China Blood Product Industry Report, 2019-2025

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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

With the adjustment of the national medical insurance catalogue, the clinical application and reimbursement rate of almost all blood products have been greatly improved, and the market for blood products has been further opened. In 2018, the lot release volume of Chinese main blood products increased 13.5% year on year to 73.94 million bottles, of which the lot release volume of human albumin soared 13.8% year on year to 45.17 million bottles.

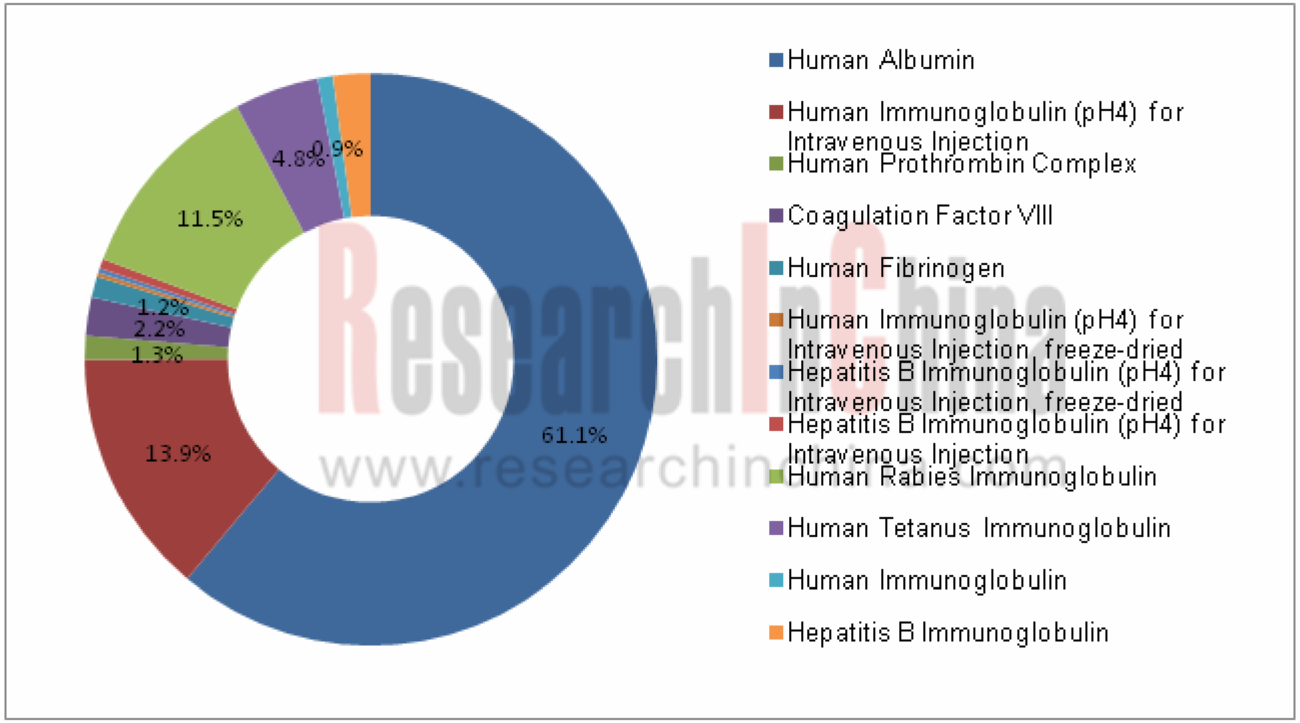
At present, Chinese blood products are still center on albumin, of which human albumin occupies a relatively high proportion. By the lot release volume, human albumin accounts for about 60%, followed by human immunoglobulin for intravenous injection with about 15%, human rabies immunoglobulin and tetanus immunoglobulin with more than 5% each.

The proportion of human fibrinogen, three special immunoglobulins, human prothrombin complex and coagulation factor VIII is relatively low, especially coagulation factor products, life-saving drugs for hemophilia patients, are often in shortage. The main reason is that the current utilization rate of plasma in China is low, and many companies are unable to produce such blood products. Therefore, China's blood product industry still faces big problems: how to further raise the plasma collection volume, how to expand the production scale of various products, how to improve the resource utilization, and how to alleviate the tight supply.

There are over 30 blood product manufacturers in a less concentrated industry in China. Among them, China Biologic Products, Hualan Biological Engineering, Shanghai RAAS Blood Products and Beijing Tiantan Biological Products are more competitive, as they have richer blood product lines and adequate supply of raw materials from plasma stations.

In the future, China's blood product industry will see faster industry integration and higher concentration.

Lot Release Volume Structure of Major Blood Products in China, 2018



Number of Plasma Stations and Plasma Volume of Major Blood Product Enterprises in China, As of Jan. 2019

	Number of Plasma Stations	Plasma Volume 2016	Plasma Volume 2017	Plasma Volume 2018H1
Beijing Tiantan Biological Products	57 (47 in operation and 10 newly-approved (including substations))	683 tons	862.17 tons	--
Shanghai RAAS Blood Products	41	Nearly 900 tons	Over 1,000 tons	Up 10% yr-on-yr
China Biologic Products	26 (8 of wholly-owned subsidiary Guizhou Taibang), 15 of subsidiary Shandong Taibang), and 3 of joint-stock company- Xi'an Hui Tian Blood Products)	Approximately 860 tons	--	--
Hualan Biological Engineering	24 (4 in Guangxi, 1 in Guizhou, 14 in Chongqing, and 5 in Henan)	More than 1,000 tons	Nearly 1,100 tons	--
Zhenxing Biopharmaceutical & Chemical	13	303.9 tons	322.8 tons	About 200 tons
Yuanda Shuyang	13	--	--	--
Jiangxi Boya Bio-Pharmaceutical	12	About 250 tons	About 320 tons	--
Beijing Bohui Innovation Technology	12 (4 of Da'an Pharmaceutical), 8 of Guangdong Wellen Biological Pharmaceutical)	--	180 tons	--
Kangbao Biological Product	9	--	--	--
Weiguang Biological Products	7	319.52 tons	Over 340 tons	--
Nanyue Biopharming	7	--	--	--
Wuhan ZhongyuanRuide Biological Products	4	--	--	--
Green Cross (China)	4	--	--	--

Source: ResearchInChina

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