China Interventional Cardiovascular Device Industry Report,2014-2017

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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.

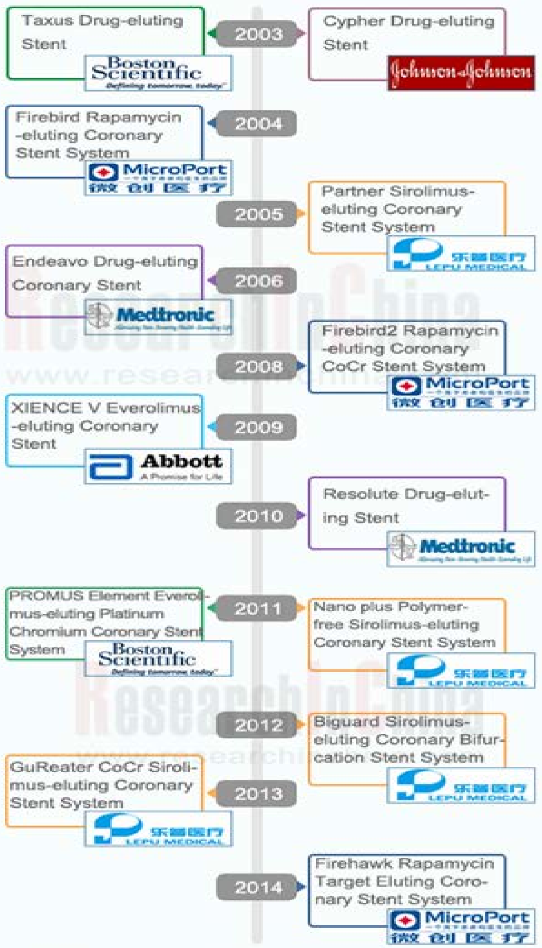
Abstract

The prevalence of cardiovascular disease in China impacted by accelerated aging of population and changes in consumption concept, dietary habit, way of working and other lifestyles has been growing year after year, thereby promoting the development of domestic percutaneous coronary intervention (PCI) market. PCI cases in China totaled 454,505 in 2013, up 16.9% from a year earlier; meanwhile the interventional cardiovascular device industry there was worth RMB20.12 billion.

At present, half of the Chinese interventional cardiovascular device industry is dominated by domestic companies led by MicroPort, Lepu Medical, Lifetech Scientific, and Dalian Yinyi. In 2013, 53.4% of the Chinese market was controlled by domestic companies, 31.2% by foreign counterparts represented by Johnson & Johnson, Medtronic, Boston Scientific, Abbott, B. Braun and Terumo, and 15.4% by those invested by Hong Kong, Macao and Taiwan.

Interventional cardiovascular devices in China include cardiovascular stent, catheter, guidewire, balloon, surgical auxiliary devices, etc., among which cardiovascular stent is predominant.

Release Time of Main Drug-eluting Stents in China, 2003-2014



Source:China Interventional Cardiovascular Device Industry Report, 2014-2017 by ResearchInChina

Cardiovascular stent: In 2013, the Chinese cardiovascular stent market equaled RMB11.2 billion, 78.8% of which was occupied by domestic drug-eluting stents. That same year, 686,000 units of cardiovascular stent were consumed in China, up 11.7% year on year, and drug-eluting stents accounted for 99.5%, indicating that the drug-eluting stent is gradually becoming an important device for interventional cardiovascular therapy.

In addition, Abbott has developed biodegradable stents, which are sold in Europe; Lepu Medical is endeavoring to develop biodegradable stents, which are expected to be available on the market in 2017. Thanks to its excellent performance, biodegradable stents are likely to replace drug-eluting stents gradually in the future, thus becoming the main variety in domestic coronary stent market.

Balloon catheter: In 2013, China's demand for PTCA balloon catheter amounted to 1.186 million units, 500,000 of which were PTCA balloon catheters for dilatation. With rapid development of local PTCA balloon catheter producers represented by Lepu Medical, MicroPort and JW Medical, domestic PTCA balloon catheters increased its market share from 20% in 2009 to 40% in 2013.

Affected by the implementation of “Regulations on the Centralized Procurement of High-value Medical Consumables”, purchase price of interventional cardiovascular devices will continue to decline, further squeezing profit margins of relevant companies. However, the substantial decline in prices will enable more patients to receive PCI, thus helping the industry maintain a fairly rapid growth rate. It is expected that the Chinese interventional cardiovascular device market will worth RMB41.2 billion by 2017.

China Interventional Cardiovascular Device Industry Report, 2014-2017 focuses on the following:

- Status quo of China interventional cardiovascular device industry, including overview, market demand, import & export, competitive landscape and entry barriers;
- Development environment of China interventional cardiovascular device industry, embracing macro environment, policy climate and upstream & downstream sectors;
- Status quo, competitive landscape, etc. of China interventional cardiovascular device market segments, covering coronary stent, balloon catheter, catheter, guidewire, sheath group and auxiliary devices;
- Operation, interventional cardiovascular device business, etc. of 6 foreign and 12 Chinese interventional cardiovascular device companies.

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