

Research Report on Global and China Blood Product Industry, 2013-2017

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Abstracts

Blood products are made by separating and extracting various proteins in plasma and classified into albumin products, immune globulin products, coagulation factor products and other blood products. China enterprises mainly produce nine kinds of products of the first three categories.

The concentration rate of global blood products is very high and the 5 enterprises of developed countries occupy 80-85% of the market. The global plasma volume in 2012 exceeded 30,000 tons and the market scale reached USD 17.5 billion, increasing by 7.4% YOY. The current global blood product market remains relatively stable, mainly driven by emerging economies.

There are strict regulations and high barriers to entry in China blood product industry. No new blood product manufacturing enterprises are allowed to be further established and the import of most blood product varieties is limited. By July 2013, there are only about 20 blood product manufacturers with normal production in China, with small annual plasma volumes and a low market concentration rate.

In 2012, China blood product enterprises realized a total plasma volume of 3,300 tons which decreased compared with that in 2011. The major reason was that the plasma-collecting volume of Guizhou Province accounted for nearly 30% of the total volume in China and the shut-down of many plasma stations in the province led to the drop of plasma volume in 2012.

As new plasma stations have been gradually put into operation since 2011, the plasma volume is expected to recover in 2013 and gradually reach 3,520 tons in 2011. The plasma volume will start to grow from 2014. In 2012, the market scale of China blood

products was CNY 14 billion, increasing by approximately 25% YOY, mainly owing to the rise of product unit price caused by short supply. As the output volume of China blood products falls far behind domestic demand, there is no fierce competition in the market. Most products are sold at prices higher than that in the international market.

Market research by CRI has shown that the supply of blood products in China is tight and manufacturers usually have no blood products in stock. Products are usually pre-ordered. Due to the low production capacity utilization rate, most blood product enterprises in China have not planned expansion in recent years. In addition, due to the short supply, the actual prices of blood products in China market are much higher than the government's ceiling prices, so blood product enterprises can obtain high profits.

In early 2012, the Ministry of Health put forward the plan of “doubling” China blood products during the “Twelfth-Five Year” (2011-2015). The future competent authorities are expected to make adjustments and alleviate the short supply of blood products by establishing and restoring plasma stations or increasing plasma donation frequency. CRI predicts that Chinese government will loosen the approval for plasma stations in the future, so the plasma volume, lot release and market scale will continue to increase. The increased products will be consumed by the great demand. As a result, the market competition will not be very fierce.

In a short term, the competitiveness of blood product enterprises will be determined by their quantities of plasma in recent years. As raw plasma is in continued tight supply currently, blood product manufacturers with more plasma stations to collect raw plasma will have more room for survival and development.

In a long term, the competitiveness of blood product enterprises depends on R & D and marketing capabilities. After the tight supply of raw plasma is alleviated in 3-5 years later, enterprises with strong R & D, sales ability and complete product lines will win the competition.

Currently, China blood product industry is entering a period of rapid integration. On November 26, 2012, Jiangxi Boya Bio-pharmaceutical Co., Ltd. and other companies acquired a 68% share of Zhejiang Haikang Biologicals Co., Ltd. with CNY 115.6 million. On June 13, 2013, Jiangxi Boya Bio-pharmaceutical Co., Ltd. successively transferred 32% of its shares of Zhejiang Haikang Biologicals Co., Ltd. at the price of CNY 36.4377 million. Zhejiang Haikang Biologicals Co., Ltd. is the only enterprise that built and owns plasma stations approved by the government. In June 2013, Watson Biological Company declared the acquisition of a 35% share of Wuhan Docan Pharmaceutical

Co., Ltd. held by Ruijuquan Medical Technology Consulting Co., Ltd. with CNY 337 million. After the acquisition, Watson Biological Company will possess a 90% share of Wuhan Docan Pharmaceutical Co., Ltd. which is the only blood product enterprise with plasma stations in Hebei and a plasma-collecting capacity of 100 tons/year.

As Chinese government no longer issues new licenses for blood product manufacturers, the new GMP certification requires significant capital investment and plasma station approval leans towards large enterprises, the development of small blood product enterprises is limited. The only way for small enterprises to survive is to join large enterprises.

Foreign blood product enterprises that plan to enter China market only have two choices currently: directly exporting products to China or indirectly entering China market by share acquisition, etc.

This Report Was Completed Based on In-depth Market Research. Readers Can Obtain the Following Information or More Through This Report:

Status of Global Blood Product Industry

Status of China Blood Product Industry and Products

Economy and Policy Environment that China Blood Product Industry Faces

Status of Segmented Blood Products in China

Market Competition Status of China Blood Product Industry

Operation Status of Major Blood Product Manufacturers in China

Development Trend of Blood Product Industry

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

Blood Product Manufacturers

Blood Product Trading Enterprises

Agencies Supervising and Regulating Blood Products

Investors/Research Institutions Concerned About Blood Product Industry

Contents

CHAPTER 1 INTRODUCTION OF BLOOD PRODUCTS

- 1.1 Definition
- 1.2 Classification
 - 1.2.1 Albumin
 - 1.2.2 Immune Globulin
 - 1.2.3 Coagulation Factors
 - 1.2.4 Other Categories
- 1.3 Characteristics of Blood Products

CHAPTER 2 OVERVIEW ON GLOBAL BLOOD PRODUCT INDUSTRY, 2008-2012

- 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
 - 2.2.1 Baxter International
 - 2.2.2 CSL Behring
 - 2.2.3 Grifols SA

CHAPTER 3 DEVELOPMENT ENVIRONMENT OF CHINA BLOOD PRODUCT INDUSTRY, 2008-2013

- 3.1 Economic Environment
- 3.2 Policy Environment
 - 3.2.1 Competent Government Authorities
 - 3.2.2 Policies on Enterprise Establishment
 - 3.2.3 Policies on Raw Material Purchasing
 - 3.2.4 Policies on Blood Product Production
 - 3.2.5 Policies on Blood Product Circulation
- 3.3 Development Process
- 3.4 Barriers to Entry
 - 3.4.1 Policy Barriers
 - 3.4.2 Blood Source
 - 3.4.3 Technology and Quality Control Capability

CHAPTER 4 OPERATION STATUS OF CHINA BLOOD PRODUCT INDUSTRY, 2008-2012

4.1 Overview

4.1.1 Industry Status

4.1.2 Industry Characteristics

4.2 Supply

4.2.1 Production Status

4.2.2 China Blood Product Manufacturers

4.2.3 Production Capacity and Output Volume of Albumin

4.2.4 Production Capacity and Output Volume of Immune Globulin

4.2.5 Production Capacity and Output Volume of Coagulation Factors

4.3 Demand Status

4.3.1 Analysis on Demand Status of Albumin

4.3.2 Analysis on Demand Status of Immune Globulin

4.3.3 Analysis on Demand Status of Coagulation Factors

CHAPTER 5 TOP 5 ENTERPRISES OF CHINA BLOOD PRODUCT INDUSTRY, 2010-2012

5.1 China National Biotec Group

5.2 Hualan Biological Engineering Co., Ltd.

5.3 Beijing Tiantan Biological Products Co., Ltd.

5.4 Shanghai RAAS Blood Products Co. Ltd.

5.5 Sichuan Yuanda Shuyang Pharmaceutical Co., Ltd.

CHAPTER 6 PROSPECT OF CHINA BLOOD PRODUCT INDUSTRY

6.1 Forecast on Supply

6.1.1 Forecast on Plasma Volume

6.1.2 Forecast on Lot Release

6.1.3 Forecast on Production Capacity Expansion

6.2 Forecast on Demand

6.2.1 Demand Trend

6.2.2 Forecast on the Overall Market Scale

6.2.3 Forecast on Segmented Market Scale

6.3 Industry Prospect

6.3.1 Forecast on Popular Products

6.3.2 Forecast on Competition Pattern

6.3.3 Mergers and Acquisitions

Selected Charts

SELECTED CHARTS

Chart Common Varieties and Functions of Coagulation Factors
Chart Varieties and Functions of Other Blood Products
Chart Top 5 Blood Product Enterprises in the World, 2011-2012
Chart Global Blood Product Plasma Volume and Forecast, 2008-2017
Chart Global Blood Product Market Scale and Forecast, 2008-2017
Chart Sales Scale of Grifols SA's Blood Products, 2010-2012
Chart Important Policies of China Blood Product Industry Since 1985 and Influence
Chart Major Blood Product Manufacturers in China, 2012-2013
Chart Lot Release Volume of Albumin Products in China, 2008-2012
Chart Lot Release Volume of Immune Globulin Products in China, 2008-2012
Chart Lot Release Volume of Coagulation Factor Products in China, 2008-2012
Chart Market Scale of China Blood Products, 2008-2012
Chart Market Structure of China Blood Products, 2012
Chart Major Products of China National Biotec Group
Chart Plasma Volume of China National Biotec Group, 2009-2012
Chart Major Products of Hualan Biological Engineering Co., Ltd.
Chart Major Products of Beijing Tiantan Biological Products Co., Ltd.
Chart Plasma Volume of Beijing Tiantan Biological Products Co., Ltd., 2009-2012
Chart Plasma-Collecting Stations Newly Approved by the Chinese Government, 2009-2013
Chart Forecast on Plasma Volume in China, 2013-2017
Chart Forecast on Lot Release of China Blood Products, 2013-2017
Chart Comparison of Annual Blood Product Consumption Per Capita Between Developed Countries and China, 2012
Chart Forecast on the Market Scale of Blood Products in China, 2013-2017
Chart Forecast on the Market Scale of Albumin Products in China, 2013-2017
Chart Forecast on the Market Scale of Immune Globulin Products in China, 2013-2017
Chart Forecast on the Market Scale of Coagulation Factor Products in China, 2013-2017

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