Heparin Industry in China - 2015

Description: Currently there are 4 major products in the global low molecular heparin preparation market: SNY's enoxaparin sodium, Pfizer's dalteparin sodium, GSK's nadroparin calcium and LEO's tinzaparin sodium. Among which, enoxaparin remains the best-selling product even though its sales amount continued to decline in recent years.

Though enoxaparin always dominates the international heparin preparation market, low molecular heparin calcium is more competitive in China. Low molecular heparin calcium ranked the first position in the usage among sample hospitals in 2014, and has achieved a CAGR of 23% in the past 8 years. Moreover, enoxaparin, heparin sodium and low molecular heparin sodium ranked from 2nd to 4th respectively. These 4 products account for 63.6% in the Chinese anticoagulant market in 2014.

There are 7 major players in the Chinese low molecular heparin calcium market, 6 of them are domestic enterprises. Enoxaparin sodium was imported from SNY in 2003 and in 2006 the generic drug produced by Jiuyuan Gene Engineering Co., Ltd came into market. Currently there are 4 domestic enterprises with volume production. The sales amount of enoxaparin in city public hospitals reached RMB 153 million in 2014.

In 2014, GSK, Changshan Biochemical Pharmaceutical and Hefei Zhaoke were top 3 enterprises in the domestic low molecular heparin calcium market, with total market share of 88.7% in 2014. GSK is the leading enterprises in this segment for a long time, but its growth has slowed down in recent 2 to 3 years. Changshan's product achieved rapid development relying on independent pricing, which is gradually becoming the import substitution product.

In May 2015, Qianhong Bio-Pharma received the approval letter of enoxaparin sodium API and injection from CFDA. This made Qianhong the 5th enterprises for producing enoxaparin sodium in the domestic market. (Time to volume production is still uncertain).

In July 2015, Dongcheng became the third enterprise that get approval of nadroparin, the other two are GSK (RLD) and Nanjing King-Friend (in April 2015). This is the company's first low molecular heparin preparation product.

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Contents:

1. Executive Summary
1.1 Definition & Classification
1.2 Industry Chain

2. Global Heparin Market
2.1 Supply & Demand
2.3 Market Competition
2.4 Market Forecast

3. Development of Heparin API Industry in China
3.1 Development Environment of Heparin Industry in China
3.1.1 Related Policies
3.1.2 Technical Requirements
3.1.3 Capital Barrier
3.2 Market Status
3.3 Market Supply & Demand
3.4 Competition Pattern
3.5 Import & Export
3.5.1 Export
3.5.2 Import
3.6 Development Prospect and Forecast
4. Development of Heparin Preparation Industry in China
4.1 Market Size
4.2 Low Molecular Heparin Preparation
4.2.1 Low Molecular Heparin Calcium Preparation
4.2.2 Low Molecular Heparin Sodium Preparation
4.3 Unfractionated Heparin Preparation
4.4 Development Prospect and Forecast

5. Key Heparin Enterprises in China
5.1 Hepalink
5.1.1 Profile
5.1.2 Operation
5.1.3 Revenue Structure
5.1.4 Gross Margin
5.1.5 R&D and Investment
5.1.6 Clients and Suppliers
5.1.7 Heparin Business
5.2 Qianhong Bio-Pharma
5.2.1 Profile
5.2.2 Operation
5.2.3 Revenue Structure
5.2.4 Gross Margin
5.2.5 R&D and Investment
5.2.6 Clients and Supplies
5.2.7 Heparin Business
5.2.8 Prospective
5.3 Dongcheng Biochemicals
5.3.1 Profile
5.3.2 Operation
5.3.3 Revenue Structure
5.3.4 Gross Margin
5.3.5 R&D and Investment
5.3.6 Clients
5.3.7 Heparin Business
5.3.8 Prospective
5.4 Changshan Biochemical Pharmaceutical
5.4.1 Profile
5.4.2 Operation
5.4.3 Revenue Structure
5.4.4 Gross Margin
5.4.5 R&D and Investment
5.4.6 Clients and Suppliers
5.4.7 Prospective
5.5 Tianjin Chase Sun
5.5.1 Profile
5.5.2 Operation
5.5.3 Revenue Structure
5.5.4 Gross Margin
5.5.5 R&D and Investment
5.5.6 Clients and Suppliers
5.5.7 Heparin Business
5.5.8 Prospective
5.6 Nanjing King-Friend
5.6.1 Profile
5.6.2 Operation and Prospective
5.7 Jiangsu Wanbang
5.7.1 Wanbang Biopharmaceuticals
5.7.2 Operation and Prospective
5.8 Hefei Zhaoke
5.8.1 Profile
5.8.2 Operation
5.8.3 Heparin Business
5.9 Sciprogen
5.9.1 Profile  
5.9.2 Operation  
5.9.3 Heparin Business  
5.10 Hainan Unipul Pharmaceutical Co., Ltd.  
5.10.1 Profile  
5.10.2 Operation  
5.10.3 Heparin Business  
5.11 Hangzhou Jiuyuan Gene Engineering Co., Ltd.  
5.11.1 Profile  
5.11.2 Operation  
5.11.3 Heparin Business  
5.11.4 Techpool  
5.11.5 Profile  
5.11.6 Operation  
5.11.7 Heparin Business  
5.11.8 Techpool  
5.11.9 Profile  
5.11.10 Operation  
5.11.11 Heparin Business  
6. Industry Main Indicator  

List of Tables and Figures:  
Application of Heparin Preparations  
Heparin Industry Chain  
Market Size of Heparin Preparation Worldwide and YoY Growth, 2006-2014  
Performance Comparison Between Low Molecular Weight Heparin Preparation and Unfractionated Heparin Preparation  
Market Size of Global Heparin Preparations by Product, 2010-2014  
Regional Distribution of Heparin Preparations Worldwide, 2014  
Global Heparin API Demand and YoY Growth, 2007-2014  
Major Heparin Preparation Producers Worldwide  
Sales of Major Heparin Preparation Brands Globally, 2010-2014  
Global Market Size of Heparin Preparations, 2012-2016  
Global Demand for Heparin API, 2011-2016  
Gross Margin of Major Heparin API Producers in China, 2008-2015  
Pig Slaughtering Volume and Breeding Stock in China, 2008-2014  
Capacity of Heparin Crude Products in China, 2008-2014  
Export Average Price of Heparin and Salt in China, 2008-2014  
Capacity, Sales Volume and Certification of Major Heparin API Enterprises in China, 2014  
Top 10 Export Destinations of China's Heparin and Its Salts by Export Value, 2012-2015  
Top 10 Export Enterprises of Heparin and Its Salts in China by Export Value, 2014  
Import Volume, Import Value and Unit Price of Heparin and Its Salts in China, 2008-2015  
Market Size of Heparin Preparations in China and YoY Growth, 2007-2014  
Market Share of Heparin Preparations in China by Product, 2014  
Market Size of Low Molecular Weight Heparin Preparation in China, 2009-2014  
Major Low Molecular Heparin Calcium Preparation Enterprises in China and Their Bidding Prices, 2014  
Distribution of Low Molecular Heparin Calcium Market in China by Enterprises  
Major Low Molecular Heparin Sodium Preparation Enterprises in China and Their Bidding Prices, 2014  
Major Heparin Sodium Preparation Enterprises in China and Their Selling Prices, 2008-2014  
Market Size of Heparin Preparation in China and YoY Growth, 2012-2016  

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