

# Research Report on Global and China's Blood Products Industry, 2011-2012

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## Abstracts

The blood products Industry is a new industry originating and developing from the transfusion medicine, falling into the notional category of biological products. Blood products are the plasma protein or factor condensates extracted from the blood, which exert an irreplaceable prevention role in many diseases. Currently, no suitable artificial alternative has yet been found.

In 2009, the scale of global blood products market was around USD 13.40 billion, increasing by 16.7% over 2007. Such giants as CSL Behring, Talecris Biotherapeutics, Inc., Grifols, SA, Baxter International Inc., Octapharma AG have occupied the major market share. The market concentration of global blood products industry is presenting an increasing trend.

In 2009, the scale of China's blood products market reached about CNY 7 billion (USD 1.04 billion), increasing by over 10% YOY. Shanghai RAAS Blood Products Co., Ltd., Hualan Biological Engineering Inc., Tiantan Biological Products Co., Ltd. are the leading enterprises in the industry. Local enterprises in China are basically of small scale and hindered by capital, technology, raw materials, etc. In China, the factors influencing the development of blood products enterprises are mainly reflected in terms of plasma investment volume and product line. The plasma investment volume of blood product enterprises not only involves scale effect, but also reflects the enterprise's control over plasma resource; the product line represents the technological capability of a blood product enterprise. Meanwhile, owning more products signifies the cost reduction of a single product. Since the Chinese government strengthened the management of the plasma stations in 2004, the raw materials of China's blood products have been in short supply, the demand for blood products has exceeded supply, and the prices have been continuously rising, promoting the entire industry into the era of high gross

margins. In 2009-2010, the gross margins for China's blood products enterprises are between 20-75%.

The concentration of China's blood products industry is relatively lower than the international standard. The annual plasma investment volume of domestic first-line enterprises is generally 300-500 tons, lagging far behind foreign blood products giants with the threshold of 1,200 tons. There is still large room for M&A among enterprises.

Currently, China's blood products enterprises can be divided into 3 categories by scale and product class, among which the first category includes the large enterprises represented by Hualan Biological Engineering Inc., Shanghai RAAS Blood Products Co., Ltd., Tiantan Biological Products Co., Ltd., etc.; the second category mainly includes the enterprises possessing 4-10 plasma stations with relatively single product line as well as the monopolistic advantage of plasma resources in their regions; the third category includes the enterprises without strengths in terms of product line and plasma station. Since the Chinese Ministry of Health stipulated that small and medium-sized enterprises with below 6 product categories were not permitted to establish plasma stations, it can be expected that enterprises of the first category will continue expanding by virtue of their own strengths and resources superiority acquired from the capital market. However, due to the monopoly of a plasma station in a region (It is not permitted to establish 2 or more plasma stations, or conduct cross-regional plasma collection), at present, the underdeveloped regions in central and west China available for new plasma stations are becoming less, so that the second or third line enterprises with single product structure as well as plasma stations will be the focus of acquisition, while the other third line enterprises with no strengths of varieties or plasma stations will gradually be eliminated.

China's market demand for blood products has not been well met. It is estimated that the number of Chinese hemophiliacs reaches 80,000-100,000, 4 / 5 of which are lack of factor ?. For a long time, there have been only less than 10% of patients receiving regular treatment of hemophilia in China.

Such international blood products giants as CSL Behring and Baxter International Inc., have made overall layout in China, and presented a good momentum of development.

With the development of China's blood products industry and the gradual increase of industry concentration, the competition among blood products manufacturers is more importantly reflected in comprehensive strength, such as R&D capabilities of new products, promotional marketing capabilities, product quality and safety, control of blood

product materials, etc. The M&A of the industry is also ongoing.

Relative to overseas blood products enterprises, there is a huge market opportunity for China's blood products industry. On the one hand, they can make a handsome profit by exporting blood products to China; on the other hand, they can seek the opportunities of M&A in China's blood products industry, and directly establish production bases in China.

An in-depth research of China's blood products industry and interviews with blood products enterprises, distributors and related research institutions were carried out before the report was written.

Following and more information can be acquired from this report:

Overview of the global blood products industry

Overview of the development of China's blood products industry

Main Products of China's blood products industry

Analysis on plasma collection of China's blood products industry

Analysis on policies of China's blood products industry

Analysis on market demand for China's blood products industry

Analysis on major enterprises in China's blood products industry

The layout of international blood products giants in Chinese market

Influencing factors in the development of China's blood products industry

Analysis on the influence of the international financial crisis on China's blood products industry

M&A of China's blood products industry

Forecast on investment opportunities in China's blood products industry

## Forecast on the development of China's blood products industry

Following persons are advised to buy this report:

Blood products manufacturers

Blood products distributing business

Medical institutions

Investors concerned about the blood products industry

Research institutions concerned about the blood products industry

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