



**China Medical Robot Industry Report,
2014-2018**

Oct. 2015

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

Medical robots can be applied to surgeries, rescue, transport, nursing and rehabilitation of the sick and wounded. Wherein, surgery and rehabilitation robots are two striking market segments.

Due to the relatively low technical barriers, numerous companies such as Ekso Bionics (the United States), ReWalk (Israel), Robotics (New Zealand), Rex Bionics (New Zealand) and Cyberdyne (Japan) have got into the field of rehabilitation robots. However, the global surgical robot market is mainly occupied by the US-based Intuitive Surgical, who had sold out 3,266 Da Vinci surgical robots by the end of 2014. Thanks to high technical barriers, high costs, supporting supplies, training of doctors and other factors, Da Vinci surgical robots featured with preemptive advantages will still master the absolute leadership in the long run.

Although China did not start research on medical robots late, it is backward in terms of the development, and is currently dependent on imported surgical robots. By the end of 2014, 24 Chinese hospitals had imported 29 surgeries robots which accomplished 11,651 surgeries cumulatively (5,116 in 2014). In accordance with examination and approval of National Health and Family Planning Commission of China, China will import a total of at least 54 surgical robots which are expected to complete 20,000 surgeries by the end of 2015.

However, China has also made some progress in local surgical robots. For example, the minimally invasive surgical robot system "Smart S" developed by Tianjin University and Smart Robot Technology Group jointly has entered clinical stages; HIT Robot Institute (affiliated companies: Boshi Automation and Harbin Sizherui) expects to apply for testing of its minimally invasive celiac surgical robot system in the form of product testing at the end of 2015, and apply for registration at the end of 2017. Therefore, commercial local surgical robots may emerge in the Chinese market in 2018.

Although China's local surgical robot industrialization develops slowly, many companies, such as Jimho Robot (Shanghai), Shenzhen Mai Kangxin Medical and Anyang SF Robot, have realized prototypes of rehabilitation robots or industrialization promotion. In addition, listed companies including Shenyang SIASUN, Jinming Machinery (Guangdong), Truiking Technology and Midea Group have embarked on the layout of the industry.

Given China's intensified aging trend and huge base of physical disability, Chinese rehabilitation robot market may value RMB10 billion potentially. Chinese local rehabilitation robots with price and regional advantages will seize higher market shares in the future.

Installed Quantity of Surgical Robotics in China by City



Source: Department of Planning and Information, National Health and Family Planning Commission; ResearchInChina

The report includes the following aspects:

- Operating environments of Chinese medical robots, including international market environments and domestic policies;
- Status quo, competition pattern and market segments (rehabilitation robots and surgical robots) of China medical robot industry;
- Operation, medical robot business and development prospect of 5 overseas and 10 Chinese medical robot companies.

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