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China Dental Industry Report, 2014-2018

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Abstracts

Oral industry refers to the medical industry chain on the basis of oral medical consumption, mainly covering oral medical apparatus (equipment and consumables) and oral medical services. As reform of medical and health care system further deepens, the rise in per capita disposable income and the growing awareness of health have bolstered rapid development of the oral industry in China over recent years.

Oral medical apparatus: In 2013, the revenue of enterprises each with annual revenue of RMB20 million or more from their main business operations in China oral medical apparatus industry rose by 31.9% from a year earlier to RMB5.025 billion, and the figure for the first eleven months of 2014 reached RMB3.623 billion, well above that in 2012, despite a decline in year-on-year growth.

There are a great variety of oral apparatus and consumables and numerous manufacturers in China, presenting a relatively low market concentration. 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 built production bases in China. For example, Foshan has gathered 17 world-renowned dental equipment manufacturers including Sirona Dental.

In 2012, Hefei Meiya Optoelectronic Technology launched its dental CBCT, breaking the monopoly of foreign brands (American Carestream, German Kavo and Sirona, Italian New Tom, Finnish Planmeca and South Korean Vatech) in the market segment, and showing conspicuous tendency of import substitution. By virtue of price advantage and excellent after-sales service, the output in the first half of 2014 was basically flat with 2013, standing at around 60 units.

Oral medical services: The total revenue of stomatological hospitals in China increased from RMB2.37 billion to RMB8.1 billion during 2006-2012 with a CAGR of 22.7%. The

stomatological hospitals enjoy higher gross margins compared with other specialized hospitals, being 10.8% in 2010, 11.8% in 2011, and 11.9% in 2012.

However, iBYER Dental, ARRAIL Dental, Jiamei Dental and other private and foreign oral medical institutions have been more aggressive in marketing and developed more quickly in recent years. As of Jan. 2015, chain clinics (including hospitals) directly operated by the three institutions above totaled over 60, 33 and 31, respectively. Moreover, these famous oral chain brands are concentrated mainly in Beijing, Shanghai, Guangzhou, Shenzhen, Hangzhou and other economically developed coastal regions, with fiercer competition in the former three cities.

Promoted by incentive policies and good market prospect, sundry capital flooded into stomatological hospitals or clinics. Greentown Stomatological Hospital invested by Greentown officially opened on Jul. 11, 2012; Legend Holdings planned to invest RMB1 billion in 2014 to help iBYER Dental to join premium dental brands in the country; in the same year, ARRAIL Dental Clinic received third round financing of USD70 million led by New Horizon Capital.

The report focuses on the following:

- Size, import & export, competitive landscape and development forecast of the Chinese oral apparatus and material market;
- Situation, competitive landscape and development trend of the Chinese oral medical service market;
- Development, oral medical business and development prospects of 9 oral apparatus suppliers and 6 private oral medical service providers in China.

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