



China Dental Industry Report, 2013-2016

Jan. 2014

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.

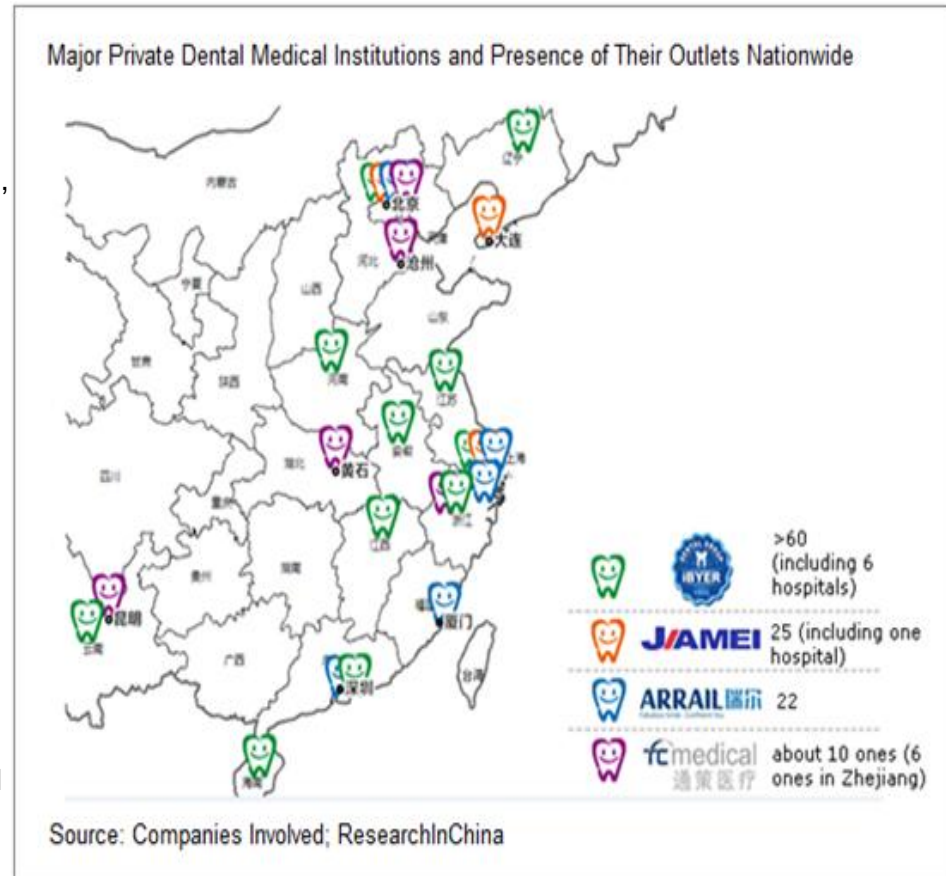
INFORMATION SOURCES

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

Abstract

The dental industry refers to medical industrial chain on the basis of oral medical consumption, consisting mainly of dental appliances (equipments and consumables), dental medical services, etc. with the synergy of deepening implementation of new medical reform, growing per capita disposable income and raising public awareness over health, China dental industry has witnessed robust development in recent years.

Dental Appliance: in 2012, the revenue of China dental equipment industry increased by 6.7% year-on-year to RMB2.7625 billion; in Jan.-Oct., 2013, it reported the revenue of RMB4.2094 billion, up 92.9% year-on-year. Domestic industrial players, including Xianyang Northwest Medical Instrument (Group), Runyes, Shinva Medical Instrument, Shanghai Fosun Pharmaceutical (Group), Hefei Meiya Optoelectronic Technology, and Fujian Meisheng Medical Science & Technology, are increasingly sharpening their competitiveness. Xiya Optoelectronic Technology, for example, unveiled its CBCT in 2012, dismantling monopoly of foreign brands such as Carestream from US, Kavo and Sirona from Germany, New Tom from Italy, Planmeca from Finland, Vatech from South Korea, and Morita from Japan. In 2012 and H12013, the sales of the company from CBCT hit RMB1.15 million and RMB5.53 million, respectively, with a tendency to replace imported brands.



Dental Medical Service: in 2006-2011, the total revenue of China's stomatological hospitals soared from RMB2.37 billion to RMB6.5 billion, with the CAGR of 22.4%. By gross margin, stomatological hospitals have been ranked top three among specialized hospitals of all kind for many consecutive years, with the number in 2011 reaching 11.8%. In consideration of the fact that the revenue generated by stomatological hospitals is excluded from that generated by the department of stomatology of general hospitals which number around 18,000, and that private clinics such as Arrail Dental and iByer Dental Group are more active in marketing, the overall oral medical industry performs better than the above data in terms of industrial scale, growth rate and gross margin.

Thanks to a series of proactive policies and robust demand, China has fostered nationwide oral medical service institutions represented by TC Medical, Arrail Dental, iByer Dental Group, and Jia Mei Dental which can be most founded in economically developed regions such as Beijing, Shanghai, Jiangsu, Zhejiang and Guangdong, as well as flagship chain brands represented by Yafei Dental, Ai Kang Jian Dental, Changsha Haoyayi, and Dalian MEIER DENTAL. In comparison with developed countries, however, China dental market is in a fledging stage. The number of dentists for per 1 million Chinese population records only around 100, far below the level of developed or moderately developed countries which number between 500 and 1,000. In China, the morbidity of dentognathic deformity reaches 30-50%, but the rate of formal treatment is only 10-15%; in China, the number of dental implant is less than 200,000 teeth, as opposed to the number of nearly 1 million in South Korea. Thus, the dental implant business is expected to remain a primary business that drives the development of China oral market with the targeted growth rate at more than 30% to over 540,000 by 2016.

The report highlights:

- Market Scale, Import & Export, Competition Pattern, and Development Outlook of China Dental Equipment & Material Market;
- Status Quo, Competition Pattern, and Development Trend of China Dental Medical Service Market;
- Current Development, Oral Business and Development Prospect of 7 Chinese Dental Equipment Manufacturers and 6 Private Dental Medical Service Firms.

1. Overview of Dental Industry

- 1.1 Definition
- 1.2 Classification of Dental Devices & Materials
- 1.3 Characteristics of Stomatological Hospitals

2. Status Quo of China Dental Industry

- 2.1 A Small Number of Chinese People Have Personal Dentists
- 2.2 High Morbidity, but Low Rate of Outpatient Visits
- 2.3 Late Start of Professional Orthodontics
- 2.4 Active Import & Export Trade
 - 2.4.1 Import
 - 2.4.2 Export
- 2.5 Huge Development Potential

3. Development Prospect of China Dental Equipment Industry

- 3.1 General Overview
 - 3.1.1 Market Size
 - 3.1.2 Scale of Assets
- 3.2 Profit Level
- 3.3 Competition Pattern
 - 3.3.1 Dentistry Treatment Equipments
 - 3.3.2 Dental Disinfection & Sterilization Equipments
 - 3.3.3 Dental Implant and Repair Equipments
 - 3.3.4 Digitalized Dental Equipments

4 Development Outlook of China Dental Medical Market

- 4.1 Orthodontics Market
- 4.2 Dental Implant Market
 - 4.2.1 Dental Implant and Other High-End Businesses in a Fledging Stage
 - 4.2.2 Dental Implant and Other High Value-added Businesses Grow Rapidly
 - 4.2.3 Massive High-End Consumer Group
- 4.3 Market Prediction

5. Development Prediction of China Stomatological Hospitals

- 5.1 General Overview
 - 5.1.1 Number of Hospitals
 - 5.1.2 Market Size
 - 5.1.3 Industrial Profit
 - 5.1.4 Number of Physicians
- 5.2 Competition Pattern
 - 5.2.1 Most Large-sized Stomatological Hospitals are State-Run Ones
 - 5.2.2 Private Capital Rushing into Stomatological Hospitals
- 5.3 Development Trend
 - 5.3.1 High-end Clinics Integrating with Hospitals
 - 5.3.2 Physicians Sources being Crucial to the Development of Enterprises
 - 5.3.3 Orthodontics and Implant Businesses are Priorities for Further Development
 - 5.3.4 Dentistry (Oral) Insurance Helps to Facilitate the Growth of Oral Medical Industry

6. Leading Dental Equipment and Materials Enterprises in China

- 6.1 Shinva Medical Instrument
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Revenue Structure
 - 6.1.4 Gross Margin
 - 6.1.5 Investment
 - 6.1.6 Dental Equipment Business
 - 6.1.7 Development Outlook
- 6.2 Hefei Meiya Optoelectronic Technology
- 6.3 Shanghai Fosun Pharmaceutical (Group)
- 6.4 Weigao Holding (WeGo)
- 6.5 Xianyang Northwest Medical Instrument (Group)
- 6.6 Runyes
- 6.7 Fujian Meisheng Medical Science & Technology


7. Major Private Stomatological Hospitals in China

- 7.1 TC Medical
- 7.2 Arrail Dental
- 7.3 iByer Dental Group
- 7.4 Jia Mei Dental
- 7.5 YaFei Dental
- 7.6 Ai Kang Jian Dental

- Classification and Major Products of Dental Equipments
- Classification and Major Products of Dental Materials
- Number of Dentists Per 1 Million People Worldwide and Average Age of the Population (by Country or Region), 2011
- Dental Caries Rate and Untreated Rate in China by Age Bracket, 2008
- Dental Caries Rate, Average Anodontia Rate, and the Repair Rate of False Tooth in China Aged 35-44 and 65-74, 2008
- Dentognathic Deformity Rate and Formal Treatment Rate for Teenagers in Changsha by Age, 2011
- Import Volume and Import Value of Chairs Equipped with Dental Equipments in China, 2009-2013
- Import Volume and Import Value of Dental Drills in China, 2009-2013
- Import Volume and Import Value of Dental X-ray Machines in China, 2009-2013
- Import Volume and Import Value of Artificial Teeth in China, 2009-2013
- Import Volume and Import Value of Tooth Fixing Pieces in China, 2009-2013
- Import Volume and Import Value of Dental Floss in China, 2009-2013
- Import Volume and Import Value of Dental Cements in China, 2009-2013
- Import Volume and Import Value of Dental Waxes, Molding Pastes and Other Hydrated Lime Products for Dental Use in China, 2010-2013
- Export Volume and Export Value of Chairs Equipped with Dental Equipments in China, 2009-2013
- Export Volume and Export Value of Dental Drills in China, 2009-2013
- Export Volume and Export Value of Dental X-ray Machines in China, 2009-2013
- Export Volume and Export Value of Artificial Teeth in China, 2009-2013
- Export Volume and Export Value of Tooth Fixing Pieces in China, 2009-2013
- Export Volume and Export Value of Dental Floss in China, 2009-2013
- Export Volume and Export Value of Dental Cements in China, 2009-2013
- Export Volume and Export Value of Dental Waxes, Molding Pastes and Other Hydrated Lime Products for Dental Use in China, 2010-2013
- Oral Market: Hangzhou (China) vs. Singapore
- Operating Revenue and Total Profit of China Medical Device Industry, 2008-2013
- Operating Revenue and Growth Rate of China Dental Equipment Industry, 2008-2013

- Total Assets and Growth Rate of China Dental Equipment Industry, 2008-2013
- Asset-Liability Ratio of China Dental Equipment Industry, 2008-2013
- Total Profit and Growth of China Dental Equipment Industry, 2008-2013
- Gross Margin of China Dental Equipment Industry by Quarter, 2008-2013
- Import & Export Volume and Average Price of Chairs Equipped with Dental Equipments in China, 2009-2013
- CBCT Sales in China, 2010-2012
- Major CBCT Producers in China
- Number of Dental Implant Per 10,000 Chinese People by Country, 2012
- Global Dental Implant Market Structure by Region, 2011
- Number of Dental Implant by Each Dentist Worldwide by Country, 2011
- Revenue and Growth Rate of Osstem in China, 2006-2010
- Disposable Income Level and Penetration Rate of Dental Implant in Major Countries
- Number and Growth Rate of Dental Implant in China, 2006-2016E
- Number of Stomatological Hospitals in China, 2006-2011
- Revenue and Growth Rate of Stomatological Hospitals in China, 2006-2011
- Gross Profit and Gross Margin of Stomatological Hospitals in China, 2006-2011
- Gross Margin of Specialized Hospitals of all Varieties in China, 2010-2011
- Number of Medical Staff of Stomatological Hospitals in China, 2010-2011
- Number of Dentists Trained by OSSTEM in China, 2006-2010
- Major Cases on the Chinese Dentist Education Promotion, 2006-2011
- Number of Public and Non-Public Stomatological Hospitals in China, 2006-2011
- Major Private Dental Medical Institutions in China, Number of Outlets and Distribution, 2013
- Prices of Some Dental Diagnosis and Treatment Items in China, 2012-2013
- Revenue and Net Income of Shinva Medical Instrument, 2008-2013
- Revenue of Shinva Medical Instrument by Product, 2008-2013

- Revenue of Shinva Medical Instrument by Product, 2008-2013
- Operating Revenue Structure of Shinva Medical Instrument by Region, 2008-2013
- Gross Margin of Shinva Medical Instrument by Product, 2008-2012
- Projects Invested by Shinva Medical Instrument and Investment Scheduling, as of Jun.2013
- Revenue and Net Income of Shinva Medical Instrument, 2012-2016E
- Major Products of Hefei Meiya Optoelectronic Technology and Market Occupancy
- Revenue and Net Income of Hefei Meiya Optoelectronic Technology, 2008-2013
- Revenue of Hefei Meiya Optoelectronic Technology by Product, 2009-2011
- Operating Revenue Structure of Hefei Meiya Optoelectronic Technology by Region, 2009-2011
- Gross Margin of Hefei Meiya Optoelectronic Technology by Product, 2008-2013
- Hefei Meiya Optoelectronic Technology's Revenue from Top Five Clients and % of Total Revenue, 2008-2013
- Hefei Meiya Optoelectronic Technology's Procurement from Top Five Suppliers and % of Total Procurement, 2009-2012
- Revenue and Net Income of Hefei Meiya Optoelectronic Technology, 2011-2014
- Major Dental Equipments and Materials of Shanghai Fosun Pharmaceutical (Group)
- Products and Varieties of Products of Weigao Holding (WeGo)
- Revenue and Total Profit of Xianyang Northwest Medical Instrument (Group), 2007-2009
- Gross Margin of Xianyang Northwest Medical Instrument (Group), 2007-2009
- Total Assets and Total Liabilities of Xianyang Northwest Medical Instrument (Group), 2007-2009
- Revenue and Total Profit of Runyes, 2007-2009
- Gross Margin of Runyes, 2007-2009
- Total Assets and Total Liabilities of Runyes, 2007-2009
- Revenue and Total Profit of Fujian Meisheng Medical Science & Technology, 2007-2009
- Gross Margin of Fujian Meisheng Medical Science & Technology, 2007-2009
- Total Assets and Total Liabilities of Fujian Meisheng Medical Science & Technology, 2007-2009
- Revenue and Net Income of TC Medical, 2008-2013

- 
- Revenue of TC Medical by Product, 2008-2012
 - Revenue of TC Medical by Region, 2008-2012
 - Gross Margin of TC Medical by Region, 2008-2012
 - Client Orientation of TC Medical
 - Revenue and Net Income of TC Medical, 2012
 - Revenue and Net Income of TC Medical, 2011-2014
 - Distribution of Clinics under Arrail Dental, as of Dec.2013
 - Competition Edge of Arrail Dental
 - Distribution of Clinics under Jia Mei Dental
 - Competitiveness Edge of Jia Mei Dental
 - Distribution of Clinics under Ai Kang Jian Dental

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