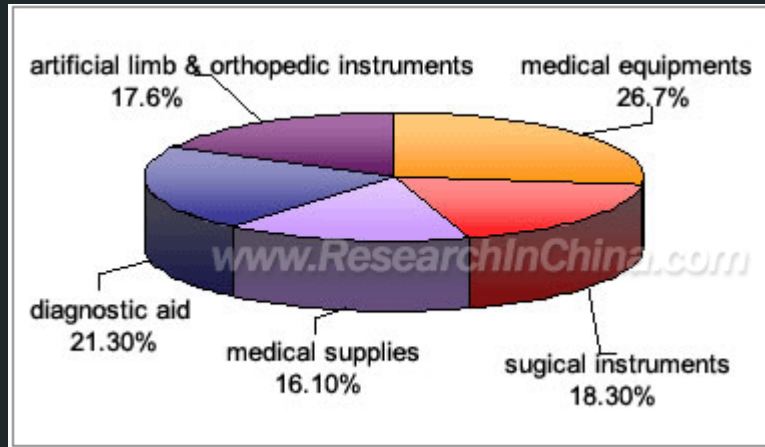


Global and China Medical Devices Industry Report, 2009



The development of medical devices industry differs afar in developed countries and developing countries. In emerging markets like China and India, it is the economic growth that drives the expansion of market scale, but in most cases, the expansion just means the increase of market capacity. Comparatively, the developed countries' market growth focuses on the new technology and the new product development. With the prevalence of digital technologies and new materials, a great change might happen to the current medical devices. As is expected, the annual sales of novel digital medical devices will hit more than US\$100 billion in the following years.

Global Medical Appliance Market Demand Structure in 2008



Source: ResearchInChina

America, Europe and Japan are listed top three in sequence in the global medical appliance market. The overall market size of the three occupied nearly 78% of global medical devices market in 2008. The global medical appliance market size declined 0.4 percentage points to US\$206.59 billion in 2008, but a rise of 6% from a year earlier. In 2008, the China's medical devices industry achieved CNY69.435 billion of sale, merely 5% of global market scale.

The hi-tech medical equipment, a focus of competition among multinational corporations, is also one of the fastest growing industries around the world. With the improvement of the people's living standard, the global demand for medical healthcare has been enlarging, which stimulates the investments of countries in such field. Currently, the hi-tech medical appliance market is monopolized by only few large multinational enterprises including GE, Siemens, Toshiba, Hitachi, HP and Philips etc. Chinese market is also occupied by those multinational corps. In addition, GE announced in 2008 that it would roll out five new products to meet the demand of Chinese rural basic medical treatment market before 2010. Wuxi R&D Center (China) answers for the localized design and production of the products. The China's local enterprises have to face strong competition from the giants in the long run.

Market Share of Global Three Leading Medical Imaging Equipment Manufacturers by Market Segment, 2008 (CNY100 million)

	CT	Ultrasonic	MRI
GE	4.5	5.9	3.6
Siemens	2.6	3.4	2.1
Philips	1.9	2.5	1.5
Other	3.9	5	3.1

Source: ResearchInChina

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