This report

◆ Casts light on not only the current development, import & export, and development outlook of Chinese medical monitor market

◆ Analyzes the operation and development of such manufacturers as Mindray, GE, Philips, Guangdong Biolight Meditech Co., Ltd. (Biolight), and Shenzhen Goldway Industrial Inc. (Goldway)

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Abstract

Against the background of economic development, population aging, and people’s enhanced awareness of health care, China’s medical monitor market has been expanding year by year. In 2009, the market size reached RMB2.04 billion, up 20.7% YoY, and medical monitor occupied 2.5% in the medical devices. With the synergy of the rising requirements for monitor from critical patients and the development of monitor from ICU to general ward, medical monitors have been further popularized in China. The popularization rate of monitors in China arrived at 20% in 2009, still a long way from the 80% in the USA, but indicating the huge market potential.

Market Size and YoY Growth of Medical Monitor in China, 2007-2009 (Unit: RMB bn, %)

Source: ResearchInChina
From the perspective of product structure, the proportion of high-end products to ordinary products approximated 4:6 in the Chinese medical monitor market in 2009.

The high-end product sector is dominated by foreign brands. In 2009, Philips and GE took more than 50% market shares, while domestic brands like Mindray were tapping into this market by virtue of their own technical advantages.

The ordinary product sector is occupied by domestic brands with price edge, but foreign brands are trying to enter the market through various channels.

Mindray, the only domestic enterprise that can compete with Foreign brands in Chinese medical monitor market, purchased the patient monitoring business of American Datascope in 2008, and thus became the third largest brand in global patient monitoring & life support field. In 2009, it enjoyed 49% share in Chinese medical monitor market.

GE and Philips give priority to high-end monitor products, and held respective 18% and 14% in Chinese medical monitor market in 2009.

Biolight possesses a comprehensive product line of monitors and ranks the 7th in Top 10 Competitive Enterprises in Anaesthesia and Monitoring Sectors of Chinese Medical Device Industry in 2009-2010; the monitor output of Goldway broke through 10 thousand in 2007, and in 2008, all outstanding shares of Goldway were acquired by Philips and Goldway became a part of patient monitoring system within Philips’ Healthcare division.

With price advantage, enterprises like Shenzhen Creative Industry Co., Ltd., Edan Instruments, Inc., Shanghai Kohden Medical Electronic Instrument Corporation, and Beijing Choice Electronic Tech. Co., Ltd. hold significant shares in Chinese ordinary medical monitor product market and take the lead among domestic monitor manufacturers.
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