



China Vacuum Blood Collection Device Industry Report, 2017-2021

Sep. 2017

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 vacuum blood collection device industry now flourishes after start-up and growth stages. Along with steady improvement in economic environment, rising per-capita disposable income, greater awareness of health and larger health expenditure, the spending on examination also increases, so does the demand for vacuum blood collection tubes. The country's consumption of vacuum blood collection tubes has shown an AAGR of over 10% between 2009 and 2016, reaching 5.973 billion pieces in 2016.

There have been 115 vacuum blood collection tube producers in China by Sept 20, 2017, led by Guangzhou Improve Medical Instruments, Sanli Group, Zhejiang Gongdong Medical Technology, Chengdu Rich Science Industry, Jiangsu KANGJIAN Medical Apparatus, Weigao Group and Lingen Precision Medical Products. In addition, the vast development potential has attracted foreign enterprises like BD, Sekisui Medical, and Greiner into China.

Local Chinese enterprises occupy primarily the mid and low-end vacuum blood collection market due to relatively outdated technologies, while foreign players still seize the high-end market. In 2016, the Chinese vacuum blood collection tube market was dominated by BD, Guangzhou Improve Medical Instruments, Sanli Group and Zhejiang Gongdong Medical Technology, holding a combined 42.3% market share.

In the coming years, the Chinese vacuum blood collection market will be characterized as follows:

1. Demand for vacuum blood collection tubes will grow steadily.

Authorities including the State Council have introduced policies to provide strong support for medical equipment industry in recent years. As a branch of the medical equipment industry, vacuum blood collection equipment will also benefit. Driven by downstream demand and favorable policies, the country's demand for vacuum blood collection tubes is expected to maintain a higher growth rate over the next five years, hitting 10.677 billion pieces in 2021.

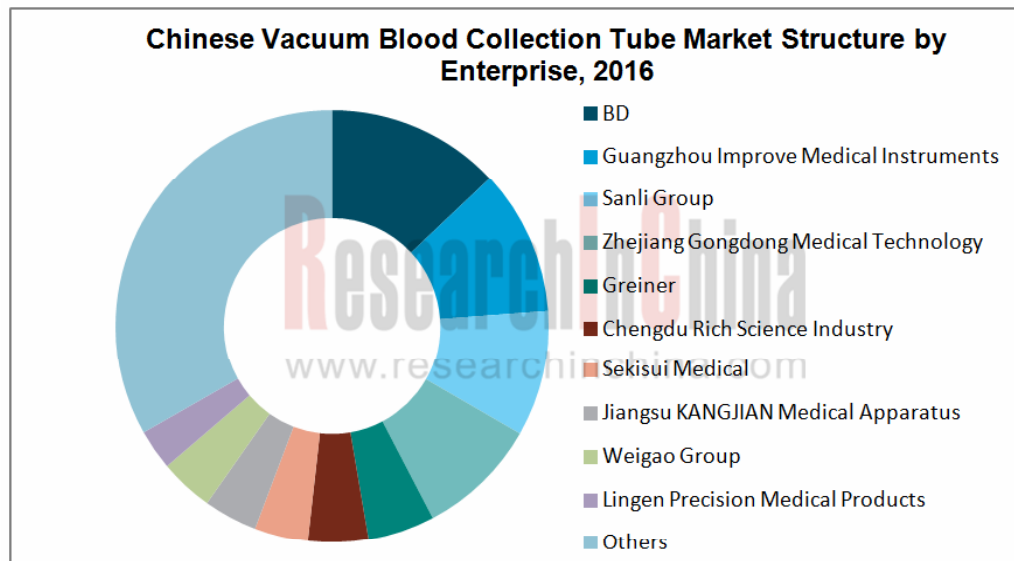
2. Vacuum blood collection device industry will become more highly concentrated.

Up to 115 vacuum blood collection tube manufacturers have caused severe overcapacity. Moreover, engagement of listed companies like Hunan China Sun and Jiangsu Yuyue Medical Equipment & Supply has intensified competition across the sector. However, as the country strengthens its supervision over the industry, the space for small companies will be squeezed, resulting in a gradual decrease in number of manufacturers and a higher market concentration.

3. Market share of foreign companies will decline.

Some local companies have maintained stable spending on R&D in recent years, seeking to narrow the gap with foreign peers. Guangzhou Improve Medical Instruments, Lingen Precision Medical Products and Weigao Group have broken monopoly of foreign players in manufacturing of high-end blood collection tubes like plasma preparation tube for nucleic acid test. Meanwhile, foreign companies represented by BD have frequently recalled their products due to quality problems, producing an adverse effect on their development in China. Under such circumstance, foreign players will suffer a gradual decline in market share.

- ◆ China Vacuum Blood Collection Device Industry Report, 2017-2021 focuses on the followings:
- ◆ Overview of global vacuum blood collection device industry (development course and status quo, etc.);
- ◆ Vacuum blood collection equipment industry in China (development environment, status quo, relevant policies, competitive landscape, import & export, development trends, etc.);
- ◆ 13 domestic and 4 foreign vacuum blood collection-related enterprises (operation, revenue structure, vacuum blood collection business, etc.)



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