

Research Report on China's Blood Product Industry, 2012

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Abstracts

Blood products are made through separating and purifying various proteins in plasmas and they are mainly composed of four categories, the albumin, immunoglobulin, blood coagulation factors and other minorities. Chinese enterprises mainly produce nine kinds of products in the first three categories.

The market concentration of global blood products is very high. Blood products of five enterprises in developed countries totally account for 80% to 85% of the market share. In 2011, the global plasma input volume was 32,799 tons and the market scale reached USD 16.3 billion, with an increase of 9.2% YOY. At present, the global blood market relatively keeps steady and emerging economies are the main growing force.

The supervision on China's blood product industry is very strict; the barriers to entry are high and the import of the majority of blood products is restricted. By May, 2012, there were 23 regular blood product manufacturers in China; the plasma input volumes were not big and the market concentration was low. In 2011, the plasma input volume of China's blood product enterprises was 3,620 tons in total, with an increase of 10.3% over 2010; the market scale was CNY 11.2 billion, with a rapid increase of 22.17% YOY. Because the output of Chinese blood products is far less than the domestic demand, the competition is not intensive.

According to the market research by CRI, Chinese blood products are in short supply currently. Manufacturers are generally without stocks and products are always ordered in advance. Due to the low utilization of production capacity, the majority of Chinese blood products enterprises all have no productivity expansion plans recently. In addition, because the demand exceeds the supply, the actual price of blood products in Chinese market is possibly far higher than the maximum limit price set by the government.

Therefore, the margin of the industry is very high.

It is expected that the Chinese government's examination and approval for plasma stations will be loosened in the future. Therefore, the market scale, plasma input volume and authorized volume will constantly increase. Moreover, the output increase will be digested by the powerful future demand. Consequently, the market competition in the future years is not fierce either.

In the short term, the competitiveness of enterprises on China's blood product market is mainly determined by the ownership number of plasma resources in recent years. Currently, under the situation that the source plasma is constantly in short supply, owning more plasma stations and source plasmas can bring blood product manufacturers more survival and development space.

In the long term, the competitiveness of blood product enterprises is mainly presented in the R&D and sales ability. In three to five years, when the short supply of Chinese source plasmas is relieved, enterprises with strong R&D and sales abilities as well as perfect product lines can be victorious in the competition.

Currently, overseas blood product enterprises can enter Chinese market with two methods: firstly, they can directly export products to China; secondly, they can indirectly enter Chinese market by stock acquisition and so on.

The report is composed on the basis of an in-depth market research by China Research and Intelligence. More following information can be acquired through this report:

Current Situation of Global Blood Product Industry

Development Course and Current Situation of China's Blood Product Industry

Government Policies Faced by Chinese Blood Product Industry

Current Situation of Subdivision Products of China's Blood Products

Market Competition of China's Blood Product Industry

China's Major Blood Products Enterprises and the Operations

Development Trend of Blood Products Industry

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