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 accounts for 63.6% in Chinese anticoagulant market in 2014.

There are 7 major players in 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 top3 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 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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