China Vacuum Blood Collection Device 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 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.)

Chinese Vacuum Blood Collection Tube Market Structure by Enterprise, 2016

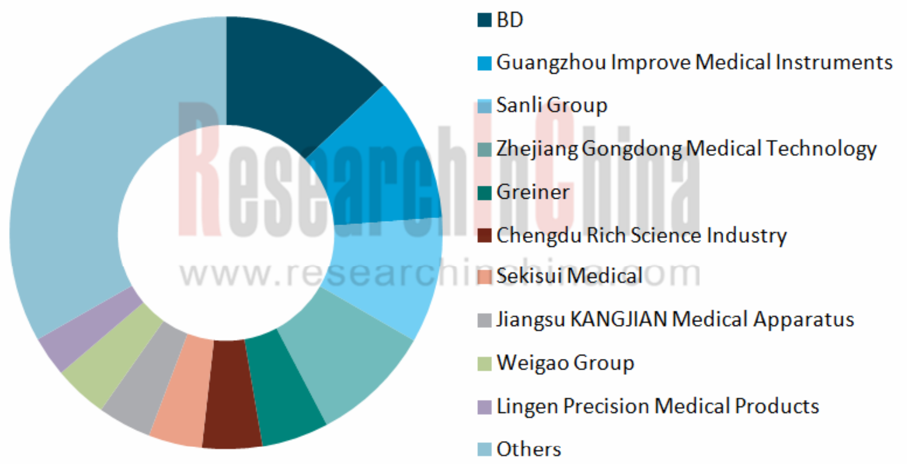

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Table of contents

Table of contents

Selected Charts

- 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
- Global Consumption of Vacuum Blood Collection Tubes, 2008-2016
- China's GDP, 2012-2017
- Residents' Per-capita Disposable Income and YoY Growth in China, 2011-2016
- Number of Medical and Healthcare Institutions in China, 2015-2017
- Number of Hospitals in China, 2009-2017
- Number of Hospitals in China by Economic Type, 2009-2017
- Clinic Visits of Medical Institutions in China, 2015-2017
- Clinic Visits of Hospitals in China, 2009-2017
- Clinic Visits of Hospitals in China by Economic Type, 2012-2017
- Health Expenditure in China, 2010-2016
- Health Expenditure in China, 2016-2021E
- Population Aged over 60 in China, 2009-2021E
- Public Hospitals' Inspection Revenue and % of Total Inspection Revenue in China, 2010-2016
- Public Hospitals' Inspection Revenue and % of Total Inspection Revenue in China, 2016-2021E
- Vacuum Blood Collection Tube Consumption and YoY Growth in China, 2009-2016
- Polices Concerning Medical Equipment Industry in China, 2007-2017
- Vacuum Blood Collection Tube Market Pattern in China
- Vacuum Blood Collection Tube Market Share in China, 2016
- Vacuum Blood Collection Needle Market Pattern in China
- Vacuum Blood Collection Revenue of Major Vacuum Blood Collection System Companies in China, 2014-2017
- Import Volume and Value of Other Needles, Catheters, Cannulas and Similar Supplies in China, 2012-2017

Selected Charts

- TOP10 Import Sources of Other Needles, Catheters, Cannulas and Similar Supplies in China by Import Volume, Jan-Jul 2017
- Export Volume and Value of Other Needles, Catheters, Cannulas and Similar Supplies in China, 2012-2017
- TOP10 Export Destinations of Other Needles, Catheters, Cannulas and Similar Supplies in China by Export Volume, Jan-Jul 2017
- Revenue and Gross Industrial Output Value of Medical Equipment Industry in China, 2008-2016
- Consumption of Vacuum Blood Collection Tubes and YoY Growth in China, 2016-2021E
- Cases of Listed Companies' Layout in Vacuum Blood Collection Device Industry in China
- R&D Costs of Major Vacuum Blood Collection Device Companies in China, 2014-2017
- Main Products and Application of Guangzhou Improve Medical Instruments
- Revenue and Net Income of Guangzhou Improve Medical Instruments, 2013-2017
- Revenue Breakdown of Guangzhou Improve Medical Instruments by Product, 2014-2017
- Revenue Structure of Guangzhou Improve Medical Instruments by Product, 2014-2017
- Gross Margin of Guangzhou Improve Medical Instruments by Product, 2014-2017
- Guangzhou Improve Medical Instruments' R&D Costs and % of Total Revenue, 2013-2017
- Output, Sales Volume and Inventory of Guangzhou Improve Medical Instruments' Vacuum Blood Collection Systems, 2013-2016
- Guangzhou Improve Medical Instruments' Revenue from Vacuum Blood Collection Systems and % of Total Revenue, 2014-2017
- Revenue and Net Income of Guangzhou Improve Medical Instruments, 2016-2021E
- Revenue and Net Income of Chengdu Rich Science Industry, 2013-2017
- Revenue Breakdown of Chengdu Rich Science Industry by Product, 2013-2017
- Revenue Structure of Chengdu Rich Science Industry by Product, 2013-2017
- Revenue Breakdown of Chengdu Rich Science Industry by Region, 2013-2017
- Revenue Structure of Chengdu Rich Science Industry by Region, 2013-2017
- Gross Margin of Chengdu Rich Science Industry, 2013-2017
- Chengdu Rich Science Industry's R&D Costs and % of Total Revenue, 2013-2017
- Chengdu Rich Science Industry's Revenue from Vacuum Blood Collection Business and % of Total Revenue, 2013-2017
- Revenue and Net Income of Chengdu Rich Science Industry, 2016-2021E

Selected Charts

Selected Charts

- Revenue Breakdown of Shandong Yaohua Medical Instrument by Product, 2014-2016
- Revenue Structure of Shandong Yaohua Medical Instrument by Product, 2014-2016
- Gross Margin of Shandong Yaohua Medical Instrument, 2014-2017
- Shandong Yaohua Medical Instrument's R&D Costs and % of Total Revenue, 2014-2017
- Shandong Yaohua Medical Instrument's Revenue from TOP5 Clients and % of Total Revenue, 2015-2017
- Shandong Yaohua Medical Instrument's Revenue from Vacuum Blood Collection Business and % of Total Revenue, 2014-2016
- Revenue and Net Income of Shandong Yaohua Medical Instrument, 2016-2021E
- Main Vacuum Blood Collection Products of Jiangsu KANGJIAN Medical Apparatus
- BD's Revenue and Net Income, FY2013-FY2017
- BD's Revenue Breakdown by Business, FY2013-FY2017
- BD's Revenue Structure by Business, FY2013-FY2017
- BD's Gross Margin, FY2013-FY2016
- BD's Revenue from Vacuum Blood Collection Business and % of Total Revenue, FY2013-FY2017
- BD's Main Business in China
- Terumo's Revenue and Net Income, FY2012-FY2016
- Terumo's Revenue Breakdown by Business, FY2012-FY2016
- Terumo's Revenue Structure by Business, FY2012-FY2016
- Terumo's Revenue from Blood Management Division and % of Total Revenue, FY2012-FY2016
- Terumo's Subsidiaries in China and Main Business
- Terumo's Layout in China
- Nipro's Revenue and Net Income, FY2013-FY2017
- Nipro's Revenue Breakdown by Business, FY2014-FY2017
- Nipro's Revenue Structure by Business, FY2014-FY2017
- Nipro's Revenue Breakdown by Region, FY2014-FY2017
- Nipro's Revenue Structure by Region, FY2014-FY2017

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Selected Charts

- Nipro's Revenue from Medical Business and % of Total Revenue, FY2014-FY2017
- Nipro's Major Subsidiaries in China and Business
- Presence of Greiner Bio One's Production Bases
- Greiner Bio One's Revenue and YoY Growth, FY2013-FY2016
- Greiner Bio One's Vacuum Blood Collection Products

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