



# China Independent Clinical Laboratory Industry Report, 2019-2025

Apr. 2019

## **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

China's independent clinical laboratory industry is still in its infancy. In 2018, it only saw the penetration rate of about 5%, far below 40% or more in Europe, the United States and Japan. The main reason is that the laboratory and pathology departments of public hospitals occupy the leading position in the industry in China.

In China, large independent clinical laboratories can provide more than 2,000 test items, while first-class AAA hospitals can only offer over 300-500 test items. With the acceleration of population aging, higher incidence of various chronic diseases and favorable policies, the penetration rate and scale of China's independent clinical laboratory industry will increase year by year.

China's independent clinical laboratory market size presented the CAGR of 40.9% during 2010-2018, and approximated RMB18.6 billion in 2018, a year-on-year increase of 37.8%. By 2025, it is expected to reach RMB96.7 billion with the growth rate of above 20%.

As of September 2018, there had been 1,271 independent clinical laboratories in China, indicating gradually intensified competition in the industry. At present, major players in China include KingMed Diagnostics, ADICON, DIAN Diagnostics, DAAN Gene, MedicalSystem Biotechnology and so forth. Particularly, KingMed Diagnostics is the industry's leader with a 22.8% market share in 2018.

As the competition intensifies, the market share of the giant KingMed Diagnostics has reduced from 32.9% in 2014 to 22.8% in 2018. In the future, small ICL companies without competitive advantages are likely to be phased out and the industry will be more concentrated.

China Independent Clinical Laboratory Industry Report, 2019-2025 highlights the following:

- Overview of China's independent clinical laboratory industry, covering development environment, status quo, market size, competitive landscape and development trend;
- Upstream and downstream sectors of China's independent clinical laboratory industry;
- Operation, gross margin, R&D investment, independent clinical laboratory business and development strategy of 21 companies in China.

Comparison between Leading Independent Clinical Laboratory Companies in China, 2018

	KingMed Diagnostics	DIAN Diagnostics	ADICON	DAAN Gene
<b>Established</b>	1994	2001	2004	2008
<b>Headquarters</b>	Guangzhou	Hangzhou	Hangzhou	Guangzhou
<b>Number of Customers</b>	22,000+	12,000+	15,000+	--
<b>Number of Laboratories</b>	37	45	20	8
<b>Business</b>	Conventional biochemical immunoassays, pathology tests, genomics tests, etc.	Diagnostic products, clinical laboratory (pathology, clinical diagnosis, molecular diagnostics), forensic testimony, physical examination, scientific research and development	Clinical laboratory (pathological examination, clinical examination and special examination), drug clinical trials, health management, paternity tests (private), scientific research and development	Diagnostic reagents and instruments, clinical laboratory
<b>Inspection Items</b>	2,500+	2,000+	2,000+	1,000+
<b>Specimens Tested Per</b>	More than 60 million cases	38 million cases	--	--
<b>Strategic Cooperation</b>	It conducts strategic cooperation with Roche, BioMérieux, Siemens, Abbott, QIAGEN, VIRION, and other international well-known companies. It has become the Chinese cooperation and demonstration bases of Roche and BioMérieux in terms of new technologies and new products. It collaborates with American Society of Clinical Pathology (ASCP) to build ASCP Pathology and Clinical Laboratory Education and Certification Training Center (Greater China). It also cooperates with Agena from the US	It cooperates with Roche in depth. At the same time, it has reached strategic cooperation with the US Johns Hopkins University, NMS (a forensic institution in the United States), Bureau of Justice of Maryland, South Korea SCL Health Management Group, Metabolon and many other world-renowned institutions	It is QUEST's co-partner in the clinical laboratory industry in the Asia-Pacific region. It has been authorized by Roche to become "Roche's Demonstration Laboratory in China" and closely collaborates with Roche. It also works with Siemens Healthineers, Japanese SRL, South Korean SCL and French BioMérieux	It cooperates with DAKO, Life Technologies and Health 100
<b>Market Share</b>	22.80%	12.70%	About 20%	2.80%
<b>Business Model</b>	Services	Agent + Services	Services	Products + Services
<b>Expansion Speed</b>	Fast	Fast	Moderate	Moderate

### 1. Overview of Independent Clinical Laboratory

- 1.1 Definition
- 1.2 Industry Chain

### 2. Overview of China Independent Clinical Laboratory Industry

- 2.1 Policy Environment
  - 2.1.1 Access Policy
  - 2.1.2 Industry Policy
- 2.2 International Environment
  - 2.2.1 Status Quo
  - 2.2.2 Benchmarking Enterprises
- 2.3 Status Quo
- 2.4 Market size
- 2.5 Competitive Landscape
- 2.6 Development Trends
  - 2.6.1 Industry Scale Expands Constantly
  - 2.6.2 Hierarchical Medical System Will Boost the Rapid Development of the Industry
  - 2.6.3 The Laboratory Outsourcing Proportion of Public Hospitals Will Rise due to Cost Control
  - 2.6.4 High-end Test Items Will Make More Revenue Contribution
  - 2.6.5 The Rapid Development of Private Hospitals Will Stimulate the Demand in the Independent Clinical Laboratory Market
  - 2.6.6 Independent Clinical Laboratory Institutions Will Become Technical Leaders amid Quick Technological Upgrades
  - 2.6.7 The Aging Population Balloons and the Demand for Medical Laboratory Will Soar
  - 2.6.8 Internet Will Stimulate the Business Model Upgrade of Independent Clinical Laboratory Industry

- 2.6.9 Intensified industry competition Forced Small Capacity to Withdraw

### 3. Upstream and Downstream Sectors of China Independent Clinical Laboratory Industry

- 3.1 Upstream Sector
  - 3.1.1 Status Quo
  - 3.1.2 Market Size
  - 3.1.3 Competitive Landscape
  - 3.1.4 Development Trend
- 3.2 Downstream Sector
  - 3.2.1 Quantity
  - 3.2.2 Medical Services
  - 3.2.3 Revenue
  - 3.2.4 Health Costs

### 4. Key Players

- 4.1 KingMed Diagnostics
  - 4.1.1 Profile
  - 4.1.2 Operation
  - 4.1.3 Revenue Structure
  - 4.1.4 Gross Margin
  - 4.1.5 R&D and Investment
  - 4.1.6 Major Customers
  - 4.1.7 Independent Clinical Laboratory Business
  - 4.1.8 Development Strategy
- 4.2 DIAN Diagnostics
  - 4.2.1 Profile

- 4.2.2 Operation
- 4.2.3 Revenue Structure
- 4.2.4 Gross Margin
- 4.2.5 R&D and Investment
- 4.2.6 Independent Clinical Laboratory Business
- 4.2.7 Development Strategy
- 4.3 Shanghai Labway Clinical Laboratory
- 4.3.1 Profile
- 4.3.2 Operation
- 4.3.3 Revenue Structure
- 4.3.4 Gross Margin
- 4.3.5 R&D and Investment
- 4.3.6 Independent Clinical Laboratory Business
- 4.4 DAAN Gene
- 4.4.1 Profile
- 4.4.2 Operation
- 4.4.3 Revenue Structure
- 4.4.4 R&D and Investment
- 4.4.5 Major Customers
- 4.4.6 Independent Clinical Laboratory Business
- 4.4.7 Development Strategy
- 4.5 ADICON Clinical Laboratories
- 4.5.1 Profile
- 4.5.2 Independent Clinical Laboratory Business
- 4.5.3 Developments
- 4.6 NYMPHAVN Biotechnology
- 4.6.1 Profile

- 4.6.2 Operation
- 4.6.3 Revenue Structure
- 4.6.4 Gross Margin
- 4.6.5 R&D and Investment
- 4.6.6 Independent Clinical Laboratory Business
- 4.6.7 Development Strategy
- 4.7 SurExam Biotechnology
- 4.7.1 Profile
- 4.7.2 Operation
- 4.7.3 Revenue Structure
- 4.7.4 Gross Margin
- 4.7.5 Independent Clinical Laboratory Business
- 4.8 MedicalSystem Biotechnology
- 4.8.1 Profile
- 4.8.2 Operation
- 4.8.3 Revenue Structure
- 4.8.4 Gross Margin
- 4.8.5 R&D and Investment
- 4.8.6 Independent Clinical Laboratory Business
- 4.8.7 Development Strategy
- 4.9 Beijing Lawke Health Laboratory
- 4.9.1 Profile
- 4.9.2 Operation
- 4.9.3 Revenue Structure
- 4.9.4 Gross Margin
- 4.9.5 R&D and Investment
- 4.10 Beijing Lepu Gene Technology
- 4.10.1 Profile

- 4.10.2 Operation
- 4.10.3 Revenue Structure
- 4.10.4 Gross Margin
- 4.10.5 R&D and Investment
- 4.10.6 Major Customers
- 4.11 Shanghai Biotecan Pharmaceuticals
  - 4.11.1 Profile
  - 4.11.2 Operation
  - 4.11.3 Revenue Structure
  - 4.11.4 Gross Margin
  - 4.11.5 Independent Clinical Laboratory Business
- 4.12 Jiangsu Superbio Life Science
  - 4.12.1 Profile
  - 4.12.2 Operation
  - 4.12.3 Revenue Structure
  - 4.12.4 Gross Margin
  - 4.12.5 Financing
- 4.13 Amoy Diagnostics
  - 4.13.1 Profile
  - 4.13.2 Operation
  - 4.13.3 Revenue Structure
  - 4.13.4 Gross Margin
  - 4.13.5 Independent Clinical Laboratory Business
  - 4.13.6 Development Strategy
- 4.14 Guangdong HybriBio Biotech
  - 4.14.1 Profile
  - 4.14.2 Operation
  - 4.14.3 Revenue Structure
  - 4.14.4 Gross Margin
  - 4.14.5 R&D
  - 4.14.6 Independent Clinical Laboratory Business
  - 4.14.7 Development Strategy
- 4.15 Other Enterprises
  - 4.15.1 Kindstar Global
  - 4.15.2 CapitalBio Corporation
  - 4.15.3 Beijing Adinovo Gene Technology Co., Ltd.
  - 4.15.4 Deyi Diagnostics
  - 4.15.5 IPE Center for Clinical Laboratory
  - 4.15.6 Centre Testing International Group Co., Ltd. (CTI)
  - 4.15.7 SinoPath Diagnosis

Independent Clinical Laboratory Industry Chain  
Comparison of Independent Clinical Laboratory Undertakers between China and USA  
Policies Concerning Independent Clinical Laboratory Industry in China, 2010-2018  
Development History of U.S. Independent Clinical Laboratory Industry  
U.S. Independent Clinical Laboratory Market Share by Test Item  
U.S. Clinical Laboratory Market Share by Demand Side  
Comparison of Independent Clinical Laboratory Market Penetration among Europe, Americas and Japan, 2018  
Revenue and Net Income of Quest Diagnostics, 2009-2018  
Revenue of Quest Diagnostics by Business, 2014-2018  
Major M&As of Quest Diagnostics, 2006-2018  
Revenue and Operating Income of LabCorp, 2010-2018  
Revenue Breakdown of LabCorp by Division, 2013-2018  
Revenue Structure of LabCorp by Division, 2013-2018  
Major M&As of LabCorp, 2007-2017  
Comparison of Independent Clinical Laboratory Market Penetration between China, and Europe, Americas and Japan, 2018  
Comparison of Number of Diagnostic Items among Various Medical Institutions  
Independent Clinical Laboratory Market Size in China, 2010-2018  
Number of Independent Clinical Laboratories in China, 2007-2018  
Independent Clinical Laboratory Revenue of Main Independent Clinical Laboratory Enterprises in China, 2014-2018  
Market Share of Independent Clinical Laboratory Enterprises in China, 2018  
Independent Clinical Laboratory Market Size and YoY Growth in China, 2018-2025E  
Policies Concerning Public Hospital Reform in China, 2015-2019  
Number of Private Hospitals and YoY Growth in China, 2009-2018  
Clinic Visits of Private Hospitals in China, 2012-2018  
Population Aged over 60 in China, 2009-2018  
Market Share of KingMed Diagnostics, 2014-2018  
Classification of In Vitro Diagnosis  
Development History of In Vitro Diagnostic Industry in China



In Vitro Diagnosis Market Size in China, 2009-2018  
In Vitro Diagnosis Market Size in China, 2018-2025E  
In Vitro Diagnosis Market Structure in China, 2018  
Comparison of Diagnostic Instrument Varieties between Domestic and Foreign Enterprises  
Competition Pattern of Diagnostic Reagent Industry in China  
IVD Revenue of Major Diagnostic Reagent Enterprises in China, 2014-2018  
IVD Market Share of Major Diagnostic Reagent Enterprises in China, 2014-2018  
Population Aged over 60 in China, 2009-2018  
Policies Concerning In Vitro Diagnosis in China  
Comparison of Prospects between In Vitro Diagnosis Segments in China  
Number of Medical and Health Institutions in China, 2015-2018  
Number of Hospitals in China, 2009-2018  
Number of Hospitals in China by Economic Type, 2009-2018  
Clinic Visits of Medical Institutions in China, 2015-2018  
Clinic Visits of Hospitals in China, 2009-2018  
Clinic Visits of Hospitals in China by Economic Type, 2012-2018  
Total Revenue of Medical and Health Institutions in China, 2010-2018  
Total Revenue of Medical and Health Institutions in China, 2018-2025E  
Total Revenue of Hospitals in China, 2009-2018  
Public Hospitals' Inspection Revenue and % of Total Inspection Revenue in China, 2010-2018  
Total Health Expenditure in China, 2010-2018  
Revenue and Net Income of KingMed Diagnostics, 2014-2018  
Revenue Breakdown of KingMed Diagnostics by Product, 2014-2018  
Revenue Breakdown of KingMed Diagnostics by Region, 2014-2018  
Gross Margin of KingMed Diagnostics by Product, 2014-2018  
KingMed Diagnostics' R&D Costs and % of Total Revenue, 2014-2018  
KingMed Diagnostics' Revenue from Top5 Clients and % of Total Revenue, 2014-2018  
Independent Clinical Laboratory Subsidiaries of KingMed Diagnostics

Operating Results of Main Companies KingMed Diagnostics Controls or Has a Stake in, 2017-2018 (Unit: RMB mln)

Output, Capacity and Capacity Utilization of KingMed Diagnostics, 2014-2016

Unit Prices of Main Services of KingMed Diagnostics, 2014-2016

Revenue and Net Income of DIAN Diagnostics, 2013-2018

Revenue Breakdown of DIAN Diagnostics by Product, 2013-2018

Revenue Breakdown of DIAN Diagnostics by Region, 2013-2018

Gross Margin of DIAN Diagnostics by Business, 2013-2018

DIAN Diagnostics' R&D Costs and % of Total Revenue, 2013-2018

DIAN Diagnostics' Revenue from Independent Clinical Laboratory and % of Total Revenue, 2013-2018

Independent Clinical Laboratory Subsidiaries of DIAN Diagnostics

Regional Layout of Shanghai Labway Clinical Laboratory

Revenue and Net Income of Shanghai Labway Clinical Laboratory, 2013-2017

Operating Revenue Breakdown of Shanghai Labway Clinical Laboratory by Business, 2013-2017

Gross Margin of Shanghai Labway Clinical Laboratory by Business, 2013-2016

Shanghai Labway Clinical Laboratory's R&D Costs and % of Total Revenue, 2013-2017

Independent Clinical Laboratory Subsidiaries of Shanghai Labway Clinical Laboratory

Main Diagnostic Items of Shanghai Labway Clinical Laboratory

Shanghai Labway Clinical Laboratory's Revenue from Independent Clinical Laboratory and % of Total Revenue, 2013-2017

Revenue and Net Income of DAAN Gene, 2013-2018

Revenue Breakdown of DAAN Gene by Product, 2013-2018

Revenue Breakdown of DAAN Gene by Region, 2013-2018

DAAN Gene's R&D Costs and % of Total Revenue, 2013-2018

DAAN Gene's Revenue from Top 5 Clients and % in Total Revenue, 2015-2018

DAAN Gene's Revenue from Independent Clinical Laboratory and % of Total Revenue, 2013-2018

Independent Clinical Laboratory Subsidiaries of DAAN Gene

Development Course of ADICON Clinical Laboratories

Revenue and Net Income of Nymphavn Biotechnology, 2013-2018

Revenue Breakdown of Nymphavn Biotechnology by Business, 2014-2018  
Gross Margin of Nymphavn Biotechnology, 2013-2018  
Nymphavn Biotechnology's R&D Costs and % of Total Revenue, 2013-2018  
Nymphavn Biotechnology's Revenue from Independent Clinical Laboratory and % of Total Revenue, 2013-2018  
Subsidiaries and Main Businesses of Surexam Biotechnology  
Revenue and Net Income of SurExam Biotechnology, 2013-2018  
Operating Revenue Breakdown of SurExam Biotechnology by Business, 2013-2018  
Gross Margin of SurExam Biotechnology, 2013-2018  
SurExam Biotechnology's Revenue from Independent Clinical Laboratory and % of Total Revenue, 2013-2017  
Revenue and Net Income of Medicsystem Biotechnology, 2013-2018  
Revenue Breakdown of Medicsystem Biotechnology by Business, 2013-2018  
Gross Margin of Medicsystem Biotechnology by Business, 2013-2018  
Medicsystem Biotechnology's R&D Costs and % of Total Revenue, 2013-2018  
Investment Progress of Fundraising Projects of Medicsystem Biotechnology by the end of 2018  
Medicsystem Biotechnology's Revenue from Independent Clinical Laboratory and % of Total Revenue, 2013-2018  
Financial Data of Main Independent Clinical Laboratory Subsidiaries of Medicsystem Biotechnology, 2016-2018  
Newly-established Independent Clinical Laboratory Subsidiaries of Medicsystem Biotechnology, 2016-2018  
Revenue and Net Income of Beijing Lawke Health Laboratory, 2013-2017  
Revenue Breakdown of Beijing Lawke Health Laboratory by Region, 2014-2017  
Gross Margin of Beijing Lawke Health Laboratory, 2013-2017  
Beijing Lawke Health Laboratory's R&D Costs and % of Total Revenue, 2013-2017  
Revenue and Net Income of Beijing Lepu Gene Technology, 2013-2018  
Revenue Breakdown of Beijing Lepu Gene Technology by Business, 2014-2018  
Gross Margin of Beijing Lepu Gene Technology, 2013-2018  
Beijing Lepu Gene Technology's R&D Costs and % of Total Revenue, 2014-2018  
Beijing Lepu Gene Technology's Revenue from Top 5 Clients and % in Total Revenue, 2015-2018  
Revenue and Net Income of Shanghai Biotecan Pharmaceuticals, 2013-2017  
Revenue Breakdown of Shanghai Biotecan Pharmaceuticals by Business, 2014-2017

Gross Margin of Shanghai Biotecan Pharmaceuticals, 2013-2017  
Shanghai Biotecan Pharmaceuticals' Revenue from Independent Clinical Laboratory and % of Total Revenue, 2014-2017  
Subsidiaries of Jiangsu Superbio Life Science as of Apr 2019  
Revenue and Net Income of Jiangsu Superbio Life Science, 2014-2017s  
Revenue Breakdown of Jiangsu Superbio Life Science by Business, 2014-2017  
Gross Margin of Jiangsu Superbio Life Science, 2014-2017  
Revenue and Net Income of Amoy Diagnostics, 2014-2018  
Operating Revenue Breakdown of Amoy Diagnostics by Business, 2014-2018  
Gross Margin of Amoy Diagnostics, 2014-2018  
Gross Margin of Amoy Diagnostics by Business, 2014-2018  
Clinical Laboratory Testing Service Process of Amoy Diagnostics  
Main Bioassay Service Partners of Amoy Diagnostics  
Amoy Diagnostics' Revenue from Independent Clinical Laboratory and % of Total Revenue, 2014-2018  
Revenue and Net Income of Guangdong Hyribio Biotech, 2014-2018  
Operating Revenue Breakdown of Guangdong Hyribio Biotech by Product, 2014-2018  
Gross Margin of Guangdong Hyribio Biotech by Business, 2014-2018  
Guangdong Hyribio Biotech's R&D Costs and % of Total Revenue, 2017-2018  
Progress of Committed Fundraising Projects of Guangdong Hyribio Biotech by the end of 2018  
Guangdong Hyribio Biotech's Revenue from Independent Clinical Laboratory and % of Total Revenue, 2014-2018  
Milestones of Kindstar Global  
Some Strategic Partners of ADINOVO

You can place your order in the following alternative ways:

1. Order online at [www.researchinchina.com](http://www.researchinchina.com)
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: [report@researchinchina.com](mailto:report@researchinchina.com)
4. Phone us at +86 10 82600828

<b>Party A:</b>			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

<b>Party B:</b>			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 801, B1, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	<a href="mailto:report@researchinchina.com">report@researchinchina.com</a>	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

Choose type of format

- PDF (Single user license) .....3,000 USD
- Hard copy ..... 3,200 USD
- PDF (Enterprisewide license)..... 4,500 USD

※ Reports will be dispatched immediately once full payment has been received.  
Payment may be made by wire transfer or credit card via PayPal.

### About ResearchInChina

ResearchInChina ([www.researchinchina.com](http://www.researchinchina.com)) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

#### Our Major Activities

- *Multi-users market reports*
- *Database-RICDB*
- *Custom Research*
- *Company Search*

**RICDB** (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at [www.researchinchina.com](http://www.researchinchina.com)

For any problems, please contact our service team at: