

Research Report on China Blood Product Industry, 2011-2016

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Abstracts

Description

Blood products made by segregating and purifying all kinds of proteins in the blood plasma consists of albumin, immunoglobulin, thrombinogen and other products. China's enterprises mainly produce 9 kinds of products in the first three categories.

The high concentration rate of the global blood product market is embodied in the three companies of developed countries accounting for more than 80% of the global market. The current global blood market remains relatively stable, of which the emerging economy is the main motivation of growth.

By the end of 2015, there were 33 blood product manufacturing enterprises certified by the government in China, but in fact, only 20 of them were in production. Since 2012, mergers and acquisitions are common in China's blood product industry. For example, Jiangxi Boya Bio- Pharmaceutical Co., Ltd. acquired partial stock rights of Zhejiang Haikang Biologicals Co., Ltd. Beijing Tiantan Biological Products Co., Ltd. purchased Chengdu Rosen Pharmaceutical Co., Ltd. Watson Biological Company acquired Hebei Docan Pharmaceutical Co., Ltd. Shanghai RAAS Blood Products Co., Ltd. purchased Zhengzhou Banghe Pharmaceutical Co., Ltd. China National Biotec Group acquired Guiyang Qianfeng Biological Products Co., Ltd. and Xi'an Huitian Blood Products Co., Ltd. Humanwell Healthcare Group Co., Ltd. purchased Wuhan Rui De Biological Products Co., Ltd.

In 2015, 8,000 tons of blood plasma was needed to meet the demand of Chinese market, and the actual supply was only 5,000 tons. For example, the demand for blood products of about 1.4 billion population of China should be 12,000 tons calculated

according to per capita demand of the normal blood products of the World Health Organization, which is far more than the actual supply of China.

In China's blood product industry, the scale of the blood plasma has been the main bottleneck restricting the development of blood product industry. The quality and quantity of plasma stations are of vital importance.

In 2001, Chinese government announced that no new blood product manufacturing enterprises would be approved to ensure the safety of blood and its products, and block the spread of HIV through collection and supply of blood .

In 2008, Chinese government formulated the regulations that the plasma collection regions should guarantee the quantity of the plasma donors, which can satisfy no less than 30 tons' collection of source plasma.

In 2011, Guizhou government announced the program of adjusting the settings of blood services. The plasma collection stations decreased from 20 to 4, of which Hualan Biological Engineering Co., Ltd., the blood product giant, suffered the most. The plasma stations of Guizhou Province decreased from 6 to 1, having reduced half of the corporate source plasma supply.

Lack of the local blood products, but Chinese government has issued strict regulations on the import of blood products. Only human serum albumin and three kinds of thrombinogen are allowed to be imported.

In recent years, the competitiveness of China's blood product market has been mainly determined by the amount of blood plasma resources. Under the tense condition of source plasma supply, blood product manufacturing enterprises will obtain more space for survival and development with more blood plasma stations and source plasma.

On June 1, 2015, China National Development and Reform Commission released the highest price limit on blood products, and companies can name their own prices. In the first quarter of 2016, the price of fibrinogen and tetanus immunoglobulin in Chinese market increases by 80%- 130%, and the price of intravenous gammaglobulin increases by 10%- 20%. In addition to the relaxed price regulations, another support policy is to gradually release the auditing of plasma collection stations. At the beginning of 2013, Chinese government released the auditing standards for plasma collection stations. By the end of 2013, there had been no more than 160 plasma collection stations in China. There were more than 200 plasma collection stations at the end of 2015. In spite of the

most plasma collection stations, Shanghai RAAS Blood Products Co. Ltd. had possessed only 30 plasma collection stations in operation by the end of 2015.

In the long run, the competitiveness of blood product manufacturing enterprises mainly depends on the ability of research & development and sales. In a few years, the tense situation of China's raw blood plasma's supply will be eased. Only enterprises with strong ability of research & development and sales and a sound product line can win the competition.

There are only two channels for overseas blood product enterprise to enter Chinese market. One is to export products to China directly. The other one is to enter Chinese market indirectly through such means as equity acquisition.

The report is accomplished on the basis of deep market research. Through this report, the readers shall acquire the following information:

Current Situation of the Global Blood Product Industry

Development History and Current Situation of China's Blood Products

Government Policies of China's Blood Product Industry

Niche Products' Current Situation of China's Blood Product

Market Competition of China's Blood Product Industry

China's Major Blood Product Enterprises and Their Operation Status

Development Trend of China's Blood Product Industry

The Following Enterprises and People Are Recommended to Purchase This Report:

Blood Product Manufacturing Enterprises

Blood Product Regulatory Agency

Investors /Research Agencies Focusing on Blood Product Industry

Contents

1 INTRODUCTION OF BLOOD PRODUCTS

- 1.1 Definition
- 1.2 Characteristics
- 1.3 Classification
 - 1.3.1 Albumin
 - 1.3.2 Immune Globulin
 - 1.3.3 Coagulation Factors
 - 1.3.4 Other Categories
- 1.4 Industrial Policies on Blood Product
 - 1.4.1 Industrial Competent Departments
 - 1.4.2 Policies on Enterprise Establishment
 - 1.4.3 Policies on Raw Material Purchasing
 - 1.4.4 Policies on Blood Product Production
 - 1.4.5 Policies on Blood Product Circulation
- 1.5 Overview on China Blood Product Industry
 - 1.5.1 Regulatory Policies
 - 1.5.2 Blood Utilization Ratio
 - 1.5.3 Industry Characteristics

2 OVERVIEW OF GLOBAL BLOOD PRODUCT INDUSTRY, 2011-2015

- 2.1 Industry Overview
 - 2.1.1 Development Process
 - 2.1.2 Competition Pattern
 - 2.1.3 Supply Status
 - 2.1.4 Demand Status
- 2.2 Major Blood Product Manufacturers in the Globe (Except China)
 - 2.2.1 Baxter International
 - 2.2.2 CSL Behring
 - 2.2.3 Grifols SA

3 SUPPLY AND DEMAND STATUS OF CHINA BLOOD PRODUCT INDUSTRY, 2011-2015

- 3.1 Development Process
- 3.2 Barriers to Entry

- 3.2.1 Policy Barriers
- 3.2.2 Blood Source Barrier
- 3.2.3 Technology and Quality Control Capability
- 3.3 Supply
 - 3.3.1 Overview on Production Status
 - 3.3.2 Major Blood Product Manufacturers in China
 - 3.3.3 Production Capacity and Output Volume of Albumin
 - 3.3.4 Production Capacity and Output Volume of Immune Globulin
 - 3.3.5 Production Capacity and Output Volume of Coagulation Factor
- 3.4 Demand Status
 - 3.4.1 Albumin
 - 3.4.2 Immune Globulin
 - 3.4.3 Coagulation Factors

4 MAJOR ENTERPRISES OF CHINA BLOOD PRODUCT INDUSTRY, 2011- 2015

- 4.1 Shanghai RAAS Blood Products Co. Ltd.
 - 4.1.1 Enterprise Profile
 - 4.1.2 Production Capacity
- 4.2 Hualan Biological Engineering Co., Ltd.
- 4.3 Beijing Tiantan Biological Products Co., Ltd. (Subsidiary of China National Biotec Group Company Limited)
- 4.4 Guangdong Shuanglin Bio-pharmaceutical Co., Ltd.
- 4.5 Jiangxi Boya Bio-pharmaceutical Co., Ltd.
- 4.6 Hunan Nanyue Pharmaceutical Co., Ltd.
- 4.7 Wuhan Rui De Biological Products Co., Ltd.
- 4.8 Sichuan Yuanda Shuyang Pharmaceutical Co., Ltd.
- 4.9 Green Cross Biological Products Co., Ltd.
- 4.10 Guiyang Qianfeng Biological Products Co., Ltd.
- 4.11 Anhui Da'an Biological Products Co., Ltd.
- 4.12 Shenzhen Weiguang Biological Products Co., Ltd.
- 4.13 Shandong Taibang Products Co., Ltd.
- 4.14 Subordinate Institutions of Biological Products of China National Biotec Group

5 FORECAST ON DEVELOPMENT OF CHINA BLOOD PRODUCT INDUSTRY, 2016-2020

- 5.1 Supply Forecast
 - 5.1.1 Forecast on Plasma Volume

5.1.2 Forecast on Lot Release

5.1.3 Forecast on Production Capacity Expansion

5.2 Demand Forecast

5.2.1 Demand Trend Prediction

5.2.2 Prediction of Market Size

5.3 Forecast on Market Competition

5.3.1 Forecast on Popular Products

5.3.2 Forecast on Competition Pattern

Selected Charts

SELECTED CHARTS

Chart Common Varieties and Functions of Albumin
Chart Common Varieties and Functions of Immune Globulin
Chart Common Varieties and Functions of Coagulation Factors
Chart Varieties and Functions of Other Blood Products
Chart Important Policies of China Blood Product Industry
Chart Top 5 Blood Product Enterprises in the World, 2015
Chart Global Blood Product Plasma Volume and Forecast, 2009- 2020
Chart Global Blood Product Market Scale and Forecast, 2009-2020
Chart Market Share by Region in the Globe
Chart Market Share by Category in the Globe
Chart Sales Scale of Baxter International Blood Products, 2011-2015
Chart Sales Scale of CSL Behring Blood Products, 2011-2015
Chart Sales Scale of Grifols Blood Products, 2011-2015
Chart Blood Product Plasma Volume in China, 2009-2015
Chart Lot Release Volume of Blood Products in China, 2009-2015
Chart Major Blood Product Manufacturers in China
Chart Lot Release Volume of Albumin Products in China, 2009- 2015
Chart Lot Release Volume of Immune Globulin Products in China, 2009-2015
Chart Lot Release Volume of Coagulation Factor Products in China, 2009-2015
Chart Market Scale of China Blood Products, 2011-201528
Chart Market Scale of Albumin Blood Products in China, 2011-2015
Chart Market Scale of Immune Globulin Blood Products in China, 2011-2015
Chart Market Scale of Coagulation Factor Blood Products in China, 2011-2015
Chart Products of Shanghai RAAS Blood Products Co. Ltd.
Chart Plasma Volume of Shanghai RAAS Blood Products Co. Ltd., 2011-2015
Chart Plasma Collecting Stations Newly Approved by the Chinese after 2009
Chart Forecast on Plasma Volume in China, 2016-2020
Chart Forecast on Lot Release of China Blood Products, 2016-2020
Chart Comparison of Annual Blood Product Consumption Per Capita Between Developed Countries and China, 2015
Chart Forecast on the Market Scale of Blood Products in China, 2016-2020
Chart Forecast on the Market Scale of Albumin Products in China, 2016-2020
Chart Forecast on the Market Scale of Immune Globulin Products in China, 2016- 2020
Chart Forecast on the Market Scale of Coagulation Factor Products in China, 2016-2020

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