



**China Ophthalmic Hospital Industry Report,
2012-2015**

May 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

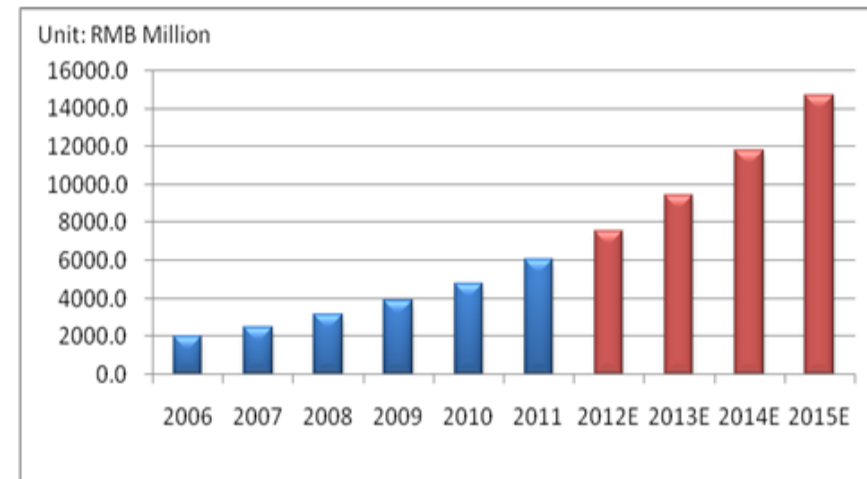
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

With the growing types of eye diseases and non-basic medical needs, China's ophthalmic hospital industry has seen rapid development. In 2011, the number of ophthalmic hospitals in China reached 288, with an AAGR of 7.1% during 2006-2011; industry revenue attained to RMB6.0515 billion, with a CAGR of 24.8% during 2006-2011. Following the rising demand, the total revenue of ophthalmic hospitals in future is still expected to grow at a rate of more than 20%.

Among Chinese specialized hospital market segments, ophthalmic hospital enjoys higher level of technology and profit, i.e. gross profit hit RMB892.4 million in 2011, with a compound growth rate of 49.1% in 2006-2011; gross margin was 14.7%, much higher than 3.8% of the hospital industry. Due to the uneven medical level as well as the quite different reception capabilities of eye care institutions, there are some differences in the level of profitability. China's largest eye institution - Aier Ophthalmology, for instance, reached gross margin of about 50.0% in 2008-2012, significantly higher than the industrial average.

Total Revenue of China Ophthalmic Hospital Industry, 2006-2015E



Source: Ministry of Health of P.R.C,

ResearchInChina China Ophthalmic Hospital Industry Report, 2012-2015

As there exists certain service radius, China's eye care service industry shows an obvious competition pattern of "national dispersion, regional concentration". With respect to the current market share, Eye & ENT Hospital of Fudan University, Zhongshan Ophthalmic Center of Sun Yat-sen University and other public ophthalmic hospitals hold greater market shares locally; private hospitals such as Aier Ophthalmology and Bright Eye Hospital are rapidly expanding the chain of eye care services, accompanied by an increasing market share on a national scale.

China Ophthalmic Hospital Industry Report, 2012-2015 mainly covers the followings:

Overview of ophthalmic hospital market in China, including changes in number, operation, current medical services, competition pattern, etc. of ophthalmic hospitals;

Environment for the development of ophthalmic hospitals in China, involving regulatory system, industry policies, related policies that encourage the entry of private capital, upstream & downstream industry and impact, etc.;

China ophthalmic hospital industry growth forecast, including the influence of Taiwan's "Seal Knife Gate" on the industry, ophthalmic medical institution market size forecast, investment opportunities and risks for private ophthalmic hospitals, etc.;

Operation, investment, merger & acquisition, development forecast concerning three major private hospitals, two Sino-foreign hospitals and six public hospitals in China.

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- 1.3 Industry Characteristics

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