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Market Research of Diabetes and its Treatment Medicine-Insulin in China, 2008

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Report Summary

According to IMS statistics, in 2007 the scale of global anti-diabetes drug market was \$24.1 billion, up 13.7 per cent year-on-year, ranking No.5 of the global pharmaceutical market and is expected to have 15 to 20 per cent growth in the future.

According to the International Diabetes Federation (IDF) report that China had 39.8 million people have diabetes in 2007, ranking No.2 in the world, with a total morbidity of 3.1 per cent and is expected in 2025 will reach 59.3 million, 2.6 times than 1990, the annual growth rate is 10%, the average annual net increase of 1.5 million.

In terms of the current trend of diabetes in the developing countries, that the prediction of IDF is relatively conservative, the fact is the growth of diabetics is expected to be further great in the future in China; the reasons are, firstly, China has a large population and the growth is relatively fast; Secondly, the aging of the population has grown greatly; thirdly, the speed up of urbanization process which affected people's lifestyle, less physical activity and eat more junk food lead to people's overweight and obesity.

From 2002 to 2006, China's diabetes drug market had been steady growth; its average annual growth rate was 12% and in 2007 reached 7.495 billion yuan, an increase of 20.98 per cent than 2006, which was 6.195 billion yuan.

The growth of Insulin's sales and its similar drugs is the main driving force for the expansion of China's diabetes drug market. In 2007 the sales of insulin and analogue reached 1.919 billion yuan, up 55.81 per cent year-on-year, accounting for 33.61 per cent of China's diabetes drug market, increased 2.24 per cent than 2006. Although the market share of insulin and its analogues have increased gradually, but still less than the average level of global market which is 40.1 per cent, therefore, there is still plenty room for the development of China's Insulin market.

Tonghua Dongbao is a leading medicine company in China; its insulin is the only domestic insulin on the directory of China national health insurance B drug. In terms of the national health insurance system, A drug is able to 100 per cent apply for reimbursement and B drug is apply for reimbursement in proportion. Generally, foreign and domestic insulin is hardly to enter the list of A drug; this is a advantage of Tonghua Dongbao's insulin in terms of its low price, insulin is a lifelong drug and price is considered more sensible by most patients, as in the similar consequence of various drugs, perhaps patients are more like to choose Tonghua Dongbao's insulin which is 30 per cent cheaper than foreign insulin. From 2008, the central government and local governments will invest more to improve the national health insurance system. 60 per cent market of Tonghua Dongbao's insulin is in second-line cities, where piece is the most sensitive factor for patients; therefore, Tonghua Dongbao's insulin will be their first choice.

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