

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.

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