



China Orthopedic Instrument Industry Report, 2013-2015

Sep. 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.

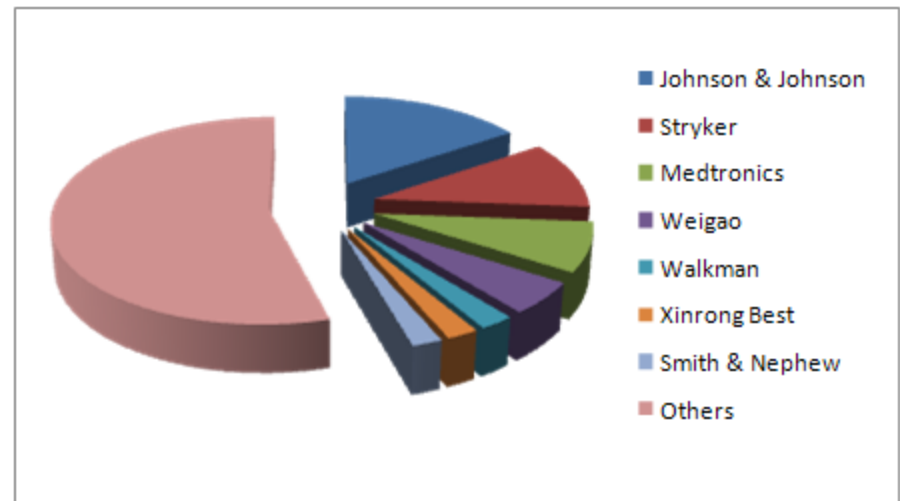
Abstract

Benefiting from aging of population, consumption upgrade and policy support, China's orthopedic instrument industry has seen rapid development over the years, with total market size rising from 3.28 billion yuan in 2006 to 9.85 billion yuan in 2012.

Trauma products, spine products and joint products constitute the three major market segments of Chinese orthopedic instrument industry. In 2012, the three principal products accounted for an aggregate market share of about 82.2%, of which, trauma products showed the highest, approximately 35.5%, with market size up 18.24% YoY; spine and joint products ranked second (up 12.6% YoY) and third (up 12.4% YoY), respectively.

In recent years, along with the increasing investment of foreign-funded enterprises in China, the trend of foreign monopoly has been more evident. After the acquisition of Synthes in 2012, Johnson & Johnson has turned into the largest company in China's orthopedic instrument market, with market share of both trauma and spine products occupying the first place.

Market Share of Major Orthopedic Trauma Instrument Enterprises in China, 2012



Source: ResearchInChina China Orthopedic Instrument Industry Report, 2013-2015

In November 2012, Medtronic purchased KangHui Medical for \$816 million, thus making an important step in Chinese orthopedic instrument market localization. Compared with Medtronic's high-end positioning, affordable KangHui products can help Medtronic expand low- and medium-end markets in emerging countries and regions (including China). In 2012, Medtronic (including KangHui Medical) occupied 15.9% of China's spine market.

Stryker is a world-renowned orthopedic instrument enterprise, and its joint products account for about 20% of global market share. In January 2013, Stryker acquired Trauson Holdings for \$764 million, and in virtue of the latter's R&D and manufacturing capacity and distribution network advantages further expanded its market share in China, expected to occupy 8%-10% of China's orthopedic market in 2013.

Relying on powerful R&D strength and mature distribution network, Weigao has already become the largest local supplier of orthopedic devices in China. In 2012, its orthopedic device business achieved revenue of 223 million yuan, and trauma equipment products occupied market share of 5.1% or so.

In future, the Chinese orthopedic instrument market will encounter more fierce competition, in which small companies due to low R&D level, insufficient production capacity and non-standard quality control tend to be gradually eliminated, and the market will be further concentrated in industry magnates with superb financial and technical strength.

China Orthopedic Instrument Industry Report, 2013-2015 of ResearchInChina mainly covers the followings:

- Overview, market structure and development prospect, etc. of global orthopedic instrument industry;
- Market structure, competition pattern, barriers to entry, import & export, etc. of China orthopedic instrument industry;
- Development environment (including policy environment, development prospects as well as development of upstream and downstream industries) for China orthopedic instrument industry;
- Operating conditions, etc. of 12 orthopedic instrument companies (including Johnson & Johnson, Medtronic, Stryker, Weigao, Shanghai Kinetic, Beijing AKEC Medical, United Orthopedic Corporation, etc.) in China.

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