China Blood Product Industry Report, 2017-2021

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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

China's blood product market size mushroomed in 2016 under the impetus of liberalization of limited-price policy, price rises in varying degrees and lot release volume growth for blood products in 2015, estimated to reach RMB23.8 billion throughout the year, up 16.7% from 2015.

China's blood product industry will develop at full speed boosted by downstream demand, accompanied by a steady rise in the number of plasma stations and consolidated profit margin improvement of plasma. The market size is expected to hit RMB47.5 billion in 2021.
Main features of blood product industry in China 2016 are shown as below:

1. As plasma supply increases, supply-demand balance can be seen in 2025
China's plasma collection volume has been increasing over recent years driven by blood product price deregulation and accelerated establishment of new plasma stations. In 2016, 6,964 tons of plasma was collected in China, up 19.8% year on year. Despite continuous growth, plasma collection volume still cannot meet the ever-increasing market demand. In the future, China will see plasma collection volume shooting up propelled by a growing number of plasma collection stations and is expected to achieve balance between plasma supply and demand in 2025.

2. A steady increase in lot release volume of main products
So far, Chinese blood products are still dominated by human albumin and human immunoglobulin for intravenous injection, which take an over 70% blood product market share. In 2016, human albumin and human immunoglobulin (pH4) for intravenous injection registered respective lot release volumes of 39.31 million bottles (10g/bottle) and 10.89 million bottles (2.5g/bottle), up 17.8% and 27.4% respectively year on year.

In addition, lot release volumes of domestic blood products in short supply such as blood coagulation factor VIII, human immunoglobulin and human prothrombin complex also witnessed substantial growth in 2016, respectively 38.0%, 143.8% and 20%.

3. R&D efforts intensified for new products; comprehensive utilization of plasma to be raised

At present, Chinese blood product enterprises can separate a maximum of 11 varieties of blood products from the plasma, 3-4 varieties for general firms, indicating an extremely low rate of comprehensive utilization of plasmas. To solve the problem, Chinese blood product enterprises are accelerating the development of new products, hoping to improve comprehensive utilization of plasma.

Blood coagulation factor VIII, for example, Guizhou Taibang Biological Products Co., Ltd., Jiangxi Boya Bio-Pharmaceutical Co., Ltd., Beijing Tiantan Biological Products Co., Ltd., Zhenxing Biopharmaceutical & Chemical Co., Ltd., Wuhan Zhongyuan Ruide Biological Products Co., Ltd. etc. are actively conducting clinical trials of blood coagulation factor VIII and expected to achieve mass production in next two years.

4 Plasma-oriented pattern continues

Blood product industry relies heavily on plasma materials – the number of plasma stations directly influences plasma collection volume, which then affects raw material supply of blood product enterprises. Therefore, the number of plasma stations and plasma collection volume determine corporate position in industry.

There are over 30 blood product manufacturing enterprises in China, but only more than 20 are able to maintain normal production. Among them, Hualan Biological Engineering, Inc., Shanghai RAAS Blood Products Co., Ltd. and China Biologic Products, Inc. boast relatively high volume of plasma collection, altogether accounting for 39.6% of total plasma collections in 2016.

The report highlights the following:

◆Analysis on development of China blood product industry, including status quo, policy environment, market supply & demand, market size, market structure and competition pattern;

◆Analysis on 8 market segments of China blood product industry, including development status, competition pattern and trends;

◆Analysis on 13 major enterprises, including operation, blood product business, etc.;

◆Summary & forecast and trends.

Number of Plasma Stations and Plasma Collection Volume of Major Blood Product Enterprises in China, 2016

	Number of Plasma Stations	Plasma Collection Volume
China Biologic Products, Inc.	14 (9 in Shandong, 2 in Guangxi, 2 in Guizhou, 1 in Hebei), plus 3 joint-stock companies e.g. Xi'an Hui Tian Blood Products Co., Ltd	About 860 tons
Hualan Biological Engineering, Inc.	23 (4 in Guangxi, 1 in Guizhou, 14 in Chongqing (including 6 plasma collection substations), 4 in Henan)	More than 1,000 tons
Shanghai RAAS Blood Products Co., Ltd.	33 (including 3 approved, 2 under construction; 1 under construction of TONROL Biology)	Nearly 900 tons
Beijing Tiantan Biological Products Co., Ltd.	18	584.2 tons in 2015
Zhenxing Biopharmaceutical & Chemical Co., Ltd.	19 (9 in Guangdong, 5 in Guangxi, 5 in Shanxi)	143.3 tons of plasma put into production in 2016H1
Jiangxi Boya Bio-Pharmaceutical Co., Ltd.	10	About 250 tons
Humanwell Healthcare Group Co., Ltd.	4	--

Source: ResearchInChina

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