

China Blood Products Industry Report, 2010-2011



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Recent years have seen fast-growing development of blood product industry in China, with the enterprises concerned numbering 33 which can produce 10-odd blood products including human albumin, human immunoglobulin (pH4) for intravenous injection and human immunoglobulin. In 2003-2010, the CAGR of blood products reached 20.3% in China, far above the global level in the same period.

Thanks to many favorable factors such as the advance of economy and technology, the acceleration of population growth and aging process as well as the people's further recognition of blood products, China's blood product market has seen buoyant momentum which is expected to maintain until 2015 and beyond.

However, the blood products of China have always seen short supply due to limited blood plasma source. Especially, since August 2011 when 16 plasma collection stations were closed in Guizhou Province, the production of China-based blood product enterprises has been further constrained.

Accounting for five of the 16 plasma collection stations closed in Guizhou, Hualan Biological Engineering is the biggest victim of the shutdown, but it still comes out top in terms of the number of blood plasma stations (numbering 13), followed by Shanghai RAAS Blood Products and Beijing Tiantan Biological Products Corporation.

The supply shortage of blood products coupled with strained blood plasma source of leading enterprises has propelled China's import of blood products, but, thus far, only human albumin and recombinant coagulation factor VIII are allowed to import from foreign countries.

Affected by the lower price of human albumin in foreign countries, China has long been increasing its import volume, with the proportion in 2010 reaching 48.4% (by lot release volume), up 7.2% year-on-year. In particular, Octapharma and Behring occupied the biggest chunk.

As for recombinant coagulation factor VIII, due to high price and policy restriction (it's only allowed to use when hemophilia patients suffer serious bleeding and human coagulation factor VIII is unavailable), only products made by Bayer are allowed to be imported in China. However, considering the scarcity of human coagulation factor VIII and the increasing demand for coagulation factor VIII, the demand for recombinant coagulation factor VIII will grow further in China.

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