

Research Report on China's Diabetes Drug Market, 2013-2017

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Abstracts

Diabetes refers to a series of metabolic disorder syndrome such as sugars, proteins, fat, water and electrolyte that are triggered by islet dysfunction and insulin resistance, and the latter is caused by the actions of various pathogenic factors such as genetic factors, immune disorders, microbial infections and their toxins, free radical toxins, psychological factors on body. In recent years, with the development of China's economy and improvement in people's living standards, the incidence and morbidity rates of diabetes also present the increasing trend year by year.

In China, with the aggravation of aging degree, improvement in living standards and increase in obese groups caused by unhealthy lifestyles, the prevention and treatment of diabetes are increasingly severe. Since China carried out the first survey on diabetes epidemiology in 1980, the morbidity rate of diabetes increases from less than 1% then to about 10% currently. Following tumors and cardiovascular diseases, diabetes becomes the third-largest chronic disease severely threatening people's health. In 1994, diabetics only accounted for 2.5% of the population in China. This figure increased to 5.5% in 2002 and 9.7% in 2008.

In China, the diabetes morbidity rate of people aged above 20 has reached over 9.7%, and the morbidity rate of pre-diabetes (impaired fasting glucose and impaired glucose tolerance) has reached 15.5%. In developed regions of China, diabetics in the rural population are far less than that in the urban population. However, the morbidity rate of pre-diabetes, i.e., impaired glucose regulation, in the rural population is higher than that in the urban population, whether in developed or economically-backward areas. In economically-developed regions, the diabetes morbidity rate of the urban population is 13.6%, and that of the rural population is 16.6%. In medium-developed regions, the diabetes morbidity rate of the urban population is 15.6%, and that of the rural population

is 20%. This also shows that, with the development of economy and changes in lifestyles, the rural population are potential groups who are more likely to suffer from diabetes.

Drug treatment is the focus of the treatment of diabetes. In addition to a small part of patients with type II diabetes which can be controlled through diet therapy and exercise therapy, the rest all need drug treatment. Diabetes drugs include Chinese patent drugs and western drugs, of which the latter is in a dominant position, while the former is in an auxiliary position in the treatment of diabetes.

With the increase in diabetes morbidity rate, residents' income levels and medical levels, the market size of China's diabetes drugs rises year by year, which always presents a rapidly growing trend in recent years, reaching CNY 15.86 billion in 2011, with an increase of 18.2% YOY.

In China, insulin preparations are always leaders in diabetes drug market, and the market share grows year by year recently, reaching 37.75% in 2011, with promising market prospects. Acarbose ranked the second. Before 2010, the share declined year after year, which slightly rebounded in 2011. Market shares of other varieties are all very low, which cannot threaten the market positions of insulin preparations and Acarbose.

The market size of China's diabetes drugs is expected to maintain an annual growth rate of over 18% from 2013 to 2017.

More following information can be acquired through this report:

Incidence of Diabetes in China

Market Situation of China's Hospital-use Diabetes Drugs

Competition in China's Diabetes Drug Market

Development Trends of Diabetes Treatment Technologies and Market in China

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