

China Blood Product Industry Report, 2016-2019

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Abstracts

Recombinant blood products have developed for many years in foreign countries, but China's blood products are still proteins extracted from human blood. Thus, reserves and control of plasma resources are the key to the development of Chinese blood product enterprises. Amid the industrial prosperity and favorable policies, China had more than 190 plasma collection stations with the production-use plasma volume of 4,700 tons and the total lot release volume jumped by 3.36 million bottles year on year to 55.76 million bottles in 2015.

Given stringent requirements on new domestic plasma stations, Shanghai RAAS, China Biologic Products (Shandong Taibang and Guizhou Taibang), Hualan Biological Engineering, Tiantan Biological (including Chengdu Rongsheng) and Yuanda Shuyang which boast abundant capital, powerful R&D strength and rich plasma station resources have become the top five companies in China blood product industry, contributing 61.9% to China's production-use plasma volume in 2015.

From the point of view of the product structure, human albumin is still the largest type of blood products in China, but its supply has slowed down with a lower contribution 58.8% to China's total blood product lot release volume in 2015. In recent years, the rising lot release volume of Chinese human albumin is mainly attributed to ample supply of imported products. In 2011-2015, the lot release volume of human albumin imported by China grew at a CAGR of 23.7%, accounting for as much as 55.6% of the total. China's top four human albumin import enterprises --- Behring, Baxter, Grifols and Octapharma seized 50.7% of the total lot release volume in 2015.

China's second largest type of blood products -- human immunoglobulin (ph4) for intravenous injection saw its lot release volume jump by 31.5% year on year to 9.4 million bottles (2.5g / bottle) and its share increase to 16.9% in 2015. Over the same period, tetanus human immunoglobulin, hepatitis B immune globulin and other immune

globulin products and coagulation factor products witnessed growth in lot release volume except human rabies immunoglobulin whose lot release volume declined slightly.

The research and development of human blood coagulation factor VIII, human prothrombin complex and other small products in rigid demand has made the most remarkable progress in recent years. Concerning human blood coagulation factor VIII, Shanghai Xinxing had been approved to launch its human blood coagulation factor VIII, Shenzhen Weiguang had entered the new drug registration stage, Guangdong Shuanglin Bio-Pharmacy had embarked on trial production, Jiangxi Boya Bio-Pharmaceutical had gone into clinical phase III (the industrialization is expected in H2 2016), Wuhan Zhongyuan Ruide had obtained clinical approval and Harbin Pacific Biopharmaceutical had applied for clinical approval by the end of 2015.

In order to possess and effectively use plasma raw materials, enterprises are more willing to cooperate mutually in addition to acquisition. In August 2015, China Biologic Products and Xinjiang Deyuan signed a strategic cooperation agreement, under which the former should purchase at least 120/180/200 tons of plasma from the latter per year in the next three years. In 2015, Hebei Da'an Pharmaceutical and Guangdong Weilun actively planned to cooperate on the allocation of plasma fraction II + III, namely the former (it only produces human albumin now) should allocate partial plasma fraction II + III to Guangdong Weilun for the production of immunoglobulin products.

China Blood Product Industry Report, 2016-2019 focuses on the followings:

Market characteristics, operating environments, status quo, etc. of China blood product industry;

Supply and demand, competition pattern, import and export, development forecast, etc. of China blood product industry;

Supply and demand, competition pattern, etc. of 8 blood product segments, including human albumin, human immunoglobulin (pH4) for intravenous injection, blood coagulation factor and tetanus human immunoglobulin;

Operation, blood product business and prospects of 13 major Chinese blood product companies.

Contents

1. OVERVIEW OF BLOOD PRODUCT INDUSTRY

- 1.1 Definition
- 1.2 Classification
- 1.3 Recombinant Blood Products
- 1.4 Industry Chain
- 1.5 Features

2. OVERVIEW OF CHINA BLOOD PRODUCT INDUSTRY

- 2.1 Market Size
- 2.2 Status Quo
- 2.3 Supply and Demand
 - 2.3.1 Supply
 - 2.3.2 Demand
- 2.4 Competition
- 2.5 Operating Environment
 - 2.5.1 International
 - 2.5.2 Policy
 - 2.5.3 Domestic Biopharmaceutical Market
- 2.6 Import and Export

3. BLOOD PRODUCT MARKET SEGMENTS IN CHINA

- 3.1 Human Albumin
 - 3.1.1 Supply and Demand
 - 3.1.2 Competition Pattern
 - 3.1.3 Prospects
- 3.2 Human Immunoglobulin (pH4) for Intravenous Injection
 - 3.2.1 Supply and Demand
 - 3.2.2 Competition Pattern
- 3.3 Blood Coagulation Factor VIII
 - 3.3.1 Supply and Demand
 - 3.3.2 Competition Pattern
 - 3.3.3 Prospects
- 3.4 Hepatitis B Immunoglobulin
 - 3.4.1 Supply and Demand

- 3.4.2 Competition Pattern
- 3.5 Human Immunoglobulin
 - 3.5.1 Supply and Demand
 - 3.5.2 Competition Pattern
- 3.6 Human Prothrombin Complex
 - 3.6.1 Supply and Demand
 - 3.6.2 Competition Pattern
- 3.7 Tetanus Immunoglobulin
 - 3.7.1 Supply and Demand
 - 3.7.2 Competition Pattern
- 3.8 Human Rabies Immunoglobulin
 - 3.8.1 Supply and Demand
 - 3.8.2 Competition Pattern

4. MAJOR CHINESE MANUFACTURERS

- 4.1 China Biologic Products Inc. (NASDAQ: CBPO)
 - 4.1.1 Profile
 - 4.1.2 Operation
 - 4.1.3 Revenue Structure
 - 4.1.4 Customers and Suppliers
 - 4.1.5 R&D and Investment
 - 4.1.6 Shandong Taibang Biological Products Co., Ltd.
 - 4.1.7 Guizhou Taibang Biological Products Co., Ltd.
 - 4.1.8 Xi'an Huitian Blood Products Co., Ltd.
 - 4.1.9 Outlook and Prospects
- 4.2 Hualan Biological Engineering Inc. (002007.SZ)
 - 4.2.1 Profile
 - 4.2.2 Operation
 - 4.2.3 Revenue Structure
 - 4.2.4 Gross Margin
 - 4.2.5 Customers and Suppliers
 - 4.2.6 R&D and Investment
 - 4.2.7 Blood Products
 - 4.2.8 Outlook and Prospects
- 4.3 Shanghai RAAS Blood Products Co., Ltd. (002252.SZ)
 - 4.3.1 Profile
 - 4.3.2 Operation
 - 4.3.3 Revenue Structure

- 4.3.4 Gross Margin
- 4.3.5 Customers and Suppliers
- 4.3.6 R&D and Investment
- 4.3.7 Outlook and Prospects
- 4.4 Beijing Tiantan Biological Products Co., Ltd. (TIANTANBIO, 600161.SH)
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 Revenue Structure
 - 4.4.4 Customers and Suppliers
 - 4.4.5 Gross Margin
 - 4.4.6 R&D and Investment
 - 4.4.7 Blood Products (Chengdu Rongsheng Pharmaceutical Co., Ltd.)
 - 4.4.8 Outlook and Prospects
- 4.5 Zhenxing Biopharmaceutical and Chemical Co., Ltd. (000403.SZ)
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Revenue Structure
 - 4.5.4 Gross Margin
 - 4.5.5 Customers and Suppliers
 - 4.5.6 R&D and Investment
 - 4.5.7 Blood Products (Guangdong Shuanglin Bio-Pharmacy Co., Ltd.)
 - 4.5.8 Outlook and Prospects
- 4.6 Jiangxi Boya Bio-Pharmaceutical Co., Ltd. (300294.SZ)
 - 4.6.1 Profile
 - 4.6.2 Operation
 - 4.6.3 Revenue Structure
 - 4.6.4 Gross Margin
 - 4.6.5 Customers and Suppliers
 - 4.6.6 R&D and Investment
 - 4.6.7 Outlook and Prospects
- 4.7 Sichuan Yuanda Shuyang Pharmaceutical Co., Ltd.
 - 4.7.1 Profile
 - 4.7.2 Blood Products
- 4.8 Shanghai Institute of Biological Products Co., Ltd.
 - 4.8.1 Profile
 - 4.8.2 Blood Products
- 4.9 Shanxi Kangbao Biological Product Co., Ltd.
 - 4.9.1 Profile
 - 4.9.2 Blood Products

4.10 Green Cross

4.10.1 Profile

4.10.2 Blood Products

4.11 Humanwell Healthcare Group Co., Ltd. (600079.SH)

4.11.1 Profile

4.11.2 Operation

4.11.3 Blood Products (Wuhan Zhongyuan Ruide Biological Product Co., Ltd.)

4.12 Walvax Biotechnology Co, Ltd. (300142.SZ)

4.12.1 Profile

4.12.2 Operation

4.12.3 Blood Products (Hebei Da'an Pharmaceutical Co., Ltd. and Guangdong Weilun Biological Pharmaceutical Co., Ltd.)

4.13 Shenzhen Weiguang Biological Products Co., Ltd.

4.13.1 Profile

4.13.2 Operation

4.13.3 Revenue Structure

4.13.4 Gross Margin

4.13.5 Customers and Suppliers

4.13.6 R&D and Investment

4.13.7 Outlook and Prospects

5. SUMMARY AND FORECAST

5.1 Company Analysis

5.2 Growth Prediction

Selected Charts

SELECTED CHARTS

Basic Components of Blood
Plasma Protein Separation Procedure
Classification and Function of Blood Products
Comparison between Gene Recombinant Blood Products and Traditional Blood Products
Comparison between Domestic and Foreign Recombinant Blood Products in Types
Blood Product Industry Chain
Time Consumption of Plasma Collection and Separation Process
Comparison between Blood Product Enterprises and Chemical & Pharmaceutical Enterprises in Operating Costs and Expenses
Prices of Some Blood Products in China, 2014
Blood Product Market Size in China, 2003-2015
Lot Release Volume of Blood Products in China (by Product), 2009-2015
Blood Product Structure in China (by Lot Release Volume), 2009-2015
Per Capita Frequency of Plasma Donation and Plasma Collection in China vs. the Occident
Plasma Collections in China vs. USA
Production-use Plasma Volume in China, 2008-2015
Number of Plasma Collection Stations in China, 2008-2015
Geographical Distribution of Plasma Station Resources in China by the End of 2015
Mainstream Blood Products with Medical Insurance Coverage in China
Per Capita Consumption of Blood Products in China vs. Developed Countries
Plasma Station Distribution, Production-use Plasma Volume and Blood Product Revenue of Major Blood Product Enterprises in China, 2014
Plasma Station Distribution, Production-use Plasma Volume and Blood Product Revenue of Major Blood Product Enterprises in China, 2015
Comparison of Chinese Blood Product Manufacturing Enterprises in Product Line
Competition Pattern of Global Blood Product Enterprises, 2013
Product Structure of Global Blood Products
Blood Products Available in Overseas Market
Global Blood Product Manufacturers
Main Policies on Chinese Blood Products
Policies on Maximum Retail Price of Drugs in China, 2014-2015
Lot Release Volume of Imported Human Albumin in China, 2008-2015
Average Human Albumin Purchase Price of Sample Hospitals in China, 2005-2014

Proportion of Domestic and Imported Human Albumin in China (by Lot Release Volume), 2007-2015

Market Share of Major Human Albumin Manufacturers in China (by Lot Release Volume), 2008-2015

Consumption of Human Immunoglobulin (pH4) for Intravenous Injection per 1,000 Persons by Country, 2013 (g/1,000 persons)

Lot Release Volume and Growth Rate of Human Immunoglobulin (pH4) for Intravenous Injection in China, 2007-2015

Price of Human Immunoglobulin (pH4) for Intravenous Injection in China vs. Other Countries

Average Purchase Price of Human Immunoglobulin (pH4) for Intravenous Injection of Sample Hospitals in China, 2005-2014

Market Share of Major Manufacturers of Human Immunoglobulin (pH4) for Intravenous Injection in China (by Lot Release Volume), 2007-2015

Lot Release Volume and Growth Rate of Blood Coagulation Factor VIII in China, 2008-2015

Market Share of Major Human Blood Coagulation Factor VIII Manufacturers in China (by Lot Release Volume), 2008-2015

Comparison between Human Blood Coagulation Factor VIII and Recombinant Blood Coagulation Factor VIII

Per Capita Consumption of Recombinant VIII Factor and Plasma VIII Factor in Major Countries (IU/Person)

Lot Release Volume and Growth Rate of Hepatitis B Immunoglobulin in China, 2009-2015

Market Share of Major Hepatitis B Immunoglobulin Manufacturers in China (by Lot Release Volume), 2008-2015

Prices of Human Immunoglobulin in China by Dosage, 2014

Lot Release Volume and Growth Rate of Human Immunoglobulin in China, 2008-2015

Market Share of Major Human Immunoglobulin Manufacturers in China (by Lot Release Volume), 2008-2015

Lot Release Volume and Growth Rate of Human Prothrombin Complex in China, 2008-2015

Market Share of Major Human Prothrombin Complex Manufacturers in China (by Lot Release Volume), 2008-2015

Lot Release Volume and Growth Rate of Tetanus Immunoglobulin in China, 2008-2015

Market Share of Major Tetanus Immunoglobulin Manufacturers in China (by Lot Release Volume), 2008-2015

Rabies Incidents and Death Rate in China, 2008-2014

Lot Release Volume and Growth Rate of Human Rabies Immunoglobulin in China,

2008-2015

Market Share of Major Human Rabies Immunoglobulin Manufacturers in China (by Lot Release Volume), 2008-2015

Equity Structure of China Biologic Products by the End of 2014

Distribution of Blood Products Manufacturing Bases and Plasma Stations of CBPO, 2015

Revenue and Operating Income of CBPO, 2008-2015

Gross Margin of CBPO, 2011-2015

Revenue Breakdown of CBPO (by Product), 2011-2015

Revenue Structure of CBPO (by Product), 2010-2015

CBPO's Revenue from Top 5 Customers and % of Total Revenue, 2008-2014

R&D Costs and % of Total Revenue of CBPO, 2010-2015

Lot Release Volume of Blood Products of Shandong Taibang Biological Products, 2008-2015

Lot Release Volume of Blood Products of Guiyang Qianfeng Biological Products, 2008-2015

Lot Release Volume of Blood Products of Xi'an Huitian Blood Products, 2008-2014

Revenue and Operating Income of CBPO, 2014-2019E

Revenue and Operating Income of Hualan Biological Engineering Inc., 2008-2015

Revenue of Hualan Biological Engineering Inc. (by Sector), 2008-2015

Gross Margin of Hualan Biological Engineering Inc. (by Product), 2008-2015

Hualan Biological Engineering Inc.'s Revenue from Top 5 Customers and % of Total Revenue, 2007-2014

Hualan Biological Engineering Inc.'s Procurement from Top 5 Suppliers and % of Total Procurement, 2007-2014

Name List and Procurement Contribution of Hualan Biological Engineering Inc.'s Top 5 Suppliers, 2014

R&D Costs and % of Total Revenue of Hualan Biological Engineering Inc., 2008-2015

Types and Specifications of Blood Products of Hualan Biological Engineering Inc.

Distribution of Plasma Collection Stations of Hualan Biological Engineering Inc. by the End of 2015

Lot Release Volume of Blood Products of Hualan Biological Engineering Inc., 2008-2015

Revenue and Gross Margin of Blood Products of Hualan Biological Engineering Inc., 2008-2015

Revenue and Gross Margin of Blood Products of Hualan Biological Engineering Inc. (by Product), 2008-2015

Revenue and Operating Income of Hualan Biological Engineering Inc., 2014-2019E

Shanghai RAAS's Subsidiaries and Their Operation, H1 2015 (RMB mln)

Distribution of Plasma Stations of Shanghai RAAS by the End of 2015
Revenue and Operating Income of Shanghai RAAS, 2008-2015
Lot Release Volume of Blood Products of Shanghai RAAS, 2008-2015
Lot Release Volume of Blood Products of Tonrol Bio-Pharmaceutical, 2008-2015
Operating Revenue of Shanghai RAAS (by Product), 2008-2015
Revenue of Shanghai RAAS (by Region), 2008-2015
Gross Margin of Shanghai RAAS (by Product), 2008-2015
Shanghai RAAS's Revenue from Top 5 Customers and % of Total Revenue, 2008-2015
Shanghai RAAS's Procurement from Top 5 Suppliers and % of Total Procurement, 2007-2014
R&D Costs and % of Total Revenue of Shanghai RAAS, 2008-2015
Revenue and Operating Income of Shanghai RAAS, 2014-2019E
TIANTANBIO's Subsidiaries and Their Revenue and Income, H1 2015 (RMB mln)
Revenue and Operating Income of Tiantanbio, 2008-2015
Revenue of Tiantanbio (by Sector), 2008-2015
Revenue of Tiantanbio (by Region), 2008-2015
TIANTANBIO's Procurement from Top 5 Suppliers and % of Total Procurement, 2008-2014
TIANTANBIO's Revenue from Top 5 Customers and % of Total Revenue, 2008-2014
Gross Margin of Tiantanbio (by Sector), 2008-2015
R&D Costs and % of Total Revenue of Tiantanbio, 2009-2015
Distribution of Plasma Collection Stations of Tiantanbio by the End of 2015
Revenue and Gross Margin of Blood Products of Tiantanbio, 2008-2015
Lot Release Volume of Blood Products of RonSen and Tiantanbio, 2008-2015
Revenue and Operating Income of Tiantanbio, 2014-2019E
Revenue and Operating Income of Zhenxing Biopharmaceutical and Chemical, 2008-2015
Operating Revenue of Zhenxing Biopharmaceutical and Chemical (by Product), 2009-2015
Gross Margin of Zhenxing Biopharmaceutical and Chemical (by Product), 2009-2013
Zhenxing Biopharmaceutical and Chemical's Revenue from Top 5 Customers and % of Total Revenue, 2009-2014
Name List and Revenue Contribution of Zhenxing Biopharmaceutical and Chemical's Top 5 Customers, 2014
Zhenxing Biopharmaceutical and Chemical's Procurement from Top 5 Suppliers and % of Total Procurement, 2014
R&D Costs and % of Total Revenue of Zhenxing Biopharmaceutical and Chemical, 2009-2015

Production-use Plasma Volume of Shuanglin Bio-Pharmacy, 2010-2015

Distribution of Plasma Collection Stations of Shuanglin Bio-Pharmacy by the End of 2015

Lot Release Volume of Blood Products of Shuanglin Bio-Pharmacy, 2008-2015

Revenue and Gross Margin of Blood Products of Zhenxing Biopharmaceutical and Chemical, 2009-2015

Revenue and Operating Income of Zhenxing Biopharmaceutical and Chemical, 2014-2019E

Distribution of Single Plasma Collection Stations of Jiangxi Boya Bio-Pharmaceutical by the End of 2015

Plasma Collection Volume of Jiangxi Boya Bio-Pharmaceutical, 2008-2015

Revenue and Operating Income of Jiangxi Boya Bio-Pharmaceutical, 2008-2015

Revenue of Jiangxi Boya Bio-Pharmaceutical (by Product), 2009-2015

Lot Release Volume of Major Blood Products of Jiangxi Boya Bio-Pharmaceutical, 2011-2014

Operating Revenue of Jiangxi Boya Bio-Pharmaceutical (by Region), 2009-2014

Gross Margin of Jiangxi Boya Bio-Pharmaceutical (by Product), 2009-2015

Jiangxi Boya Bio-Pharmaceutical's Revenue from Top 5 Customers and % of Total Revenue, 2009-2015

Jiangxi Boya Bio-Pharmaceutical's Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2015

R&D Costs and % of Total Revenue of Jiangxi Boya Bio-Pharmaceutical, 2009-2015

Products under Research and Progress of Jiangxi Boya Bio-Pharmaceutical as of Oct. 2015

Revenue and Operating Income of Jiangxi Boya Bio-Pharmaceutical, 2014-2019E

Distribution of Plasma Stations of Sichuan Yuanda Shuyang Pharmaceutical by the End of 2015

Lot Release Volume of Blood Products of Sichuan Yuanda Shuyang Pharmaceutical, 2008-2015

Lot Release Volume of Blood Products of Shanghai Institute of Biological Products, 2008-2015

Distribution of Plasma Stations of Shanghai Institute of Biological Products by the End of 2015

Distribution of Plasma Stations of Shanxi Kangbao Biological Product by the End of 2015

Lot Release Volume of Blood Products of Shanxi Kangbao Biological Product, 2008-2015

Distribution of Plasma Stations of Green Cross China by the End of 2015

Lot Release Volume of Blood Products of Green Cross China, 2008-2015

Revenue and Operating Income of Humanwell Healthcare, 2009-2015

Lot Release Volume of Blood Products of Wuhan Zhongyuan Ruide Biological Product, 2008-2015

Production Industry Layout of Walvax Biotechnology

Revenue and Operating Income of Walvax Biotechnology, 2009-2015

Revenue of Walvax Biotechnology (by Product), 2009-2015

Distribution of Single Plasma Collection Stations of Shenzhen Weiguang Biological Products by the End of 2015

Plasma Collection Volume and Production-use Plasma Volume of Shenzhen Weiguang Biological Products, 2012-2015

Revenue and Operating Income of Shenzhen Weiguang Biological Products, 2012-2015

Capacity, Production and Sales Volume of Shenzhen Weiguang Biological Products (by Product), 2012-2015

Revenue Breakdown of Shenzhen Weiguang Biological Products (by Product), 2012-2015 (RMB mln)

Revenue Structure of Shenzhen Weiguang Biological Products (by Product), 2012-2015 (RMB mln)

Gross Margin of Shenzhen Weiguang Biological Products (by Product), 2012-2015

Name List and Revenue Contribution of Shenzhen Weiguang Biological Products' Top 5 Customers, 2012-2015

Name List and Procurement Contribution of Shenzhen Weiguang Biological Products' Top 5 Suppliers, 2012-2015

R&D Costs and % of Total Revenue of Shenzhen Weiguang Biological Products, 2012-2015

Some Products under Research and Progress of Shenzhen Weiguang Biological Products by the End of 2015

Fundraising Projects of Shenzhen Weiguang Biological Products

Revenue and Operating Income of Shenzhen Weiguang Biological Products, 2014-2019E

Number of Plasma Stations of Major Blood Product Enterprises in China as of Dec. 2015

Production-use Plasma Volume of Major Blood Product Enterprises in China, 2014-2015

Blood Product Revenue of Major Blood Product Enterprises in China, 2011-2015

Major M&A Events of Blood Product Industry in China, 2008-2015

Market Size of Blood Products in China, 2014-2019E

Gross Margin of Major Blood Product Enterprises in China, 2011-2015

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