd. The sales value of Recombinant Human Follitropin kept rising after the drug was launched in China, reaching about CNY 548 million in 2017.

It is expected that the incidence of infertility will continue to grow as environmental pollution intensifies and Chinese people's lifestyle changes. Meanwhile, as the average childbearing age of Chinese women continues to rise and China's family planning policy is loosened, many older women plan to have a second child, which will drive the demand for Recombinant Human Follitropin in China. In the coming years, more companies' generic Recombinant Human Follitropin will be launched in China.

TOPICS COVERED:

Situation of infertility in China

Status of China's Recombinant Human Follitropin market

Competition on China's Recombinant Human Follitropin market

Prices of Recombinant Human Follitropin in China

Factors influencing the development of China's Recombinant Human Follitropin market

Prospect of China's Recombinant Human Follitropin market from 2018 to 2022

Progress of Recombinant Human Follitropin in China

Contents

1 RELEVANT CONCEPTS OF RECOMBINANT HUMAN FOLLITROPIN

- 1.1 Indications for Recombinant Human Follitropin
- 1.2 Development of Recombinant Human Follitropin in China
- 1.3 Governmental Approval of Recombinant Human Follitropin in China

2 SALES OF RECOMBINANT HUMAN FOLLITROPIN IN CHINA, 2013-2017

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

3 ANALYSIS ON MAJOR MANUFACTURERS OF RECOMBINANT HUMAN FOLLITROPIN IN CHINA, 2013-2017

- 3.1 Analysis on Market Share of Major Manufacturers of Recombinant Human Follitropin
 - 3.1.1 Market Share by Sales Value
 - 3.1.2 Market Share by Sales Volume
- 3.2 Merck Serono
 - 3.2.1 Profile of Merck Serono
 - 3.2.2 Sales of Merck Serono's Recombinant Human Follitropin in China
- 3.3 GeneScience Pharmaceuticals Co., Ltd.
 - 3.3.1 Profile of GeneScience Pharmaceuticals Co., Ltd.
 - 3.3.2 Sales of GeneScience Pharmaceuticals Co., Ltd.'s Recombinant Human Follitropin in China

4 PRICES OF RECOMBINANT HUMAN FOLLITROPIN IN CHINA, 2017-2018

- 4.1 Merck Serono (GONAL-f)
- 4.2 GeneScience Pharmaceuticals Co., Ltd. (Jinsaiheng)

5 PROSPECT OF CHINA'S RECOMBINANT HUMAN FOLLITROPIN MARKET,

2018-2022

5.1 Major Factors Influencing Development of Recombinant Human Follitropin in China

5.1.1 Favorable Factors

5.1.2 Unfavorable Factors

5.2 Forecast on Market Size

5.3 Forecast on Market Trend

Selected Charts

SELECTED CHARTS

Chart Governmental Approval of Recombinant Human Follitropin in China

Chart Sales Value of Recombinant Human Follitropin in China, 2013-2017

Chart Sales Value of Recombinant Human Follitropin in Parts of China, 2013-2017

Chart Sales Volume of Recombinant Human Follitropin in China, 2013-2017

Chart Sales Volume of Recombinant Human Follitropin in Parts of China, 2013-2017

Chart Sales Value of Recombinant Human Follitropin Injections in China, 2013-2017

Chart Sales Volume of Recombinant Human Follitropin Injections in China, 2013-2017

Chart Market Share of Major Manufacturers of Recombinant Human Follitropin by Sales Value in China, 2013-2017

Chart Market Share of Major Manufacturers of Recombinant Human Follitropin by Sales Volume in China, 2013-2017

Chart Sales Value of Merck Serono's Recombinant Human Follitropin in China, 2013-2017

Chart Sales Volume of Merck Serono's Recombinant Human Follitropin in China, 2013-2017

Chart Sales Value of GeneScience Pharmaceuticals Co., Ltd.'s Recombinant Human Follitropin, 2013-2017

Chart Sales Volume of GeneScience Pharmaceuticals Co., Ltd.'s Recombinant Human Follitropin, 2013-2017

Chart Prices of Merck Serono's Recombinant Human Follitropin (GONAL-f) in Parts of China, 2017-2018

Chart Prices of GeneScience Pharmaceuticals Co., Ltd.'s Recombinant Human Follitropin (Jinsaiheng) in Parts of China, 2017-2018

Chart Forecast on Sales Value of Recombinant Human Follitropin in China, 2018-2022

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