

# china



value of insight

a consulting & publishing company

## Table of Contents

<b>Healthcare System</b> .....	<b>5</b>
Health Reforms .....	8
<b>Pharmaceutical Market</b> .....	<b>10</b>
Market Profile and Structure .....	11
<i>Product Segments</i> .....	14
<i>Market Access</i> .....	15
<i>Market Fragmentation</i> .....	16
<i>Impact of 2009-2011 Health Reforms</i> .....	16
Market Performance and Forecasts .....	17
<b>Regulatory</b> .....	<b>17</b>
<a href="http://eng.sfda.gov.cn/WS03/CL0767/61640.html">http://eng.sfda.gov.cn/WS03/CL0767/61640.html</a> .....	18
<b>Approval Procedures</b> .....	<b>18</b>
Provisional vs. Final Standards.....	20
<b>Pricing</b> .....	<b>20</b>
<b>Payment</b> .....	<b>21</b>
NRDL .....	22
EDL .....	22
Hospitals and Tendering Systems .....	23
<b>Generics</b> .....	<b>23</b>
<b>R&amp;D / Clinical Trials</b> .....	<b>24</b>
<b>Manufacturing</b> .....	<b>27</b>
<b>Distribution</b> .....	<b>29</b>
<b>Patent &amp; Intellectual Property Issues</b> .....	<b>30</b>
The Monitoring Period .....	32
Provisional vs. Final Standards.....	32
Compulsory Licensing .....	33
<b>Marketing</b> .....	<b>33</b>
Marketing Regulations.....	33
Marketing Practices .....	35

**Table of Figures**

Figure 1 – Population and Economic Statistics ..... 5  
Figure 2 – General Healthcare Statistics..... 5  
Figure 3 – Health Insurance Coverage in China 2011 ..... 7  
Figure 4 – Demographic Profile ..... 10  
Figure 5 - Pharmaceutical Market Snapshot..... 10  
Figure 6 - Chinese Cities by Tier..... 13  
Figure 7 - Top 10 Pharmaceutical Companies (Q1 2012) ..... 14  
Figure 8 - Share of Market Value by Drug Type (Western Drugs: 2009-2011)..... 14  
Figure 9 - Procedures and Timeframe for Market Access in China ..... 15  
Figure 10 - Drug Approval Procedures & Timing..... 19  
Figure 11 - Generics Share of Market Value and Volume Forecasts (2010-2015) ..... 24  
Figure 12 - Clinical Trial Regulatory Approval Process ..... 26  
Figure 13 - Top 10 Pharmacy Chains 2011 ..... 30  
Figure 14 - Promotional Spending by Type 2011..... 35  
Figure 15 – Promotional Spending by Company 2011..... 36