



China Dental 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 Company Reports, Ministry of Health of the People's Republic of China, and National Bureau of Statistics of China etc.

Abstract

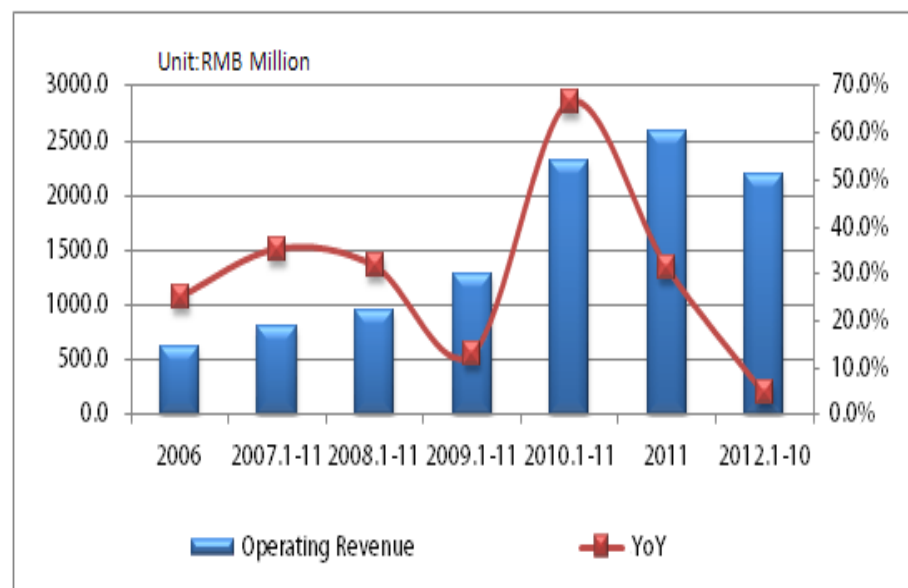
On the basis of dental care consumption, the dental industry is a medical industry chain integrating dental care service and the production and operation of dental care equipment and dental materials. From the perspectives of dentists per capita, dental visit rate and dental implant penetration, China's dental industry is at the infant stage. With the growing dental market size, especially the surge of high-end businesses such as dental implant, coupled with the consumption upgrading as well as relatively tolerant policy environment, China's dental industry is projected to maintain rapid growth trend.

In 2011, the dental equipment market scale of China surged by 31.6% year-on-year to RMB2589.9 million. At present, China lags far behind its developed counterparts in the dental equipment filed. Major homegrown industrial players include Northwest Medical Instrument, Runyes, Shinva Medical, Shanghai Fosun Pharmaceutical (Group), Meiya Optoelectronic Technology and Fujian Meisheng Medical Science & Technology. Since 2006, the dental equipment import value in China has seen big surge, with the CAGR more than 20%.

In the dental care market, the proportion of adult orthodontics in China has grown from 10%-20% ten years ago to 30% at present. In China, the penetration rate of dental implant is relatively low, with the market scale (including implant and dental crown operation businesses) approximating

RMB1.5-3 billion. Driven by the increasing awareness over dental health, the high valued-added businesses including orthodontics and dental implant will bring about the overall dental market maintaining a growth rate of 20%-30%. The estimation shows that the number of implanted teeth will soar up to 500,000 pieces in the upcoming five years from the current 100,000-odd pieces.

Operating Revenue and Growth Rate of China Dental Equipment Industry, 2006-2012



Source: NBS; ResearchInChina *China Dental Industry Report, 2012-2014*

Thanks to the buoyant advance of dentistry market, Chinese dental hospitals are expected to see vibrant development. In 2010, the revenue of Chinese dental hospitals totaled RMB5.22 billion, with the CAGR in 2006-2010 claiming 21.8% and the gross margin remaining at a high level of around 11.0% in 2008-2010. In particular, the gross margins generated by private dental hospitals were much higher. A case in point was Topchoice Medical Investment Corporation, the gross margin of which kept above 40.0% in 2008-2012.

➤ Operation, business performance, investment, M&As, dental equipment and materials business, dental care service and development outlook of seven major China-based dental equipment and materials enterprises as well as six major private dental hospitals.

The report highlights:

- Status quo, consumption, market scale and position in the international market of China dental industry;
- Market scale, asset size, profit level and competition pattern of China dental equipment industry;
- Status quo & prediction of China dental care market, development status quo and prospect of high value-added businesses including orthodontics and dental implant;
- Market scale, profit level, dentist resource, competition pattern and development trend of Chinese dental hospitals;

1. Overview of Dental Industry

- 1.1 Definition
- 1.2 Classification of Dental Equipment and Materials
- 1.3 Features of Dental Hospitals

2. Market Status Quo of China Dental Industry

- 2.1 Low Allocation of Dentists
- 2.2 High Morbidity of Dental Diseases and Low Dental Visit Rate
- 2.3 Late-started Professional Orthodontics
- 2.4 Fast Import Growth
- 2.5 Huge Development Potential of Dental Industry

3. Development Outlook of China Dental Equipment Industry

- 3.1 Overview
 - 3.1.1 Market Scale
 - 3.1.2 Asset Scale
- 3.2 Profit Level
- 3.3 Competition Pattern
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 - 3.3.2 Dental Disinfection & Sterilization Equipment
 - 3.3.3 Dental Implant & Repair Equipment
 - 3.3.4 Digital Dental Equipment

4. Development Prediction of China Dental Care Market

- 4.1 Orthodontics Market
- 4.2 Dental Implant Market

- 4.2.1 High-End Businesses like Dental Implant at the Infant Stage
- 4.2.2 Vibrant Growth of High Value-Added Businesses like Dental Implant
- 4.2.3 Huge High-End Consumer Group
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5. Development Outlook of China Dental Hospital Industry

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 - 5.2.2 Private Capital Flood Dental Hospitals
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 - 5.3.1 High-End Clinics will Integrate with Hospitals
 - 5.3.2 Dentist Resource will be Key to the Development of Enterprises
 - 5.3.3 Orthodontics and Implant Businesses will Become Development Highlights

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- Competitive Edge of Jia Mei Dental Clinic Group

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