

China Diagnostic Reagent Market Report, 2007-2009



China's diagnostic reagent industry had lagged behind other countries for a long time. Since 1980s, China's reagent for clinical diagnosis has started entering the industrialization process, following the implementation of China's reform and open-up policy.

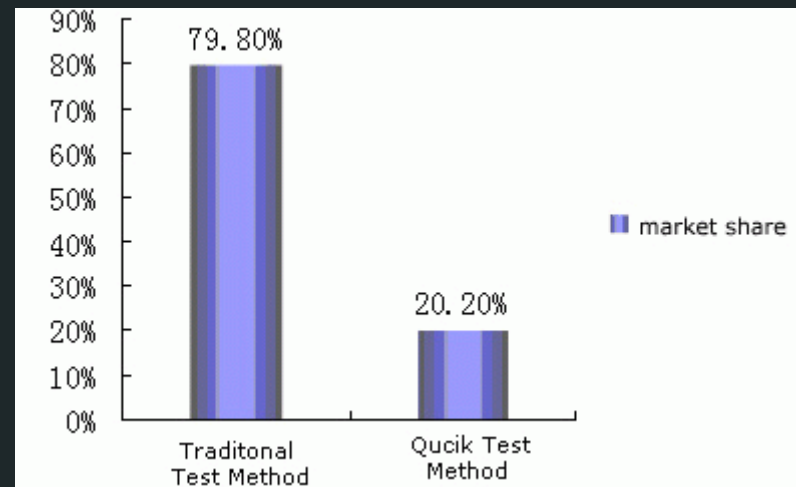
From the perspective of current situation in China, China's diagnostic reagent sector is still in its infancy. According to the statistics, China's current diagnostic reagent market size is around CNY3 billion to CNY4 billion, taking up around 1/14 of the global market. Though China's diagnostic reagent sector is just in its early stage, its high rate of profit return is a major factor to lure many investors into entering the market. Long-term competition in the sector has scaled largely down the number of companies. At present, the sector has a high degree of market concentration in key products. A group of powerful companies, such as Wantai Biological Pharmacy Enterprise Co., Ltd., Shanghai Kehua Bio-engineering Co., Ltd. and Kinghawk Pharmaceutical Co., Ltd., with good performance in R&D and production has developed rapidly, grabbing a considerable market share.

Clinical practice in the developed countries shows that diagnostic expenditure accounts for 20% to 30% of the total medical expenditure. But the ratio in China is less than 10%, indicating a huge market is to be exploited. It is forecast that China's vitro diagnostic reagent market will grow at a rate of around 20%. Opportunities are always accompanied by challenges. The development of China's diagnostic reagent sector in the next five years is still unknown, but it is well worth expecting.

Market value of diagnostic reagent increases faster than its output. Shifting from traditional microbiological test method to quick test method is the driver of the rapid growth of diagnostic reagent market. As for these new test methods, each of diagnostic reagents is of a higher price, but it is becoming more popular, as it is convenient and results come out faster than the traditional method. At present, the traditional test method with a total of 963 million doses takes up 79.8% of market share, and the quick test method with a total of 232 million doses, including convenient reagent, immunity reagent and molecule reagent, takes up 20.2% of market share.

In 2008, the quick test method will grow exponentially, and the market share of the traditional test method is expected to drop to 69.4% in the full year. Each of reagents of the quick test method will have a considerable growth in the next five years and by then their annual output will be doubled on the basis of the current output. As the average price of the quick test reagent is higher than the traditional test reagent, so rises in prices will be more evident than increases in production.

Current Market Share of Traditional Test & Quick Test



Source: ResearchInChina

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