



China Home Medical Device Industry Report, 2011-2012

Apr. 2012

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.

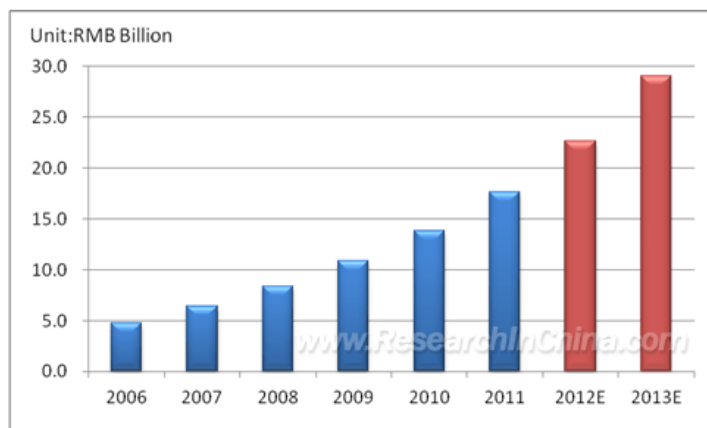
INFORMATION SOURCES

The primary information sources include Ministry of Health of the People's Republic of China, CAMDI, China Chamber of Commerce for Import & Export of Medicines & Health Product ,NBS(National Bureau of Statistics of China), WIND and China Custom etc.

Abstract

With the continuous development of the Chinese economy, the home medical device industry has developed rapidly in China. The market size reached RMB 17.66 billion in 2011, up 28.3% year on year, and the CAGR in 2006-2011 was up to 29.8%. But on the other hand, home medical devices only account for a small share in the medical equipment industry in China, which was only 13% in 2011, far lower than the global level of 25%, indicating huge growth potential. It's expected that the home medical device market size will reach RMB 29 billion in China in 2013.

Operating Revenue of Home Medical Device Industry in China, 2006-



Source: ResearchInChina, China Home Medical Device Industry Report, 2011-2012

In China's home medical device industry, massage appliances, electronic sphygmomanometers, blood glucose meters are the main products, the market sizes of which are expected to reach RMB 6.59 billion, RMB 5.2 billion and RMB 2.4 billion in 2013, with the input of national medical insurance, enhancement of consumption level and changing consumer attitudes.

At present, the global high-end home medical device market is basically dominated by the products of the US, German and Japanese companies. Many well-known multinational companies have built up production bases in China to grab market share. For example, Omron occupies about 70% of China's electronic sphygmomanometer market, while Johnson & Johnson, Roche, Abbott collectively occupy about 60% of China's blood glucose meter market. After years of development, Chinese home medical device companies have made considerable progress and have significant advantages in the medium and low-end market, and there have emerged a number of enterprises with global competitiveness, such as Jiangsu Yuyue Medical Equipment Inc., Andon Health Co., Ltd., Xiamen Comfort Science & Technology Group, and Changsha Sinocare Inc.

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The Report covers the following aspects:

- ◆ Market size, competition and development forecast of the global home medical device industry;
- ◆ Market size, competition, development trend and entry barrier of the Chinese home medical device industry;
- ◆ Development environment, including policy environment, social environment and impact of upstream and downstream industries, of the Chinese home medical device industry;
- ◆ Key products of the Chinese home medical device industry, including their market size, competition, trading and development forecast;
- ◆ Operation and competition of five global home medical device manufacturers in China, including Omron, Johnson & Johnson, Siemens, Ceragem and Roche;
- ◆ Operation, investment, merger and acquisition, product competition and development forecast of 11 Chinese home medical device manufacturers.

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