

Investigation Report on Chinese Valsartan Market, 2018-2022

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Abstracts

Description

Valsartan is an angiotensin II receptor antagonist which blocks the angiotensin II receptor type I (AT1), increases the plasma level of angiotensin II, stimulates unblocked AT2 receptor, and counteracts the effects of AT1 receptor to dilate blood vessels and lower blood pressure. Valsartan tablets are mainly used to treat mild to moderate primary hypertension.

The growing economy has greatly changed the life style and diet of Chinese people and led to the increasing incidence of hypertension in China. According to population size and structure, China has over 300 million hypertensive patients, over 1/3 of the global total. However, China has a wide gap with developed countries on hypertension control rate. The new edition of List of Medicines Covered by National Basic Medical Insurance contains 271 cardiovascular drugs including 144 Chinese and western drugs and 127 Chinese patent drugs. It's worth mentioning that there are 6 cardiovascular drugs among the 36 drugs included in the list in 2017 after the second government-enterprise negotiation.

According to CRI, the sales value of Valsartan was about CNY 537 million in 2017, a slight decrease over 2016. The sales volume increased while the average price fell, which doesn't mean shrinking market demand.

There are many Valsartan manufacturers in China while the concentration ratio is high. In 2017, over 90% market share by sales value was captured by Beijing Novartis Pharma Co., Ltd., Lunan Better Pharmaceutical Co., Ltd., Novartis and Changzhou Siyao Pharmaceutical Co., Ltd. The Valsartan (trade name: Diovan) produced by Beijing

Novartis Pharma Co., Ltd. took up over 85% of the Chinese market, and the domestic enterprises also gained some market share by price advantage. Many domestic pharmaceutical enterprises expect to scrabble for market shares from Novartis by advantage of lower prices. For example, in June 2018, Zhejiang Huahai Pharmaceutical Co., Ltd. obtained the production permit for Valsartan tablets (40mg, 80mg and 160mg) from CFDA.

It is estimated that the incidence of hypertension and the demand for Valsartan will continue to grow in China in the coming years.

Topics Covered:

Development environment of Valsartan in China

Sales of Valsartan in China, 2013-2017

Market share of major Valsartan manufacturers in China

Sales of Valsartan in different dosage forms in China

Average price of Valsartan in China

Average prices of major manufacturers' Valsartan in China

Prospects of Chinese Valsartan market

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