



**China Independent Clinical Laboratory
Industry Report, 2011-2012**

Aug. 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 NBS (National Bureau of Statistics of China), China Customs and annual reports of listed companies etc.

Abstract

The independent clinical laboratory industry starts late and is still in its infancy in China, featuring a limited market size of less than RMB2 billion at present which just accounts for 1%-2% of the total revenue of medical diagnosis. Additionally, the independent clinical laboratories in home market can conduct 1,000 or more diagnostic items, while those in a developed country such as the U.S. are capable of carrying out as many as 4,000 diagnostic items. What is worse, China lags far behind developed countries in diagnostic levels, especially in genetic/molecular diagnostics market segment.

Currently, there are roughly 110 independent clinical laboratories in China, but most of them are small sized. Kingmed Diagnostics, Zhejiang D.A. Diagnostics, ADICON Clinical Laboratories, Inc. and Gaoxin-Da An (invested by DAAN Gene) are the leading companies in Chinese independent clinical laboratory industry and adopt comprehensive diagnostic service mode on the basis of chain operation, together making up approximately 70% market share. Although with a small portion of market share, Beijing NYMPHAVN Biotechnology, Beijing Adinovo Genetic Technology and Zhiyuan Medical Inspection Institute occupy a certain position in the market by virtue of special service.

The demand from downstream market and the introduction of favorable policies like encouraging the development of private medical institutions arouse keen interest of foreign companies in Chinese independent clinical laboratory market. A large number of foreign enterprises have tapped into Chinese market through technical cooperation or direct capital injection.

In early 2012, DAAN Gene (002030) and Life Technologies co-founded Life Technologies DaAn Diagnostics and announced the official launch of DNA sequencing molecular diagnostics project.

In February 2012, Centre Testing International Corporation cooperated with Amcare Labs International in establishing Johns Hopkins (China) Medical Laboratories in Shanghai (registered capital of USD10 million and equity ratio of 51:49) to carry out the independent medical testing service.

In March 2012, Kindstar Global (Beijing) Medical Technology secured USD20 million in Series C funding from such investors as KPCB China, WI Harper Group, Baird Capital Partners Asia and Mayo Clinic, of which the latter three companies also participated in the company's Series B financing of USD11 million in June 2011.

The report revolves around the followings:

- The access policy, industrial policy, international market environment and so forth of Chinese independent clinical laboratory industry;
- Status quo, competitive landscape, prospects and dynamics of Chinese independent clinical laboratory industry;
- The effects of the development of upstream diagnostic reagent and instrument, and downstream medical institutions on Chinese independent clinical laboratory industry;
- Operation, competitive advantages and prospects of 8 independent clinical laboratories including Kingmed Diagnostics, Zhejiang D.A. Diagnostics, ADICON Clinical Laboratories, Inc., DAAN Gene and Kindstar Global (Beijing) Medical Technology, etc.

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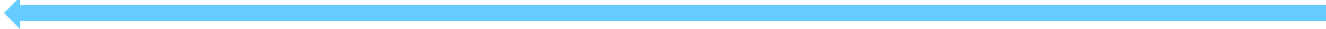
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