

China Diagnostic Reagent Industry Report, 2013-2016

July 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

With the accelerated aging of the Chinese population, the increase of personal health expenditure as well as the improved medical care facilities and government health care system, China diagnostic reagent industry has been developing quickly, especially in vitro diagnostic reagents occupy over 90%. In 2013, Chinese in vitro diagnostics market size reached RMB22.98 billion, of which RMB16.61 billion came from in vitro diagnostic reagents.

Chinese in vitro diagnostic reagent market consists of biochemical diagnostic reagents, immunodiagnostic reagents and molecular diagnostic reagents. Among them, the immune reagents and biochemical reagents account for a relatively higher combined proportion, such as around 65% in 2013.

Currently, about 40%-50% share of the Chinese in vitro diagnostics market has been dominated by foreign companies represented by Roche, Siemens, Abbott and Johnson & Johnson. Although there are 300-400 local enterprises in China in vitro diagnostics industry, the top ten Chinese companies which rank by production scale only seize 30% market share, reflecting a low industry concentration degree.

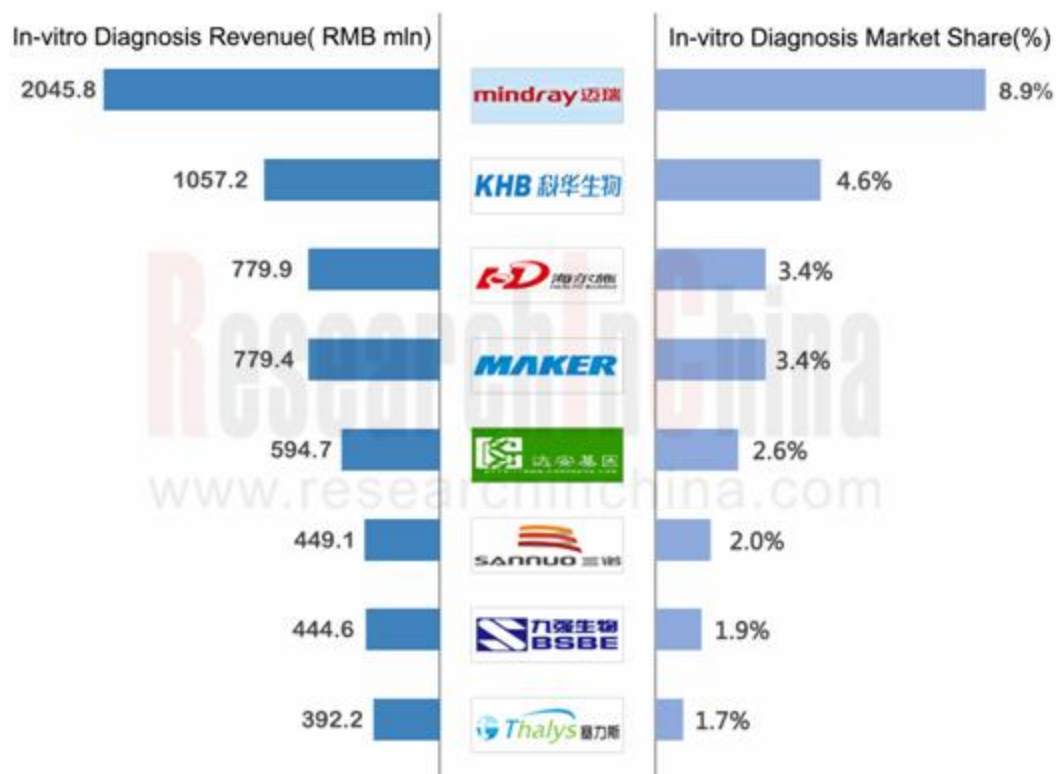
Mindray Medical, KHB, Fosun Pharmaceutical, Maker Biotechnology and Da An Gene act as giants in China in vitro diagnostics industry. Especially, Mindray Medical and KHB achieved the respective in vitro diagnostics revenue of RMB2.0458 billion and RMB1.0572 billion in 2013, accounting for 13.5% of the total jointly.

In 2014, a number of local Chinese diagnostic reagent companies (including BSBE, Maker Biotechnology, Health BioMed, Wondfo, Thalys) intend to step in the capital market through IPO because they are optimistic about the prospects of the diagnostic reagent industry; the raised funds will be used in the expansion of the existing projects or the construction of new projects. SHINVA, Humanwell Healthcare and Zhongyuan Union Stem Cell Bioengineering have entered the diagnostic reagent industry through acquisitions.

The report covers the following:

- Status quo of China diagnostic reagent industry, including overview, market structure, import, export, competition pattern and so on;
- Development environments and trends of China diagnostic reagent industry, embracing macroeconomy, medical situation, and relevant policies;
- Operation and diagnostic reagent business of 17 major companies in China diagnostic reagent industry.

In-vitro Diagnosis Revenue and Market Share of Major Diagnostic Reagent Enterprises in China, 2013



Source: China Diagnostic Reagent Industry Report, 2013-2016, by ResearchInChina

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