

The Introduction of Bio-pharmaceutical Industry in Jiangsu Province

Jiangsu Province has consistently emphasized its industrial foundation and strengths, continuously optimizing industrial layout and expanding industrial scale. Revolving around the complete chain from pharmaceutical R&D to manufacturing, Jiangsu Province's bio-pharmaceutical industry demonstrates a distinct trend of clustering, specialization, and differentiation. This has formed a relatively complete regional ecosystem, with bio-pharmaceutical industrial parks becoming the leading force in innovation development in Jiangsu's bio-pharmaceutical industry.

1. Forerunner in the Country

Jiangsu province's industrial scale ranks at the forefront nationally, forming a relatively complete industrial development system that includes bio-pharmaceuticals, chemical medicines, traditional Chinese medicines, medical devices, auxiliary materials, and packaging materials, etc. This has resulted in a development pattern where the value chain, industrial chain, spatial chain, and

innovation chain progress in tandem. The competitiveness of enterprises continues to strengthen, with a number of leading companies emerging that have competitive advantages nationally.

2. Distinct Advantages in Key Areas

The innovation capability in bio-medicine is outstanding, with cell therapy, new vaccines, and other fields keeping pace globally. Multiple technological areas such as antibody drugs and small molecule targeted drugs are leading domestically. Among the 4 domestically approved monoclonal drugs (PD-1) in China, 2 come from Jiangsu. The medical device industry, both in terms of scale and the number of product registrations, maintains a leading position nationally. It holds certain advantages in sub-fields such as medical imaging, vitro diagnostics, orthopedic implants, and home rehabilitation equipment. The chemical formulation industry leads the nation in scale, particularly in sub-fields such as anti-tumor, anti-hepatitis, cardiovascular, digestive system, and anti-psychotic drugs. Traditional Chinese medicine enterprises lead in standardization and intelligent construction

nationwide, owning more than 30 leading varieties with sales exceeding 100 million RMB each.

3. Continuously Enhanced Innovation Capability

The innovation carriers are gradually being perfected, with over 300 innovation platforms in Jiangsu province, including the National Biomedical Technology Center of Technology Innovation for Biopharmaceuticals and China Academy of Chinese Medical Sciences (CACMS) as national-level entities settling in Jiangsu. In 2023, 13 parks in Jiangsu province were selected among the top 50 national bio-pharmaceutical industrial parks in comprehensive competitiveness, accounting for more than a quarter of the total nationwide and ranking first nationally for five consecutive years. Parks like Suzhou Industrial Park, Nanjing Biotech and Pharmaceutical Valley, Taizhou Medical High-tech Zone, Taizhou City, Nanjing Jiangning High-tech Development Zone, and Lianyungang High-tech Industrial Development Zone all rank among top 20.

4. Distinct Trend in Agglomeration

Currently, Jiangsu province has preliminarily formed an industrial development pattern of "One Valley" (Nanjing Biotech and Pharmaceutical Valley), "One City" (China Medical City, Taizhou), "One Port" (China Pharmaceutical Port, Lianyungang), "One Park" (BioBAY), and "Multiple Poles" (specialized industrial clusters in bio-pharmaceutical and medical device in Wuxi, Xuzhou, Changzhou, Nantong, Zhenjiang, etc.). The degree of industrial agglomeration continues to increase, and regional division of labor continues to optimize, forming a spatial layout of dislocation competition and differentiated development. This provides strong support for accelerating the cultivation of advanced manufacturing clusters in Jiangsu's pharmaceutical industry.

