



China Medical Imaging Device Industry Report, 2010

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This report

- ◆ **Casts light on the development of China Medical Imaging Device Industry**
- ◆ **highlights not only the market segments and import & export of such medical imaging devices as CT, ultrasound, and MRI, but the operation and development of fourteen major medical imaging device manufacturers (including GE, Siemens, Philips, Hitachi, Shimadzu, Toshiba, Mindray, Wandong Medical, Neusoft Medical Systems, Anke, Xingaoyi, Chison, Perlove Radial-Video Equipment, and Belson) in Chinese market.**

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Abstract

Fueled by the booming social demand, the handsome remuneration of the industry, as well as medical reform, the medical imaging device industry of China has witnessed rapid growth in recent years. During 2006-2009, the market size of the industry rose to RMB9.42 billion from RMB6.87 billion with a CAGR of 10.9%, and promisingly, it will maintain the growth rate of 10.4% till 2012.

Market Size and Growth Rate of Medical Imaging Device in China, 2006-2012E (RMB bn)



Source: ResearchInChina

In 2009, China's medical imaging device industry was dominated by six foreign enterprises, i.e. GE, Siemens, Philips, Hitachi, Toshiba, and Shimadzu, with over 80% market shares; while Mindray Medical, Wandong Medical, and Neusoft Medical Systems, the three largest Chinese enterprises of medical imaging device, merely held a total share of 10% or so.

Since the mature markets in Europe, America, and Japan tend to be saturated, such emerging markets as China and India will become the future growth momentum for foreign enterprises who have intensified investment and M&A in China, constructed production and R&D bases, raised capacity, integrated global supply chain, and meanwhile launched popular products in accordance with the demand of Chinese market.

Considering the fact that the medical reform in China highlights the basic medical institutions, GE, Siemens, Philips, etc. have vigorously carried strategies oriented to basic medical market, for instance, GE has integrated the channels of Shinva Medical, while Siemens has practiced 'SMART' strategy.

Medical Imaging Device Investment Projects of Foreign Enterprises in China, 2005-2010 (Unit: US\$ mln)

Investor	Time	Location	Value	Project
GE	Dec.2008	Shandong	4.9	Joint venture of Shinva GE Medical Systems Co., Ltd
Phillips	Jul.2010	Shanghai	/	Acquisition on Shanghai Apex Electronics
Phillips	Nov.2009	Suzhou	54	Medical imaging base in China
Siemens	Dec.2005	Shanghai	41	Asian technical center
Siemens	Mar.2005	Shenzhen	4	Siemens (Asia) magnetic resonance R&D and production base
Toshiba	Apr.2007	Beijing	49	Establishment of Toshiba Medical Systems China Co., Ltd
Hitachi	Dec.2006	Beijing	7.8	Establishment of Hitachi Medical Systems (Beijing)
Hitachi	Apr.2006	Guangzhou	3.4	Establishment of Hitachi Medical Systems (Guangzhou)

Source: ResearchInChina

Confronted with foreign enterprises' seizure of low and medium-end market shares, Chinese counterparts are aggressively exploring the high-end markets and overseas business. After years of efforts in scientific research, talent cultivation, and manufacturing technology, Chinese enterprises have bridged the gap with foreign enterprises in product function and quality, took the initiative in low and medium-end products by virtue of price and channel advantages, and realized import substitution. Wandong Medical obtained the bid winning ratio of over 50% in the public bidding of rural medical devices in 2009.

Against economic recession, the developed countries have reduced the public health expenditure and been urgently in need of products with high performance-price ratio, which has brought opportunities for Chinese enterprises to export more affordable medical imaging device of high quality. As a leading producer of medical imaging device, Mindray Medical surpassed GE and Philips to become the largest exporter of monochromatic ultrasonic tester in China in 2009; and in the first three quarters of 2010, the overseas revenue of the company recorded US\$290 million, up 20.6% from the same period of last year.

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