China Dental Industry Report, 2016-2020

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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 dental industry refers to medical industrial chain on the basis of oral medical consumption, consisting mainly of dental apparatus (equipments and consumables), dental medical services, etc. With the synergy of deepening implementation of new medical reform, growing per capita disposable income and raising public awareness over health, China's dental industry has witnessed robust development in recent years. The scale of dental apparatus and relevant medical services industry was roughly RMB40 billion in 2015 and is expected to hit at least RMB150 billion in 2020.

Dental apparatus: There are a great variety of dental apparatus and consumables and numerous manufacturers in China, presenting a relatively low market concentration. The revenue of enterprises each with annual revenue of RMB20 million or more from their main business operations exceeded RMB5 billion in 2015. However, the mid- to high-end market is dominated by foreign brands which entered the Chinese market via agents or branches in the early days, and some of them out of optimism about the Chinese market have built production bases in China. For example, Foshan has gathered 17 world-renowned dental equipment manufacturers including Sirona Dental.

However, China's domestic dental apparatus companies have made huge breakthroughs in some fields like dental CBCT and invisible appliance.

Hefei Meiya Optoelectronic Technology has become a major supplier of dental CBCT in China. Since the introduction of the products in 2012, the sales volume has doubled every year with a growing tendency of import substitution, and is estimated to reach 350 units in 2015. In 2015, Angel Align, an indigenous Chinese appliance brand, surpassed Align Technology's Invisalign to become the first brand in the Chinese invisible appliance market with a share of 38% (compared with a 35% share for Invisalign in China over the same period).

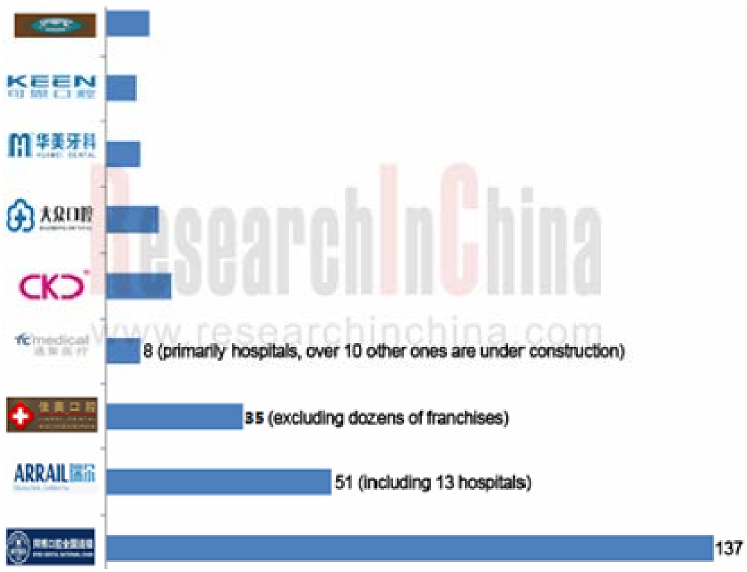
Dental medical services: The total revenue of stomatological hospitals in China rose from RMB2.37 billion in 2006 to RMB11.39 billion in 2014 at a CAGR of 21.5%. The stomatological hospitals enjoy higher gross margins (among the top three by gross margin) compared with other specialized hospitals, standing at 10.8% in 2010, 11.8% in 2011, 11.9% in 2012, 12.4% in 2013, and 13.1% in 2014.

Bybo Dental (previous iBYER Dental), ARRAIL Dental, Jiamei Dental and other private/foreign-funded dental medical institutions have been more aggressive in marketing and developed more quickly in recent years. As of Apr 2016, chain clinics (including hospitals) directly operated by the three institutions above totaled 137, 51 and 31 (excluding dozens of franchises), respectively. Moreover, these famous dental chain brands are primarily concentrated in Beijing, Shanghai, Guangzhou, Shenzhen, Hangzhou and other economically developed coastal regions, with fiercer competition in former three cities.

Strongly attracted by incentive policies and bright market prospects, sundry capital flooded into stomatological hospitals or clinics. In 2014, Legend Holdings planned to invest RMB1 billion to help iBYER Dental to join premium dental brands in the country; ARRAIL Dental Clinic received third round financing of USD70 million led by New Horizon Capital; Jiamei Dental secured a second round financing of USD100 million.

Since the introduction of industrial capital in primary market by Jiamei Dental, ARRAIL Dental, and Bybo Dental in 2014, five dental medical-related companies, namely KEEN Dental, Dazhong Dental, Huamei Dental, HUGE Dental (dental materials), and Jiahong Dental (dental materials), have so far gone listed on the National Equities Exchange and Quotations.

Major Private Dental Medical Institutions and Chain Stores (Hospitals) in China as of Apr 2016



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China Dental Industry Report, 2016-2020 highlights the followings:

- Chinese dental apparatus and materials market (size, imports & exports, competitive landscape, development forecast, etc.);
- Chinese dental medical service market (status quo, competitive landscape, development trends, etc.);
- Market segments (orthodontics, tooth implantation, and teeth whitening) in China (development status, trends, etc.);
- 11 dental apparatus suppliers and 9 private dental medical service companies in China (current development, dental business, development prospects, etc.)

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