

China Vacuum Blood Collection Device Industry Report, 2019-2025

Oct. 2019

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

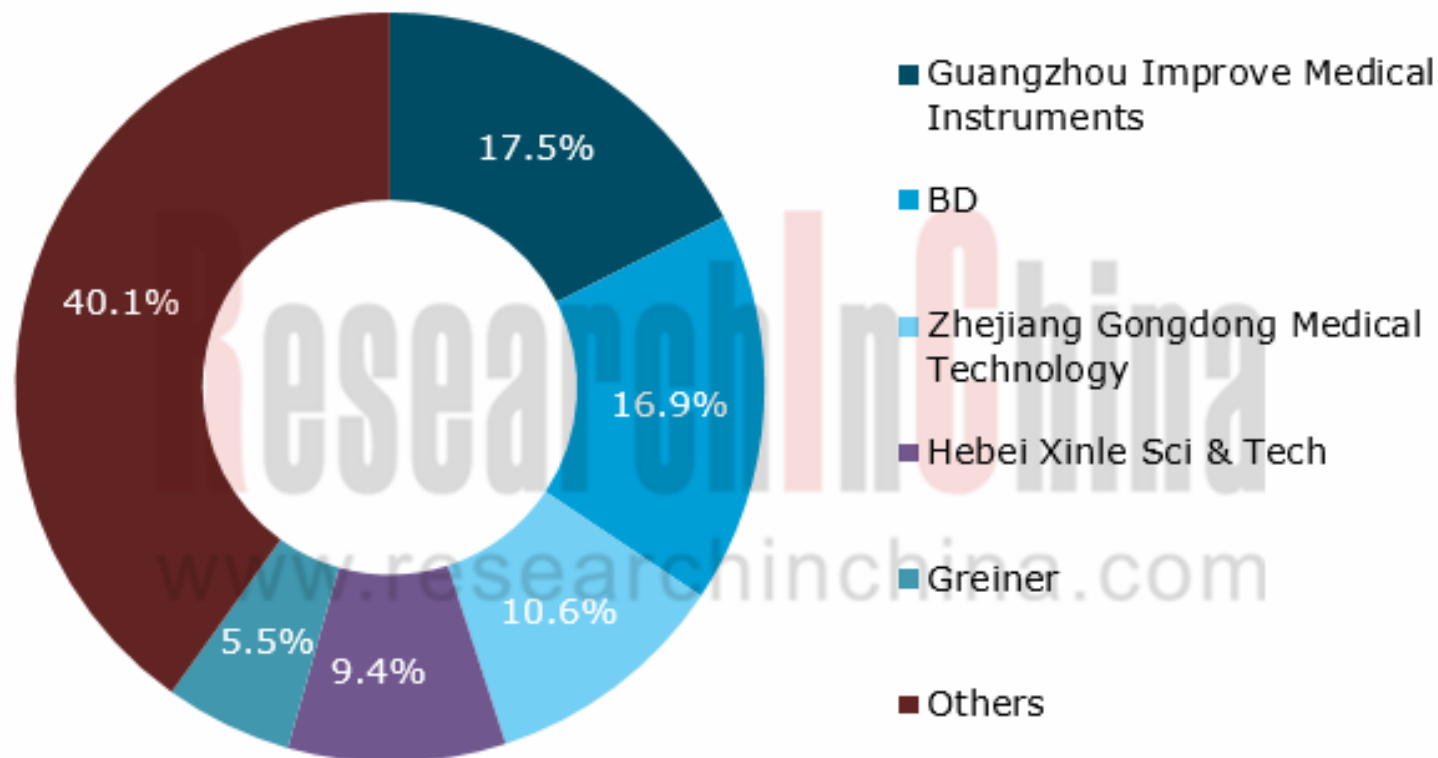
As laboratory medicine advances, favorable policies are issued and people live a better life and care more about their health, vacuum blood collection systems get increasingly used. In 2018, global vacuum blood collection tube market was expected to be valued at \$3,676 million, compared with \$3,331 million in 2017.

It is in the last decade that Chinese medical institutions saw rising visits of diagnosis and physical examination, which fueled immense demand for vacuum blood collection tubes. In the context that benign policies are implemented and medical insurance covers ever more people, vacuum blood collection tube market in China will sustain growth. In 2018, China's vacuum blood collection tube market was worth RMB1,502.3 million on one estimate, after reaching RMB1,339 million (up 16.1% YoY) in 2017.

China's vacuum blood collection tube market features a low concentration and fierce competition. So far, foreign giants like BD, Sekisui Medical and Greiner, have ruled the roost in the high-end market of China in their race to deploy the field; there are over 100 Chinese companies like Guangzhou Improve Medical Instruments Co., Ltd., Liuyang SANLI Medical Technology Development Co., Ltd., Zhejiang Gongdong Medical Technology Co., Ltd., Chengdu Rich Science Industry Co., Ltd., Jiangsu Kangjian Medical Apparatus Co., Ltd., Shandong Weigao Group Medical Polymer Co., Ltd. and Lingen Precision Medical Products (Shanghai) Co., Ltd.. In 2018, Guangzhou Improve Medical Instruments Co., Ltd., BD, and Zhejiang Gongdong Medical Technology Co., Ltd. as the top three players commanded 17.5%, 16.9% and 10.6% of the Chinese vacuum blood collection tube market, respectively.

Guangzhou Improve Medical Instruments Co., Ltd. as the bellwether in China's vacuum blood collection tube industry, is the only FDA-registered company in the country. Its self-developed third-generation vacuum blood collection system helps medical workers acquire qualified human venous blood specimens rapidly while serving as an effective inhibition solution to variation of blood specimens after separation and protecting the safety of workers, specimens, devices and environment. In 2018, the company registered revenue of RMB336 million from vacuum blood collection systems, a year-on-year increase of 9.4%.

China's Vacuum Blood Collection Tube Market Structure by Company, 2018



Source: ResearchInChina

Zhejiang Gongdong Medical Technology Co., Ltd. as a disposable medical consumables production base of China, has forged long-term strategic partnerships with world-renowned medical device manufacturers like McKesson, IDEXX, Medline, Thermo Fisher, As One, Henry Schein and Cardinal. By the end of 2018, it had boasted a capacity of 500 million vacuum blood collection tubes a year. In June 2019, the company released its IPO prospectus for being listed on Shanghai Stock Exchange. It proposed to spend the raised funds of RMB178.37 million on the 620 million vials/year vacuum blood collection tubes capacity expansion project.

As GDP per capita increases and people become more aware of health, medical services are burgeoning in China. Meanwhile, population aging and the two-child policy in China conduce to its vacuum blood collection industry, expectedly sending the industry scale to RMB2.4 billion in 2025.

China's vacuum blood collection industry tends to be more concentrated. Up to date, more than 100 vacuum blood collection tube companies in China are confronted with serious overcapacity. Market shares of micro and small players will be squeezed by leaders such as Guangzhou Improve Medical Instruments Co., Ltd., Zhejiang Gongdong Medical Technology Co., Ltd. and Hebei Xinle Sci & Tech Co., Ltd., as national regulatory policies are being toughened.

China Vacuum Blood Collection Device Industry Report, 2019-2025 highlights the following:

- Global vacuum blood collection industry (development history, status quo, etc.);
- China vacuum blood collection industry (development environment, status quo, policies, competitive landscape, import & export and development tendencies);
- 14 Chinese and 4 foreign companies (operation, revenue structure, vacuum blood collection business, etc.)

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