China Medical Monitor 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.

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Abstract

With advancement of medical reform, improvement of spending power, and enhancement of health care consciousness, China's medical monitor industry is gradually expanding. During 2007-2013, the market size grew at a CAGR of 21.5%, to RMB4.69 billion in 2013. However, the medical monitor penetration in China was still at a relatively lower level, at 26.5% in 2013, far below the US level of 80%, reflecting great development potential. It is projected that by 2017 the market size of medical monitor industry in China will exceed RMB10 billion.

At present, most medical monitor enterprises in China are still very small and have weak R&D capabilities, and the market is dominated by Mindray, Philips, and GE, which occupy a combined share of roughly 80% in China medical monitor market. Moreover, Philips and GE enjoy absolute superiority in Chinese market of medium and high-end monitors. But under the backdrop of medical reform in China, foreign companies are also expanding their presence in medium and low-end market. For example, GE planned to raise the proportion of medium and high-end monitors and low-end ones in China 50%:50% by 2015.

As a leader in China's medical monitor industry, Mindray took a 37% market share at home in 2013. Currently, the company is stepping up the expansion in China's high-end monitor market. Compared with medical imaging system and in-vitro Diagnostics, however, Mindray's revenue from monitoring products showed a slowdwon in growth rate, with the revenue proportion falling from 44% in 2009 to 36% in the first three quarters of 2014.

Biolight and EDAN Instruments have long been among the second echelon of medical monitor market in China, each with market share of less than 5%. Because of the increasingly intense competition in monitor market and difficulty in surpassing such monitor giants as Mindray, Philips, and GE, the second-echelon enterprises are accelerating the differentiated product layout. And Biolight, hoping to consolidate the medical monitoring product line, continuously improved the hematodialysis layout through M&A, and has completed the layout of the wearable products integrating smartness and mobile health care. In comparison, EDAN Instruments aggressively developed color Doppler ultrasound and POCT businesses, and has successively established 2 related subsidiaries in the United States.

China Medical Monitor Industry Report, 2014-2017 is primarily concerned with the following:

- Development, market size, competitive landscape, import & export, development prediction of medical monitor industry in China;
- Regulatory policy, industry policy, access barrier of medical monitors in China and the impact from upstream and downstream sectors, etc.;
- Operation and medical monitor business of 4 global and 6 major Chinese monitor manufacturers, etc..

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