

**China Vacuum Blood Collection Industry
Report, 2014-2017**

Mar. 2015

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.








Abstract

The vacuum blood collection system consisting of vacuum blood collection tubes, disposable blood collection needles, tourniquets, etc transfers human venous blood to closed containers and makes it into specimens prior to blood analysis.

As a key integral part of the vacuum blood collection system, vacuum blood collection tubes get chiefly used for collection and preservation of blood specimens. In 2009-2013, the consumption of vacuum blood collection tubes in China presented a CAGR of 22.1%, and the figure in 2014 was estimated to reach 4.702 billion pcs, with the per capita use of 3.44 pcs/a.

Given the huge potentials of Chinese vacuum blood collection market, foreign giants represented by BD, Terumo and Sekisui Chemical have set up sole proprietorships or joint ventures in China, and occupied the high-end market in the country. At present, foreign brands account for only about 30% of the sales volume, but share up to 60% of the revenue.

Main Enterprises of China Vacuum Blood Collection Industry and Their Vacuum Blood Collection Business

Corporate Logo	Headquarters Address	Introduction to Vacuum Blood Collection Business
	Guangzhou	IMPROVE MEDICAL as the industry leader can produce 500 million vacuum blood collection tubes and 200 million blood taking needles, with annual sales accounting for roughly 10% of the industry's market share.
	Shanghai	KHB started vacuum blood collection tube expansion project in April 2013 after which the production lines increased to 11 and annual capacity would reach 500 million. It has not yet disclosed whether the project is put into production.
	Chengdu	C.D.RICH has vacuum blood collection tube capacity of 400 million/year. In 2013 its vacuum blood collection system business recorded revenue of RMB68.31 million, a yr-on-yr increase of 21.3%.
	Liuyang	Hunan Liuyang Medical Instrument Factory, a key subsidiary of Hunan Sanli Industry, can produce over 300 million vacuum blood collection tubes each year.
	Weihai	HONGYU MEDICAL is one of the largest producers of blood collection tubes in China, capable of making 500 million vacuum blood collection tube products per year.
	Changsha	CHINASUN in 2012 announced RMB154 million investment in the construction of 10 production lines consisting of 800 million/a disposable sterile vacuum blood collection tube and 800 million/a blood taking needle to enter vacuum blood collection industry. It has not yet disclosed whether the project is put into production.
	Danyang	In 2012, Yuyue Medical increased RMB80 million capital into Suzhou Yuyue for productivity construction of vacuum blood collection tube and air purifier. In 2013, it embarked on vacuum blood collection tube research and development. The products are not available at the moment.

Source: China Vacuum Blood Collection Industry Report, 2014-2017 by ResearchInChina

Among local Chinese companies -- Improve Medical, Kehua Bio-engineering, Weigao, Rich Science Industry, Liuyang Medical Instrument Factory, Gongdong Medical, etc., Improve Medical is the leader with higher annual capacity, namely 500 million blood collection tubes and 200 million blood collection needles. In 2014, Improve Medical achieved the revenue of RMB232 million from vacuum blood collection system with the sales volume of 496 million pcs.

Lured by the promising vacuum blood collection industry, Yuyue Medical, China Sun Pharmaceutical Machinery and other medical device manufacturers have tapped into the industry.

In 2012, Yuyue Medical invested additional RMB80 million in Suzhou Yuyue Medical for the capacity construction of vacuum blood collection tubes and Air purifiers. In 2013, it embarked on the R & D of vacuum blood collection tubes. In October 2012, China Sun Pharmaceutical Machinery pledged to lavish RMB154.3 million in building 10 production lines of vacuum blood collection tubes and blood collection needles; upon completion, it will be capable of producing 400 million germ-free glass vacuum blood collection tubes, 400 million sterile plastic vacuum blood collection tubes and 800 million blood collection needles annually.

The report covers the following aspects:

- Overview of the global vacuum blood collection industry, involving development course, status quo, etc;
- Overview of China vacuum blood collection industry, embracing status quo, relevant policies, barriers to entry, competition pattern, import and export, etc.;
- Operation and vacuum blood collection system business of 12 Chinese companies and three foreign peers;
- Forecast for China vacuum blood collection industry and operation comparison between main players.

1 Overview

- 1.1 Definition
- 1.2 Classification

2 Overview of Global Vacuum Blood Collection Industry

- 2.1 Development Course
- 2.2 Status Quo

3 Overview of China Vacuum Blood Collection Industry

- 3.1 Status Quo
- 3.2 Relevant Policies
- 3.3 Barriers to Entry
- 3.4 Competition Pattern
- 3.5 Import and Export
 - 3.5.1 Import
 - 3.5.2 Export

4 Major Chinese Enterprises

- 4.1 Guangzhou Improve Medical Instruments
 - 4.1.1 Profile
 - 4.1.2 Operation
 - 4.1.3 Revenue Structure
 - 4.1.4 Gross Margin
 - 4.1.5 Vacuum Blood Collection System Business

- 4.1.6 R & D
- 4.1.7 Anticipation and Prospect
- 4.2 Shanghai Kehua Bio-Engineering
 - 4.2.1 Profile
 - 4.2.2 Operation
 - 4.2.3 Revenue Structure
 - 4.2.4 Gross Margin
 - 4.2.5 Vacuum Blood Collection System Business
 - 4.2.6 R & D
 - 4.2.7 Anticipation and Prospect
- 4.3 Shandong Weigao Group Medical Polymer
 - 4.3.1 Profile
 - 4.3.2 Operation
 - 4.3.3 Revenue Structure
 - 4.3.4 Gross Margin
 - 4.3.5 Vacuum Blood Collection System Business
 - 4.3.6 R & D
 - 4.3.7 Customers
 - 4.3.8 Anticipation and Prospect
- 4.4 Chengdu Rich Science Industry
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 Revenue Structure
 - 4.4.4 Gross Margin
 - 4.4.5 R & D
 - 4.4.6 Vacuum Blood Collection System Business
 - 4.4.7 Marketing and Procurement

- 4.4.8 Anticipation and Prospect
- 4.5 HunanLiuyang Medical Instrument Factory
 - 4.5.1 Profile
 - 4.5.2 Vacuum Blood Collection System Business
- 4.6 Sekisui Medical Technology (China) Co., Ltd.
 - 4.6.1 Profile
 - 4.6.2 Vacuum Blood Collection System Business
- 4.7 Shanghai Kindly Enterprise Development Group
 - 4.7.1 Profile
 - 4.7.2 Vacuum Blood Collection System Business
- 4.8 WeihaiHongyu Medical Devices
 - 4.8.1 Profile
 - 4.8.2 Vacuum Blood Collection System Business
- 4.9 HunanChina Sun Pharmaceutical Machinery
 - 4.9.1 Profile
 - 4.9.2 Operation
 - 4.9.3 Revenue Structure
 - 4.9.4 Gross Margin
 - 4.9.5 Vacuum Blood Collection System Business
 - 4.9.6 R & D
 - 4.9.7 Anticipation and Prospect
- 4.10 Jiangsu Yuyue Medical Equipment & Supply
 - 4.10.1 Profile
 - 4.10.2 Operation
 - 4.10.3 Revenue Structure
 - 4.10.4 Gross Margin
 - 4.10.5 R & D

4.10.6 Vacuum Blood Collection System Business

4.10.7 Anticipation and Prospect

4.11 Other Enterprises

4.11.1 Tianjin Hanaco Medical

4.11.2 Zhejiang Gongdong Medical Technology

5 Major Foreign Enterprises

5.1 BD (Becton, Dickinson and Company)

5.1.1 Profile

5.1.2 Operation

5.1.3 Revenue Structure

5.1.4 Gross Margin

5.1.5 Development in China

5.1.6 Vacuum Blood Collection System Business

5.2 Terumo

5.2.1 Profile

5.2.2 Operation

5.2.3 Revenue Structure

5.2.4 R & D

5.2.5 Development in China

5.2.6 Vacuum Blood Collection System

5.3 Nipro

5.3.1 Profile

5.3.2 Operation

5.3.3 Revenue Structure

5.3.4 Vacuum Blood Collection System Business

5.3.5 Development in China

6 Prediction and Outlook

6.1 Forecast for China Vacuum Blood Collection Industry

6.1.1 Growth of Medical and Health Care Costs

6.1.2 Increase of Patient Number

6.1.3 Raised per Capita Income

6.1.4 Population Growth, Aging of Population

6.1.5 Further Improved Medical Insurance System

6.2 Operation Comparison between Main Enterprises

6.2.1 Revenue

6.2.2 Net Income

6.2.3 Gross Margin

6.2.4 Vacuum Blood Collection System Business

- Classification and Applications of Vacuum Blood Collection Tubes
- Classification of Vacuum Blood Collection Tubes (by Cranial Color)
- Development Characteristics of Vacuum Blood Collection System by Generation
- Performance of Vacuum Blood Collection System by Generation
- Consumption of Vacuum Blood Collection Tube in the World, 2005-2014
- Consumption of Vacuum Blood Collection Tube in China, 2009-2014
- Gap between Chinese and Foreign Enterprises in Vacuum Blood Collection Tube
- Policies about China Medical Device Industry, 2007-2014
- China's Vacuum Blood Collection System Market Pattern
- Sales Volume Structure of China Vacuum Blood Collection Industry (by Region), 2014
- Revenue Structure of China Vacuum Blood Collection Industry (by Region), 2014
- Capacity of Major Enterprises in China Vacuum Blood Collection Industry, 2014
- Layout of Major Enterprises in China Vacuum Blood Collection Industry
- Import Volume and Value of Other Needles, Catheters, Cannulas and Similar Supplies in China, 2012-2014
- Top 10 Import Sources of Other Needles, Catheters, Cannulas and Similar Supplies in China by Import Volume, 2014
- Export Volume and Value of Other Needles, Catheters, Cannulas and Similar Supplies in China, 2012-2014
- Top 10 Export Destinations of Other Needles, Catheters, Cannulas and Similar Supplies in China by Export Volume, 2014
- Revenue and Net Income of Improve Medical, 2010-2014
- Revenue of Improve Medical (by Product), 2010-2014
- Revenue Structure of Improve Medical (by Product), 2010-2014
- Revenue of Improve Medical (by Region), 2010-2014
- Revenue Structure of Improve Medical (by Region), 2010-2014
- Gross Margin of Improve Medical, 2010-2014
- Gross Margin of Improve Medical (by Product), 2010-2014
- Gross Margin of Improve Medical (by Region), 2010-2014

- Revenue and YoY Growth Rate of Vacuum Blood Collection System of Improve Medical, 2010-2014
- R & D Costs and YoY Growth Rate of Improve Medical, 2011-2014
- New Products of Improve Medical and Its Subsidiaries, 2014
- Production and Marketing of Improve Medical, 2013-2014
- Revenue and Net Income of Improve Medical, 2013-2017E
- Product Structure of Kehua Bio-engineering
- Revenue and Net Income of Kehua Bio-engineering, 2010-2014
- Revenue of Kehua Bio-engineering (by Product), 2010-2014
- Revenue Structure of Kehua Bio-engineering (by Product), 2010-2014
- Revenue of Kehua Bio-engineering (by Region), 2010-2014
- Revenue Structure of Kehua Bio-engineering (by Region), 2010-2014
- Gross Margin of Kehua Bio-engineering, 2010-2014
- Gross Margin of Kehua Bio-engineering (by Product), 2010-2014
- Gross Margin of Kehua Bio-engineering (by Region), 2010-2014
- Revenue and YoY Growth Rate of Vacuum Blood Collection System of Kehua Bio-engineering, 2011-2014
- R & D Costs and YoY Growth Rate of Kehua Bio-engineering, 2011-2014
- New Products, Patents and CE Certifications of Kehua Bio-engineering, 2006-2014
- Revenue and Net Income of Kehua Bio-engineering, 2013-2017E
- Wego's Product Categories and Main Products
- Wego's Revenue and Net Income, 2010-2014
- Wego's Revenue (by Product), 2010-2014
- Wego's Revenue Structure (by Product), 2010-2014
- Revenue of Wego's Disposable Medical Supplies (by Product), 2012-2013
- Wego's Revenue and YoY Growth Rate (by Region), 2013H1 vs 2014H1
- Wego's Revenue Structure (by Region), 2014H1

- Wego's Gross Margin, 2010-2014
- Revenue and YoY Growth Rate of Wego's Blood Collection Products, 2010-2013
- Wego's Patents and Registration Certificates, 2007-2013
- Wego's R & D Costs and YoY Growth Rate, 2010-2014
- Wego's Number of Customers (by Group), 2008-2014
- Wego's Revenue and Net Income, 2012-2017E
- Revenue and Net Income of Rich Science Industry, 2012-2014
- Revenue of Rich Science Industry (by Product), 2012-2014
- Revenue Structure of Rich Science Industry (by Product), 2012-2014
- Revenue of Rich Science Industry (by Region), 2012-2014
- Revenue Structure of Rich Science Industry (by Region), 2012-2014
- Gross Margin of Rich Science Industry, 2012-2014
- Gross Margin of Rich Science Industry (by Product), 2012-2014
- Gross Margin of Rich Science Industry (by Region), 2012-2014
- R & D Costs and % of Total Revenue of Rich Science Industry, 2012-2013
- Vacuum Blood Collection System Revenue and % of Total Revenue of Rich Science Industry, 2012-2014
- Top 5 Customers of Rich Science Industry by Revenue, 2012-2013
- Top 5 Suppliers of Rich Science Industry by Procurement, 2012-2013
- Revenue and Net Income of Rich Science Industry, 2012-2017E
- Blood Collection Needle Classification and Composition of KDL
- Revenue and Net Income of China Sun Pharmaceutical Machinery, 2010-2014
- Revenue of China Sun Pharmaceutical Machinery (by Product), 2010-2014
- Revenue Structure of China Sun Pharmaceutical Machinery (by Product), 2010-2014
- Revenue of China Sun Pharmaceutical Machinery (by Region), 2010-2014
- Revenue Structure of China Sun Pharmaceutical Machinery (by Region), 2010-2014

- Gross Margin of China Sun Pharmaceutical Machinery, 2010-2014
- Gross Margin of China Sun Pharmaceutical Machinery (by Product), 2010-2014
- Gross Margin of China Sun Pharmaceutical Machinery (by Region), 2012-2014
- R & D Costs and YoY Growth Rate of China Sun Pharmaceutical Machinery, 2010-2013
- Revenue and Net Income of China Sun Pharmaceutical Machinery, 2013-2017E
- Revenue and Net Income of Yuyue Medical, 2010-2014
- Revenue of Yuyue Medical (by Product), 2010-2014
- Revenue Structure of Yuyue Medical (by Product), 2010-2014
- Revenue of Yuyue Medical (by Region), 2010-2014
- Revenue Structure of Yuyue Medical (by Region), 2010-2014
- Gross Margin of Yuyue Medical, 2010-2014
- Gross Margin of Yuyue Medical (by Product), 2010-2014
- Gross Margin of Yuyue Medical (by Region), 2010-2014
- R & D Costs and YoY Growth Rate of Yuyue Medical, 2010-2014
- Revenue and Net Income of Yuyue Medical, 2012-2017E
- BD's Revenue and Net Income, FY2010-FY2015
- BD's Revenue (by Business), FY2010-FY2014
- BD's Revenue Structure (by Business), FY2010-FY2014
- BD's Revenue (by Region), FY2010-FY2014
- BD's Revenue Structure (by Region), FY2010-FY2014
- BD's Gross Margin, FY2010-FY2014
- BD's Vacuum Blood Collection System Revenue and YoY Growth Rate, FY2010-FY2014
- Terumo's Revenue and Net Income, FY2010-FY2014
- Terumo's Revenue (by Division), FY2010-FY2013
- Terumo's Revenue Structure (by Division), FY2010-FY2013

- Terumo's Revenue (by Region), FY2010-FY2013
- Terumo's Revenue Structure (by Region), FY2010-FY2013
- Terumo's R & D Costs and YoY Growth Rate, FY2010-FY2013
- Terumo's Subsidiaries in China and Main Business
- Terumo's Layout in China
- Revenue and YoY Growth Rate of Terumo's Blood Management Division, FY2010-FY2013
- Nipro's Revenue and Net Income, FY2010-FY2014
- Nipro's Revenue (by Region), FY2011-FY2014
- Nipro's Revenue Structure (by Region), FY2011-FY2014
- Nipro's Revenue (by Division), FY2011-FY2014
- Nipro's Revenue Structure (by Division), FY2011-FY2014
- Revenue and YoY Growth Rate of Nipro's Medical-related Divisions, FY2011-FY2014
- Nipro's Major Subsidiaries in China and Business
- China's Vacuum Blood Collection Tube Consumption, 2013-2017E
- China's Total Health Expenditure and YoY Growth Rate, 2009-2013
- China's Per Capita Health Expenditure and YoY Growth Rate, 2009-2013
- China's Number of Patients and YoY Growth Rate, 2010-2014
- Urban and Rural Per Capita Income in China, 2010-2014
- China's Total Population and YoY Growth Rate, 2010-2014
- China's Population Aged over 65 and% of Total Population, 2010-2014
- Population Covered by Medical Insurance and Expenditure in China
- Revenue of Major Enterprises in China Vacuum Blood Collection Industry, 2010-2014
- Net Income of Major Enterprises in China Vacuum Blood Collection Industry, 2010-2014
- Gross Margin of Major Enterprises in China Vacuum Blood Collection Industry, 2010-2014
- Vacuum Blood Collection System Revenue of Major Enterprises in China Vacuum Blood Collection Industry, 2010-2014

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