



China Diagnostic Reagent Industry Report, 2012-2014

Jan. 2013

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

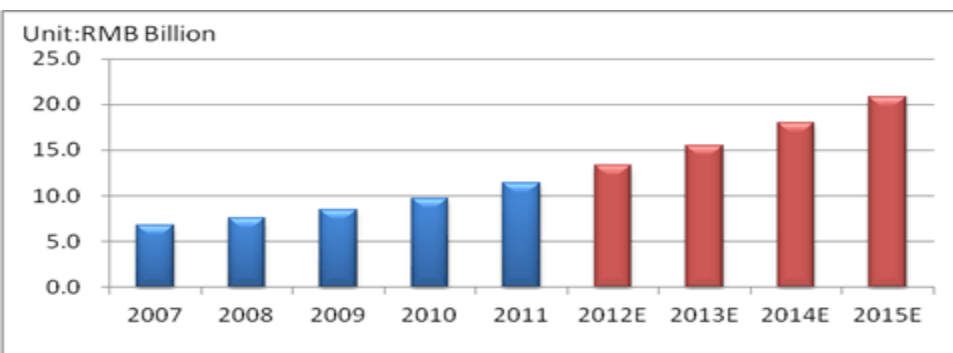
The primary information sources include the Ministry of Health of People's Republic of China, and National Bureau of Statistics of China etc.

Abstract

China's diagnostic reagent industry has formed a certain market scale and basis, and is marching from the introduction stage to the growth stage. With the continuous growth in China's medical care investment and per capita health care spending, the China's diagnostic reagent market has a promising prospect.

In vitro diagnostic reagents account for more than 90.0% of the output of China's diagnostic reagent industry. In 2011, the market scale of in vitro diagnostic reagents reached about RMB 11.4 billion in China, the industry will maintain a growth rate of 15%-20% in the future, and the market scale will hit RMB 20.8 billion in 2015.

Market Scale of In Vitro Diagnostic Reagent in China, 2007-2015



Source: ResearchInChina *China Diagnostic Reagent Industry Report, 2012-2014*

At present, there are only a few integrated in vitro diagnostic reagent enterprises with strong strength in China's diagnostic reagent market, including KHB and Fosun Pharma; other enterprises such as Da An Gene, BioSino, Leadman and Livzon have competitive advantages in specific fields such as biochemical diagnosis, immunodiagnosis, and molecular diagnosis. Meanwhile, China's in vitro diagnostic reagent industry concentration is low. Among 300-400 enterprises, there are only about 20 enterprises with annual sales of more than RMB 100 million. The enterprises are generally small and have a few product varieties. In 2011, KHB, Da An Gene, BioSino, Leadman only occupied 3.8%, 2.3%, 1.9%, 1.6% of the market respectively.

As a high-tech industry, the profitability of the overall Chinese diagnostic reagent industry is high. In 2011, among major Chinese diagnostic reagent enterprises, KHB, Da An Gene, BioSino, Kinghawk, Livzon, Leadman all achieved a gross margin of more than 50%; Fosun Pharma reached a gross margin of 40.4%, since diagnostic reagent and instrument business accounts for a lower proportion of its revenue. With the improvement of industry concentration, it's expected that the advantageous enterprises with strong capability of technological innovation and large production scale will obtain higher market share and profitability.

China Diagnostic Reagent Industry Report, 2012-2014 mainly includes the following contents:

- Market scale, market structure, import and export, competitive landscape, profitability, entry barriers of China's diagnostic reagent industry;
- Regulatory system and policy, industry policy, industrial chain, upstream and downstream of China's diagnostic reagent industry;
- Development forecast of China's diagnostic reagent industry, including the forecast of market scale, major market segments, industry competition, and enterprise development trends;
- Production, operation, investment, M&A, diagnostic reagent business and development prospect of 15 Chinese diagnostic reagent enterprises.

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