

Research Report on Chinese Bio-pharmaceutical Industry, 2012

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Abstracts

In China, biological products consist of vaccines, blood products, cytokine, diagnostic reagents and other active agents (including toxins, antigens, allergen, and recombinant DNA products, etc.). In China, animal vaccine belongs to veterinary medicine rather than bio-pharmaceutical industry. "Bio-pharmaceutical" in the report only refers to human biological products.

Chinese biological product industry is an emerging industry which has only over 20 years of history. In 2011, the sales revenue of Chinese bio-pharmaceutical industry exceeded CNY 160 billion, accounting for less than 15% of the total sales revenue of pharmaceutical industry. However, with great potentials, the proportion of it keeps rising in Chinese pharmaceutical industry.

Because of the late launch of Chinese bio-pharmaceutical industry, the upstream technology lags behind that of developed countries for 5 to 10 years, while downstream technology lags behind that of developed countries for at least 15 years. Moreover, the products are mostly concentrated in low-end generic vaccines, blood product industry, and technological barriers are relatively low. Chinese bio-pharmaceutical industry still represents with mainly with small and medium-sized enterprises and the market concentration rate is low.

Although the scale of Chinese bio-pharmaceutical industry is small and the concentration rate is low, it has formed relatively completed industry chains. A number of small and medium-enterprises gather in the upstream R&D period, mainly providing R&D services for other large-scale pharmacy enterprises. In the production period, the overall production capacity of Chinese bio-pharmaceutical enterprises is high but the structure is not balanced. There is the phenomenon of the overcapacity of low-end

drugs and the deficiency capacity of high-end drugs.

Currently, the development of Chinese bio-pharmaceutical industry is mainly in face of the restrictions of policy environment, financing environment and industrial supporting, etc. It can be obviously seen in the following aspects: inadequate protection of intellectual property; limited financing channels; immature peripheral system of the industry, weak fundamental research of upstream, and blocked sales channels of downstream.

From the view of the development of present Chinese bio-pharmaceutical industry, the products are still mainly generic drugs and original drugs, and the ability of independent R&D is vulnerable. High-end generic drugs and CRO are the most promising ones to achieve the breakthrough in the short term. The similarities of the two drugs are fast increasing demand, bright prospects, and an obvious cost advantage of "made in China". The differences lie in that the future market of CRO may be relatively limited and it is weak to support the whole economy development, while the market of bio-generic drugs is wide and it is prominent to support the whole industrial development.

In the international market, the status of Chinese bio-pharmaceutical industry is rising in succession. The main reason is, on one hand, the rapid development of Chinese biotechnology. On the other hand, as the shifting of international pharmaceutical industry, many multinational bio-pharmaceutical enterprises begin to outsource drug research and development as well as production activities to China. Currently, more than 80 cities in China are about to establish medical technology parks. Nevertheless, the original research of Chinese bio-pharmaceutical industry and capital market are far lagging behind that in developed countries, which causes the duplication of production of low level and vicious competition. At present, the competition gradually has a tendency of new technologies and new fields. Due to the technology leadership in sub-industries, the competitiveness of China's Biotechnology Groups, Hualan Biological Engineering Co., Ltd., Shanghai Kehua Biological Engineering Co., Ltd., Beijing Tiantan Biological Products Co., Ltd. and Daan Gene Co., Ltd. in domestic bio-pharmaceutical industry are in leading positions.

In recent years, on the whole, the export of Chinese pharmaceuticals keeps a fast growing trend. It mainly benefits from high-level export scale of original drugs which have the price advantage. While developed countries have high standards in the import of biochemical drugs, but the international competitive strength of domestic biomedical products is poor so that the export scale and growth speed are always at a low level. In addition, since 2011, because of the obviously declining batch release of biological

products YOY influenced by the implementation of new version GMP, the export amount of biochemical drugs keeps a slow growth rate. Compared with chemical drugs, the scale and growth speed of bio-pharmaceuticals are still small and slow.

Under the influence of positive factors such as rapid growth of Chinese economy, rising of residents' income and improving of residents' cognition and needs for biopharmaceuticals, the market of Chinese bio-pharmaceutical industry is gradually enlarging and the status in the national economy is constantly improving, which is increasingly becoming the potential industry in the view of investors.

Through this report, more following information can be acquired:

Current Situation of Chinese Bio-pharmaceutical Industry

Current Situation of Chinese Bio-pharmaceutical Sub-industries

Market Competition of Bio-pharmaceutical Industry

Import and Export of Bio-pharmaceutical Industry

Development Trend of Bio-pharmaceutical Industry

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