

China Orthopedic Instrument Industry Report, 2014-2017

Aug. 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

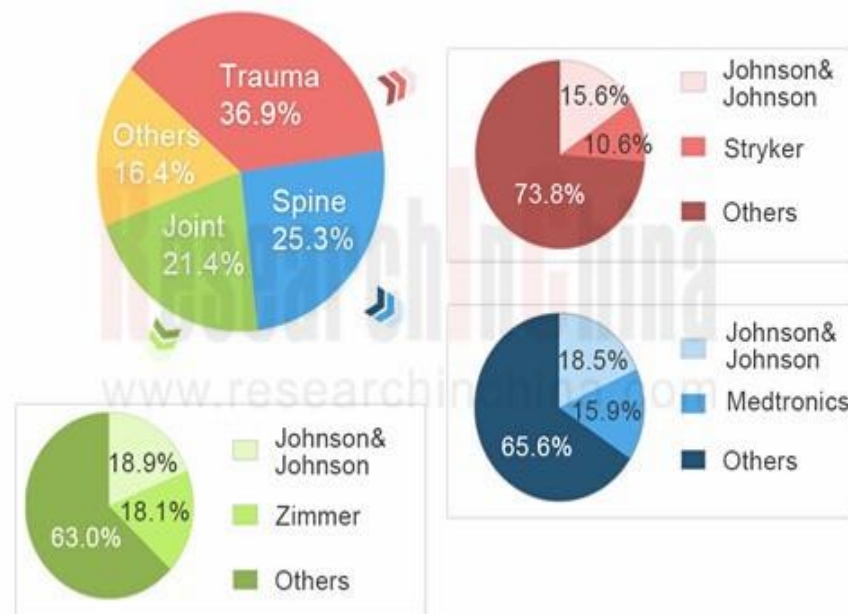
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Benefiting from accelerated aging population and rising proportion of reimbursement for medical expenses, the Chinese orthopedic instrument market demand has been effectively released, with its scale presenting a CAGR of 19.2% during 2009-2013. Trauma products, spine products and joint products are three product segments of orthopedic instruments in China, of which trauma products holding the bulk with 36.9% market share in 2013.

Being optimistic about bright future of China orthopedic instrument industry, some foreign and domestic companies are speeding up their layout in orthopedic instrument market through mergers and acquisitions. In 2012, Medtronic, Inc. acquired the most competitive orthopedic device maker in China-- China Kanghui Holdings for USD 816 million; In Jan. 2013, Stryker Corporation bought China's largest trauma product makers-- Trauson Holdings Company Limited for HKD5.9 billion; In Sep. 2011, MicroPort Scientific Corporation entered orthopedic instrument market by purchasing Suzhou Best at transaction value of RMB 110 million, and acquired Wright's OrthoRecon business at USD 290 million in Jan. 2014.

Product Structure of China Orthopedic Instrument Industry and Main Enterprises, 2013



Source: China Orthopedic Instrument Industry Report, 2014-2017, ResearchInChina

The Chinese orthopedic instrument market now is dominated by Johnson & Johnson, Zimmer, Medtronic, Stryker and other foreign companies, together holding 40%-50% market share. However, local Chinese companies like Shandong Weigao Group Medical Polymer Co. Limited, Shanghai Kinetic Medical Co., Ltd. and United Orthopedic Corporation have made some progress in R&D and production technology in recent years, and grabbed some marker share by virtue of advantages in cost and channel.

Shandong Weigao Group Medical Polymer has become the largest local orthopedics company in China with a market share of 4.3%; Shanghai Kinetic Medical is a leader in vertebroplasty interventional operation system, occupying about 50% of the Chinese percutaneous kyphoplasty (PKP) market; United Orthopedic Corporation is a champion in artificial knee/hip joint with 4%-6% market share in China.

China Orthopedic Instrument Industry Report, 2014-2017 focuses on the following:

- ⇒Development of the Chinese orthopedic instrument market, including market size, market structure, import & export, competitive landscape, barriers to entry and sales model;
- ⇒Development environment of the Chinese orthopedic instrument market, covering global market environment, policy environment, macro environment, upstream and downstream sectors and development prospects;
- ⇒Operation and orthopedic instrument business of 4 foreign and 14 local Chinese orthopedics companies.

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