



**China Diagnostic Reagent Industry Report,
2013-2015**

Nov. 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.

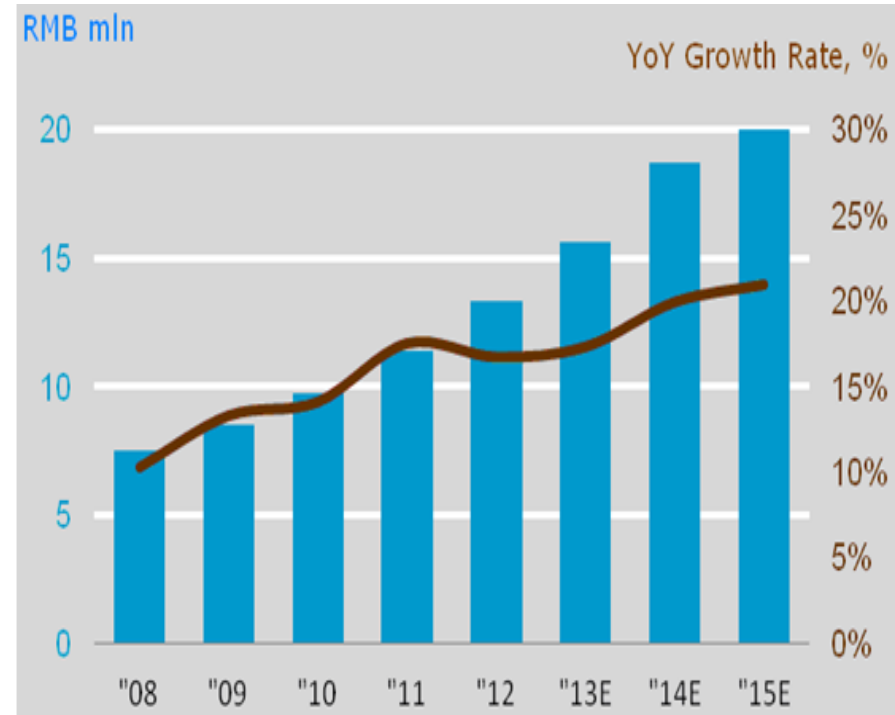
Abstract

Driven by huge population base, intensified aging and many favorable policies, China diagnostic reagent industry has been developing rapidly. In 2008-2012, the diagnostic reagent market size presented the CAGR of over 15%, hitting RMB13.3 billion with the year-on-year growth rate of 16.7% in 2012. Moreover, the market will accelerate its pace in the wake of China's medical reform, enhanced health awareness of people and improved physical examination technology.

In China, in vitro diagnostic reagents consist of biochemical diagnostic reagents, immune diagnostic reagents, molecular diagnostic reagents and hematology diagnostic reagents. Biochemical and immune diagnostic reagents enjoyed the highest 70% market share together in 2012, which was determined by the domestic medical demand. Chinese economy and the government medical expenditure stay at a low level, which affects the medical diagnosis consumption seriously.

From now to the next three years, China will desire regular tests mostly, which have the most demand for biochemical and immune diagnostic reagents. The progress in Chinese diagnosis technology and the increase of high-end consumers will boost the demand for molecular diagnostic reagents and other related reagents. The demand for biochemical and immune diagnostic reagents will occupy 60% in 2015.

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Source: ResearchInChina China Diagnostic Reagent Industry Report, 2013-2015

By virtue of high performance-price ratio and local advantages, Chinese diagnostic reagent enterprises have broken through the monopolization of foreign brands. However, foreign companies still seize 30-40% market share in China with the technical advantages in medium- and high-end fields as well as the monopoly on “instrument + reagent” integrated platforms.

In China, there are 300-400 diagnostic reagent enterprises, including the leaders KHB, Da An Gene, Sinocare and Leadman, but their market share was still as low as 3.4%, 2.4%, 2.1% and 2.0% respectively in 2012.

The report mainly includes the followings:

- ✘ Status quo, market segments, import and export, competition pattern and profitability of Chinese diagnostic reagent market;
- ✘ Development trends of Chinese diagnostic reagent in terms of policies (including medical reform), population structure and detection technology;
- ✘ Operation, diagnostic reagent business and prospect of 11 companies, such as KHB, Da An Gene, Sinocare, Leadman, BioSino Bio-technology and Science.

1 Overview of Diagnostic Reagent Industry

- 1.1 Definition
- 1.2 Classification
- 1.3 Industry Chain

2 Status Quo of China Diagnostic Reagent Industry

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