



王玉梅 著

中国医药产业 成长障碍

· Z H O N G G U O ·

Y I Y A O C H A N Y E

CHENGZHANGZHANGAI

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献给

我的父亲和母亲！

内 容 提 要

医药产业是我国发展最快的产业之一。1978年至2004年产值年均递增18%，高于同期全国工业和GDP的增长速度，同时也高于世界发达国家中主要制药国近30年来的平均年递增13.8%的水平。然而，我国是世界制药大国而非制药强国，我国医药产业目前的状况令人担忧：技术创新能力薄弱，严重缺乏拥有自主知识产权的产品，是以增加资本投入为主的粗放型增长方式；产业组织分散，产业集中度低下，产业利润增幅明显回落，产业发展的高速度并没有带来利润增长的高速度；产业政府规制陷入窘境，连续10年20次高频率大幅度的药品降价政策依然未能解决药价“虚高”问题等等。

医药产业，救人亦应自救。把脉中国医药产业，在中国经济转型时期的大环境下，它的成长进程中究竟存在哪些痼疾阻碍其健康发展？应开怎样的良方促使它强身壮骨，茁壮成长？本书通过对我国医药产业成长主要障碍因素进行系统剖析，希望能为我国医药产业健康成长提出有益的建议。本书以产业成长理论、产业组织理论和产业竞争力理论为基础理论，通过对我国医药产业成长过程的全面梳理，分析了我国医药产业成长的规律特征，对我国医药产业成长过程中

的技术进步、产业组织和政府规制等方面存在的障碍因素进行了系统研究,提出了相应的提升产业竞争力、促进产业健康成长的对策建议。

全书分为三大部分,共八章。

第一部分包括第一章、第二章,是本书的基础理论部分。主要是提出问题,对相关理论进行综述与分析,为全书的展开提供理论基础。

第二部分包括第三章至第七章,是本书的重点。其中第三章介绍分析了医药产业的特性,论述了世界医药产业的发展现状和趋势。第四章回顾了我国医药产业的成长阶段,着重分析了转型阶段我国医药产业在行业结构、所有制结构、产品结构和区域结构方面的特征,并阐述了我国医药产业的国际地位。第五章运用柯布-道格拉斯生产函数法对我国医药产业技术进步进行了测算,测算结果表明增加资本投入对医药产业产出增长的贡献份额高达 72.54%,远远大于技术进步和劳动力增长对经济增长的贡献,是推进我国医药产业产出增长的第一位因素,证明了我国医药产业是以增加资本投入为主的粗放型增长方式,进而从研发投入水平、研发产出水平和研发组织形式三方面揭示了阻碍我国医药产业技术进步的深层原因。第六章运用 SCP 理论框架,通过翔实的数据资料,分别从市场结构、市场行为和经济绩效角度研究我国医药产业组织状况,找出我国医药产业成长中产业组织方面存在的障碍,重点分析了我国医药企业并购行为,总结了其特点,指出了并购行为中存在的问题。第七章从我国医药产业管理制度的演进和转变入手,分别对我国医药产业政府规制的主要内容(市场准入制度、药品质量安全管制制度、

药品价格管制制度、药品流通秩序管制制度、知识产权保护制度和药品监督管理体制)进行了详细而深入的剖析,指出政府规制中存在的种种缺陷及其对产业成长的不利影响,运用对比和横向比较方法分析了发达国家医药产业规制的特点以供借鉴。

第八章是本书的第三部分,对应第五章、第六章和第七章的内容,提出了促进我国医药产业健康成长的对策建议,即加强技术创新、优化产业组织、完善制度环境。提出我国医药产品研发必须走模仿创新和自主创新相结合的技术创新之路,既要重视非专利药物的研究和开发,又要加紧研制有自主知识产权的新产品,提升技术进步贡献份额,尽快由资本投入推动型经济增长方式向技术推动型经济增长方式转变,保证我国医药产业的可持续发展;提出完善并购、加强品牌、实施“走出去”、打造产业集群和实施“绿色药业”战略;认为我国的医药产业是一个竞争性的又具特殊性的产业,我国政府必须实行一定的政府管制,以达到有效竞争、提高劳动效率和保护消费者利益的目标。建议转型阶段的医药产业政府规制改革走松紧结合的道路:一方面逐步放松原计划经济体制时期所遗留下来的高度的计划管制,另一方面逐步建立起适应社会主义市场经济体制、符合国际惯例、符合医药产业特性的规制政策与制度。以药价管理政策为切入口,提出实行“四项改革”:改革医疗卫生体制、改革药品流通体制、改革医疗保险体制、改革政府管理体制,为我国医药产业健康成长营造一个良好的制度环境。

ABSTRACT

Pharmaceuticals are special merchandise, which are concerned with human' existence and health, so the pharmaceutical industry is closely connected with people's lives and health, and is called as "Forever Sunrise Industry". The pharmaceutical industry plays a significant role in each country's industry system and economic development, therefore having a great social and economic benefit, and being the important part of a nation's economy.

The pharmaceutical industry made the most rapid development among all industries in our country. From 1978 to 2004, its annual value of production increased at an average rate of 18%, higher than that of all other nation industries and GDP in the same period, and 13.8% of average annual growth of the major pharmaceutical production country in the developed countries. Our country has become one of the pharmaceutical markets that developed most rapidly, but our country is only a big pharmaceutical country instead of a pharmaceutical power in the world. The current situation of our pharmaceutical industry is worrying: our country's technology innovation ability is weak, and products with proprietary intellectual property

are seriously lacking; the industry organized dispersedly, so the industry concentration is rather low; the increase in industry profits shows a evident turn down, and the rapid industry development did not realize rapid profit growth; the government's industry rules and regulations have a dilemma. Large-scale and frequent policies to lower the pharmaceutical price have been carried out 16 times within 8 consecutive years, but the pharmaceutical price bubble is still not resolved. The centralized tendering and purchasing of pharmaceuticals failed to reach its original aim of preventing the bad practices in pharmaceutical purchase and sales, but bred the new corruption instead.

During China's economic transitional period, what are the main barriers preventing our pharmaceutical industry from its healthy development? What measures should we do to ensure its healthy development? This article will try to provide our pharmaceutical industry with some beneficial advice by analyzing the main barriers in the pharmaceutical industry development. With the theories of industry development, industry organization, and industry competition capacity as the basic theory, the article will raise some solutions and advice to promote the competition capacity and healthy development of our country's pharmaceutical industry by fully examining its development process, analyzing the laws and features of its development, systematically researching the barriers of technology advance, industry organization, and government regulations in the development.

The article is organized in three parts, in a total of eight chapters. The main content is as follows:

Part one includes the first two chapters, and is the basic theory part. In this part, the main problems will be put forward, and some relevant theories will also be summarized and analyzed, so as to present a theory basis for further discussion.

Part two includes the articles of three to seven. It is the key part in the article, among which in chapter three we will analyze the features of pharmaceutical industry, and describe the current situation and future trend of pharmaceutical industry development;

In chapter four, we will review the growth stage of our country's pharmaceutical industry, and put an emphasis on some features of the pharmaceutical industry in the transformation stage, such as the industry structure, ownership structure, product structure, and region structure. Also the international status of our pharmaceutical industry will be discussed here;

In chapter five, the Cobb-Douglas production function will be used to calculate the technology progress made by our pharmaceutical industry, and the result shows that capital investment has made a 72.54% contribution rate to our pharmaceutical industry development, which is far exceeding the contribution of technology and labor growth, so it is the first driving factor of pharmaceutical industry growth, with the technology advance being the second one. The results also proved that our pharmaceutical industry presents extensive growth,

with capital and labor as main input. Based on these facts, the article will analyze the in-depth reasons which prevent the technology advance of our pharmaceutical industry from three perspectives, namely, the input level of research & development, the output level research & development, and its organization format.

In chapter six, SCP theory frame and adequate data will be used to research the status quo of our pharmaceutical industry from market structure, market conduct, and economic performance, in order to find the obstacles in the industry organization. The merger and acquisition action in the pharmaceutical industry is the key in our analysis, and some problems will be found by summing up their features.

From the perspective of evolvement and development of management system of pharmaceutical industry, the chapter seven covers a detailed and in-depth analysis on the main aspects of the government rules and regulations on the pharmaceutical industry, such as market access system, safety control system on pharmaceutical quality, pharmaceutical price control system, order control system on pharmaceutical circulation, protection system of intellectual property, and pharmaceutical supervision and administration system, and points out kinds of defects in government rules and regulations, and its adverse impacts on industry development, and introduces and examines some features of rules and regulations of the pharmaceutical industry in developed countries by contrasting and parallel comparison.

Chapter eight is part three. Based on chapter five, six, and seven, some solutions and advice will be put forward, such as enhancement of technology innovation, optimization of industry organization, perfection of system environments. Also, some strategies will be brought about here, such as the combination of independent innovation with imitating innovation, perfection of merge & acquisition, enhancement of brand strategy, implementation of "go out" strategy, the industry Clusters strategy, and the "green pharmaceutical" strategy. It is confirmed that our country's pharmaceutical industry is a competitive industry, but it has its own special character, so the government may have to exercise some degree of government control, so as to realize the aim of effective competition, high productivity, and protection of consumers' benefits. It is suggested that both the loose and tight rules and regulations shall be used in the pharmaceutical industry reform: to gradually loosen the highly planning regulation that is the legacy of the former economic system, and on the other hand, to gradually establish a regulation policy and system that will be in accordance with the socialism market economic system and the international practice. With the pharmaceutical price management policy on the cutting point, it is suggested to implement "four reforms": medical and health system reform, pharmaceutical circulation system reform, medical and insurance system reform, and government administration system reform, so as to create a good system environment for the healthy development of our country's pharmaceutical industry.

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第一章 导 言

第一节 研 究 意 义

药品是一种特殊的商品,关系到人类的生存和健康。医药产业与人们的生命健康息息相关,被称为“永远的朝阳产业”。从全球范围看,1970 年全球药品销售总额为 218 亿美元,到 2002 年已猛增至 4 006 亿美元,并且以每年 7% 的幅度递增,2004 年全球药品销售总额达到 5 500 亿美元,该产业迅猛的增长速度由此可见一斑,向世人昭示着其永不衰落的朝阳产业的特征。医药产业作为按国际标准划分的 15 类国际化产业之一,在各国的产业体系和经济增长中都起着举足轻重的作用,具有重大的社会效益和经济效益,是一个国家经济的重要组成部分。因此,医药产业成为世界各国广泛重视并大力发展、相互展开激烈角逐的一个焦点。

医药产业是我国发展最快的产业之一。1978 年至 2004 年产值年均递增 18%,高于同期全国工业和 GDP 的增长速度,同时也高于世界发达国家中主要制药国近 30 年来的平均年递增 13.8% 的水平。就生产能力而言,我国在世界上首屈一指:我国可生产化学原料药 1 500 多个品种,年产量达 79.4 万吨,其中近二分之一出口,占全球原料药贸易额四分之一左右。

但是,我国是世界制药大国非制药强国。2004 年全球医药

市场销售额为 5 500 亿美元,其中美、欧、日三大市场占了 88%,我国为 95 亿美元,只占全球销售额的 1.7%;中国是中药的鼻祖,但目前国际中药市场年 160 亿美元的销售额中,日本产品占 80%,韩国产品占 10%,印度、新加坡等国家占 7%。我国仅占 3%左右,约 5 亿美元,其中绝大多数还是原料初级品,中成药则大多以食品添加剂的形式出口。与此同时,从我国进口中药材的日本、韩国、西欧等国家和地区加工生产的“洋中药”却以每年 30% 的增速涌入我国。原本我们引以为豪的“国之瑰宝”——中药,已经逐渐失去了庞大的国际市场。这种现实与我国作为植物药的主要发源地及历史悠久的中药大国地位极不相称。我国的医药业在迅猛发展的同时,应如何提高产业竞争力,在国际市场的大蛋糕中赢得更大的份额?这是值得我们认真思索的问题。

尤其自 1999 年至今,我国医药产业机遇与挑战并存,进入至关重要的转型期。产业成长的国内外环境发生了变化:国家经济发展政策逐渐由“改革开放”转变为“开放改革”,即以开放推动新一轮的改革;鼓励国内企业充分利用扩大开放的有利时机,增强开拓市场、技术创新和培育自主品牌的能力;推进政治体制改革,理清行政审批制度,切实把政府对经济的管理职能转变到为市场服务和创造良好发展环境上来;调整社会利益的分配办法,在坚持“效率优先,兼顾公平”的前提下,加大各种生产要素按贡献参与分配的比例;我国加入 WTO 后,政府与企业面临的首要冲击来自竞争规则的改变。遵守国际竞争规制是中国医药企业参与国际竞争的硬约束,是与其他世贸组织成员同场竞技的先决条件。国际竞争规则形成了有效的“倒逼机制”,促使我国政府对医药产业的规制制度进行完善与创新。因此,与中国经济一样,我国医药产业也处于转型时期:正逐步由计划