

Research Report on Chinese Monoclonal Antibody Industry, 2012

<https://marketpublishers.com/r/R0ECDC5651EEN.html>

Date: March 2012

Pages: 50

Price: US\$ 3,000.00 (Single User License)

ID: R0ECDC5651EEN

Abstracts

Antibody medicine is generally obtained from monoclonal antibody through genetic engineering, possessing the advantages of strong targeting and few drug side effects. At the present time, it is mainly used for the cure of tumor and immune system diseases and has good application prospects in clinical treatment. From the point of the global market, antibody medicine accounts for over 40% of the entire biotechnology medicine. With constant growth of the market share, antibody medicine has become the most important part of the biotechnology medicine, and monoclonal antibody medicine is the best-selling product in the antibody medicine. In 2010, in the 10 world's best-selling drugs, monoclonal antibody medicine took up 5, and the market sales revenue of each single product all exceeded USD 5 billion.

In recent years, with the rapid growth of the market scale of monoclonal antibody medicine, the sales revenue of global monoclonal antibody preparation surpassed USD 40 billion in 2010. Among them, Roche (and its Genentech) is the leading enterprise of monoclonal antibody products, owning 7 listed kinds of products as the largest one, including some critical products such as Avastin, Herceptin and Mabthera. In 2010, sales revenue of major monoclonal antibody products surmounted to USD 20 billion. Monoclonal antibody medicine will be the main driving force of the development of biological medicine in the next few years.

In recent years, Chinese bio-pharmaceutical industry develops very fast. However, the level of antibody medicine is far below the average international level. The sales revenue accounts for less than 3% of the overall biological drug share. Now, Chinese antibody medicine market is in its initial stage. With the introduction of humanized products developed by CITIC National Health and Baitai Biological Pharmaceutical Co., Ltd., the type of China-made monoclonal antibody products enter upgrading phrase.

Although fully China-made humanized products have not been released yet, the future mainstream of monoclonal antibody products will mainly be humanized and fully humanized products in China.

Monoclonal antibody still belongs to high-end products in Chinese market, mainly depending on imports. Roche is the biggest winner in monoclonal antibody market, and the products with the largest market share; Rituximab and Trastuzumab, are from Roche Group. Merck and Novartis also occupy a big share. Take Rituximab and Trastuzumab as an example, which are produced by Roche and came into the market in earlier time, the sales revenue were only CNY 17.7 million and CNY 2.7 million respectively in sample hospitals in 2003. However, in 2008, the sales revenue reached CNY 212 million and CNY 114 million respectively. Sales revenue of Etanercept, a domestic product in China amounted to CNY 0.4 billion in 2010, and the net profit was nearly CNY 0.2 billion. The profit margin is far more than other biopharmaceuticals.

In recent years, monoclonal antibody market in China develops rapidly, with new products introduced constantly. Therefore, market shares of various medicines are changing constantly. It is expected that new products will be continuously introduced into market in the next few years, and the market structure will have further depth adjustment. However, the big trend that monoclonal antibody product has good application prospects in clinical treatment and plays an essential role in the cure of tumor and other related fields will not change. It is estimated that, in recent years, yearly scale of Chinese monoclonal antibody market will be up to CNY 10 billion to CNY 20 billion.

More following information can be acquired through this report:

Development Course of Chinese Monoclonal Antibody Market

Competition in Chinese Monoclonal Antibody Market

Research and Development of Chinese Monoclonal Antibody Market

Major Monoclonal Antibody Production Enterprises in Chinese Market

Hot Products of Chinese Monoclonal Antibody Market

Prediction on Chinese Monoclonal Antibody Market

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