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Research Report on Global and Chinese Blood Product Industry, 2009

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Abstracts

The blood product industry is stemmed and developed from the blood transfusion, belonging to the conceptual category of biological products. The blood products, extracted the plasma proteins and factor concentrates from the blood, are the precious human biological products with irreplaceable prevention functions to many diseases. So far, there is no qualified man-made substitute.

In 2008, the market scale of global blood products were 12 billion USD, up by about 10% of 2007. The giants, CSL Behring, Talecris Biotherapeutics Inc, Grifols, S.A., Baxter International Inc, Octapharma AG and etc, occupied the major market shares. The market concentration of the global blood product industry was improved. After the merger of Bayer by Talecris Biotherapeutics Inc, CSL Behring merged Talecris Biotherapeutics Inc with 3.1 billion USD.

In 2008, the market scale of Chinese blood products was less than 1 billion USD. Shanghai RAAS Blood Products Co., Ltd, Hualan Biological Engineering Inc and Beijing Tiantan Biological Products Co., Ltd were the leaders of Chinese blood product industry. The scales of Chinese domestic blood product enterprises were all very small. The major factors affecting the development of the enterprises were capitals, technologies and materials and so on. The competitiveness of Chinese blood product enterprises mainly showed in the plasma volumes in operation, production lines and brand construction. The plasma volumes in operation not only represented the scale effect but also reflected the enterprises` control abilities of the blood resources; the production lines represented not only the technological levels of the blood product enterprises but also means single product costs undertook by more products. The brand construction represented that the price would not be the only standard to determine the sales volumes because of the special safety requirements of the blood products. The

famous enterprises could get comparatively high gross profit rate in the process of competition. In 2008, the gross profits of Chinese blood products were between 20 to 60 percent.

In 2008, the yields of Chinese blood products were decreased compared with last year. However, because of the growth in the average sale price of Chinese blood products, the total sales revenues were increased compared with last year.

The major reason for the yield decline of Chinese blood products is the bottleneck in the raw materials, the policy elements leading to the insufficient collections of the Source Plasma. Out of the consideration for the safety, Chinese government lists injection, biological products and special medicines as the high risky supervised products, blood products and vaccines as the key highly risky products. Since 1st July, 2008, Chinese government carried out the inspection period systems to the source plasma before the production of blood products, that is to lay aside the collected qualified source plasma for 90 days, then make a serological and virology inspection of the donator's plasma sample, if qualified, the source plasma could be used into the production of blood products. This measure strengthened the safety of the blood products, but leading to the reduction in the plasma collections.

The blood products can not meet the demands in Chinese market. It is estimated that the homophile numbers in China are about 80 to 100 thousand, four fifths of which are short of ? factor and only less than 10% of which are received the formal treatments.

Out of consideration for the prevention of blood diseases, such as AIDS, Chinese government limited the imports of blood products abroad from 1986. According to the present situation of the demands of the blood products exceeding the supplies and the pursuit of the blood products, the limitations for the blood products will loosen. In May of 2008, Chinese government announced that the import temporary tariff was adjusted from 3% to zone from 1st June, 2008 to 3rd December, 2008, including antiserum, human vaccines, culture organism and the similarities of the blood albumin and human vaccines.

The international blood product giants, such as CSL Behring and Baxter International Inc. have already distributed in China and developed fast.

With the development of Chinese blood product industry, the concentration of Chinese blood product industry is also improved. The competitions among the blood product enterprises are mainly the comprehensive strength competitions, such as the researches on the new products, the marketing promotions, the quality and safety of the products and the control ability of the blood raw materials. Meanwhile, the mergers and acquisitions among the enterprises went on all the time. In 2008, Beijing Tiantan Biological Products Co., Ltd had become the largest enterprises of blood products by merging Chengdu Rongsheng Biological Products Co., Ltd

As far as the oversea blood product enterprises are concerned, there exists huge market potential in Chinese blood product industry. On the one hand, they can obtain rich profits by exporting blood products to China. On the other hand, they can set up production bases in China by finding out the merger and acquisition opportunities among Chinese blood product enterprises.

The author wrote this report by the interviews of the patients and enterprises and the profound investigation into Chinese blood product industry.

More following information can be obtained in this report:
- Overview of Global Blood Product Industry
- Scales of Chinese Blood Product Industry
- Development of the Major Products in Chinese Blood Product Industry
- Collections of Chinese Blood Product Industry
- Policies of Chinese Blood Product Industry
- Demands of Chinese Blood Product Industry
- Major Enterprises of Chinese Blood Product Industry
- Chinese Blood Product Industry
- Distributions of International Blood Product Giants in Chinese Market
- Favorable and Unfavorable Factors Affecting the Development of Chinese Blood Product Industry
- Influences of International Financial Crisis on Chinese Blood Product Industry

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