

Research Report on China's Antihypertensive Medicine Market, 2012

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Abstracts

In recent years, with Chinese people's living standards continuously improving and elderly people increasing, prevalence rate of hypertension incessantly rises. Presently, there's still no effective means to cure hypertension. According to the WHO statistics about death of various diseases, death toll of cardiovascular disease which is represented by hypertension increases from 28.8% of the total mortality toll in 1997 to 36.0% in 2002. Hypertension is a serious danger to human health.

According to a press release issued by the International Society of Hypertension, the number of global hypertension or abnormally high blood pressure crowds reaches 972 million, accounting for 26.4% of the world's adult population. With the invention and application of CCB, ACEI, ARB and other new-generation antihypertensive medicines, the mortality rate of various cardiovascular diseases sharply declines. Nevertheless, there are still 17 million people across the world die from cardiovascular and cerebrovascular diseases caused by hypertension and half of them die from acute myocardial infarction and cerebrovascular embolism. So people pay high attention to antihypertensive medicine market.

Hypertension is defined referring to the large-scale epidemiological survey result. China respectively developed different diagnostic criteria and stages for four times in 1959, 1974, 1979 and 1999 aligning with different national conditions. In October 1999, by referring to the WHO/ISH hypertension treatment guidelines, the Chinese Hypertension League defined hypertension as SBP \geq 140mmhg and (or) DBP \geq 90mmhg without taking antihypertensive medicine and according to blood pressure levels, hypertension is divided into grades 1, 2, 3 which nearly matches light, moderate and severe levels used in the past. Revising diagnostic criteria for four times reflect that China cardiovascular physicians constantly deepen the awareness of hypertension prevention

and control and advance with the time. Recently, along with the release of JNC-7 and European hypertension prevention and control guidelines and the closure of some large-scale clinical trials, China will develop new hypertension prevention and treatment guidelines in accordance with national conditions.

In 2005, China Hypertension Guidelines defined blood pressure of 120~139/80~89 mmHg as normal high blood pressure while the United States JNC7 defined this level as pre-hypertension. Both countries pointed out that such crowds should be given lifestyle intervention, so as not to progress to hypertension.

In 2009, the Chinese Ministry of Health released the result of the fourth National Health Services Survey which showed that diseases of circulatory system, such as heart disease, cerebrovascular disease, hypertension, and so on significantly increased, among which doctor-confirmed cases of circulatory diseases amounted to 114 million, including patients with cerebrovascular diseases increased from 5 million to 13 million, patients with hypertension increased from 14 million to 73 million. Among the hypertensive patients, the treatment rate was only 24.7% and the control rate only 6.1% while most of the patients failed to receive effective treatment to reach the normal blood pressure. It is estimated that the actual population of patients with hypertension currently reaches 200 million with an average annual increase of over 3 million, and the annual expenses spent in treating hypertension is more than CNY 40 billion. In 2011, the market size of antihypertensive prescription medicine reaches 16.6 billion in China, with an increase of more than 20% YOY, and the market potential is huge.

In China, the increasing aging trend also means that the typical geriatrics, such as hypertension, stroke, coronary heart disease, and so on further endangers people's health. For the time being, the situation is that the medical technology is unable to thoroughly cure these chronic diseases, thus early positive intervention and preventive treatment are quite significant.

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Development Trend of China's Antihypertensive Medicine

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