China Independent Clinical Laboratory Industry Report,2013-2015

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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

Restricted by the health care system and the medical inspection level (Chinese firms mainly lag behind foreign counterparts in molecular diagnostics and other special tests), Chinese independent clinical laboratory market only values RMB2.5-3 billion, equivalent to 2%-3% of the total revenue of medical diagnosis, much lower than 30% in developed countries.

However, in the context of Chinese medical reform, the cost control of public hospitals, the increasing number of patients that primary medical institutions are confronted with, the rapid development of private hospitals and other factors will greatly boost China independent clinical laboratory industry which will grow at a rate over 40%.

The report focuses on the operation, advantages and characteristics of 10 major independent clinical laboratory companies in China on the basis of an analysis on the development environment, the market situation, the competition pattern, the impact of upstream and downstream as well as the prospect of China independent clinical laboratory industry.

In China, among about 110 laboratories engaged in independent medical diagnosis, top four ones, namely Kingmed Diagnostics, ADICON, DiAn Diagnostics and DaAn Health, master more than 70% domestic market share together, all with the chain integrated diagnostic service mode.

As a giant in China independent clinical laboratory industry, Kingmed Diagnostics has maintained a revenue growth rate of more than 50% in the past five years. It achieved the revenue of over RMB1 billion in 2012 with 21 laboratories, over 13,000 clients (including more than 1,000 Grade-A hospitals) and 1,600 types of inspection services. Moreover, the company has received two rounds of capital injection from Lenovo, and always stood at the leading position of the industry.

ADICON and DiAn Diagnostics are located in the second echelon in the industry.

ADICON targets at the high-end field (including 220 special inspection items), with 15 laboratories, only second to Kingmed Diagnostics. In June 2012, the subsidiary Hefei ADICON became a designated cervical and breast cancer diagnosis institution in Hefei by virtue of the strong and efficient diagnostic service network.

China's first listed independent clinical laboratory enterprise DiAn Diagnostics gained the revenue of RMB414 million from independent medical diagnostic services in 2012, up 52.2% year on year. DiAn Diagnostics shows significant unique competitive advantages, reflected in hierarchical management and "agency + services" business model. As of the end of 2012, DiAn Diagnostics owned 13 independent diagnostic laboratories, and planned to establish 15 Class-A laboratories and 30 Class-B ones by 2016 for the purpose of the overall improvement in the service response speed.

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