

China Independent Clinical Laboratory Industry Report, 2015-2018

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Abstracts

The independent clinical laboratory originated from the U.S. and is relatively mature in developed countries/regions like North America, Europe, and Japan, whose independent clinical laboratory market size takes up 38%, 50%, and 67% of medical diagnostic markets of their own. Chinese independent clinical laboratory market size was around RMB4.73 billion in 2014, accounting for only 2%-3% of its own medical diagnostic market.

However, owing to large population base, uneven distribution of medical resources among regions, aging population, and continuous advance of health care reform, the Chinese independent clinical laboratory market size is expected to grow rapidly at a rate of 30%-40% over the next three to five years and reach RMB16.4 billion in 2018. Furthermore, affected by economic level, medical needs, and people's cognition, the Chinese independent clinical laboratory market is still concentrated in southeastern coastal areas and provincial capitals, such as Beijing, and Chengdu and Chongqing in Southwest China.

There are about 110 independent clinical laboratory enterprises in China, mainly comprehensive diagnostic chains and special diagnostic enterprises. KingMed Diagnostics, Dian Diagnostics, ADICON Clinical Laboratories, and DaAn Health (invested by Da An Gene), which hold a combined market share of 70%, all adopt chain-based model of comprehensive diagnostic services. By the end of 2014, the four enterprises separately had 27, 19, 15, and 8 independent clinical laboratories.

Being bullish about the prospects of the Chinese independent clinical laboratory market, a number of foreign companies started getting involved into the field recently.

Tianbo Lab jointly set up by the South Korea-based SK Group and Xi'an Tianlong Science & Technology Co. Ltd started business in July 2014. SK plans to develop a healthcare industrial pattern based in Xi'an and radiating 19 provinces in China; On Aug 3, 2015, AccuraGen, headquartered in Silicon Valley, U.S., signed with Precision Medical Center of Zhejiang-California International NanoSystems Institute to set up a pilot laboratory, and established strategic partnership with Shanghai Xinhua Hospital to carry out gene sequencing R&D technology services and product clinical pilot for tumor therapy.

In early 2015, Yunnan Baiyao announced to set up an independent clinical laboratory-T&Z Testing International (Yunnan) Co., Ltd., the country's first independent clinical laboratory transformed from a lab of pharmaceutical company, and controlled by Yunnan Baiyao Group Co., Ltd. and Yunnan Institute of Materia Medica.

Up to now, the Internet medical companies like DXY and Chunyu Yisheng, which started from the doctor consultation and information exchange platform, not only have expanded to offline clinic business but also are actively seeking to cooperate with independent clinical laboratories during the transition from being virtual to real.

China Independent Clinical Laboratory Industry Report, 2015-2018 highlights the followings:

Policy environment, international market, development status, and competitive landscape of China's independent clinical laboratory industry;

Upstream and downstream markets of China's independent clinical laboratory industry and their impacts;

Operation, and independent clinical laboratory business of 14 relevant enterprises in China;

Prospects for the development of China's independent clinical laboratory industry in 2015-2018 and operational comparison among key players.

Contents

1 OVERVIEW OF INDEPENDENT CLINICAL LABORATORY

- 1.1 Definition
- 1.2 Industry Chain

2 OVERVIEW OF CHINA'S INDEPENDENT CLINICAL LABORATORY INDUSTRY

- 2.1 Policy Environment
 - 2.1.1 Access Policy
 - 2.1.2 Industry Policy
- 2.2 International Market
 - 2.2.1 Status Quo
 - 2.2.2 Analysis of Benchmarking Company
- 2.3 Development
- 2.4 Competitive Landscape

3 UPSTREAM AND DOWNSTREAM OF CHINA'S INDEPENDENT CLINICAL LABORATORY INDUSTRY

- 3.1 Upstream Market
 - 3.1.1 Status Quo
 - 3.1.2 Competitive Landscape
- 3.2 Downstream Market
 - 3.2.1 Independent Clinical Laboratory Market Sees Huge Capacity
 - 3.2.2 Healthcare Reform Boosts Rapid Development of Independent Clinical Laboratory Market
 - 3.2.3 Demand Diversification Promotes Upgrading of Independent Clinical Laboratory Industry
 - 3.2.4 Healthcare Demand Growth Propels the Independent Clinical Laboratory Forward Faster

4 MAJOR INDEPENDENT CLINICAL LABORATORY ENTERPRISES IN CHINA

- 4.1 KingMed Diagnostics
 - 4.1.1 Profile
 - 4.1.2 Independent Clinical Laboratory Business
 - 4.1.3 Operation and Development

- 4.2 ADICON Clinical Laboratories, Inc
 - 4.2.1 Profile
 - 4.2.2 Independent Clinical Laboratory Business
 - 4.2.3 Development
- 4.3 Zhejiang Dian Diagnostics Co., Ltd.
 - 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
 - 4.3.7 Customers and Suppliers
 - 4.3.8 Forecast and Outlook
- 4.4 Da An Gene Co., Ltd. of Sun Yat-Sen University
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 Revenue Structure
 - 4.4.4 Gross Margin
 - 4.4.5 R&D and Investment
 - 4.4.6 Independent Clinical Laboratory Business
 - 4.4.7 Customers and Suppliers
 - 4.4.8 Forecast and Outlook
- 4.5 Nymphavn Biotechnology Corporation Ltd.
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Revenue Structure
 - 4.5.4 Gross Margin
 - 4.5.5 R&D and Investment
 - 4.5.6 Independent Clinical Laboratory Business
 - 4.5.7 Forecast and Outlook
- 4.6 Surexam Biotechnology Co., Ltd.
 - 4.6.1 Profile
 - 4.6.2 Operation
 - 4.6.3 Revenue Structure
 - 4.6.4 Gross Margin
 - 4.6.5 Independent Clinical Laboratory Business
 - 4.6.6 Forecast and Outlook
- 4.7 Ningbo Medicalsystem Biotechnology Co., Ltd.
 - 4.7.1 Profile

- 4.7.2 Operation
- 4.7.3 Revenue Structure
- 4.7.4 Gross Margin
- 4.7.5 R&D and Investment
- 4.7.6 Independent Clinical Laboratory Business
- 4.7.7 Forecast and Outlook
- 4.8 Amoy Diagnostics Co., Ltd.
 - 4.8.1 Profile
 - 4.7.2 Independent Clinical Laboratory Business
- 4.9 CapitalBio
 - 4.9.1 Profile
 - 4.9.2 Independent Clinical Laboratory Business
- 4.10 Beijing Adinovo Gene Technology Co., Ltd.
 - 4.10.1 Profile
 - 4.10.2 Independent Clinical Laboratory Business
- 4.11 Kindstar Global
 - 4.11.1 Profile
 - 4.11.2 Independent Clinical Laboratory Business
- 4.12 Deyi Diagnostics
 - 4.12.1 Profile
 - 4.12.2 Independent Clinical Laboratory Business
- 4.13 Beijing IPE Biotechnology Co. Ltd
- 4.14 Shanghai Biotecan Pharmaceuticals Co., Ltd.

5 PREDICTION AND OUTLOOK

- 5.1 Industry Development
- 5.2 Operation Comparison among Enterprises
 - 5.2.1 Revenue
 - 5.2.2 Gross Margin

Selected Charts

SELECTED CHARTS

Independent Clinical Laboratory Industry Chain

Comparison of Independent Clinical Laboratory Undertakers between China and USA

Policies on Independent Clinical Laboratory Industry in China, 2010-2015

Market Share of Independent Clinical Laboratories in Major Countries

U.S. Independent Clinical Laboratory Market Share by Test Item

U.S. Clinical Laboratory Market Share by Demand Side

Revenue and Net Income of Quest, 2009-2015

Revenue of Quest Diagnostics by Business, 2014

Major M&As of Quest Diagnostics, 2006-2015

Revenue and Operating Income of LabCorp, 2010-2015

Revenue Breakdown of LabCorp by Business, 2010-2014

Major M&As of LabCorp, 2007-2015

Revenue CAGR of Some Independent Clinical Laboratory Enterprises in China, 2012-2014

Market Share of Major Enterprises in China's Independent Clinical Laboratory Industry, 2014

Basic Characteristics and Market Share of Major Independent Clinical Laboratory Enterprises in China, 2014

Development History of In Vitro Diagnostic Industry in China

Market Size of In Vitro Diagnostic Industry in China, 2009-2014

Market Structure of In Vitro Diagnostic Reagent Industry in China, 2014

Comparison of Diagnostic Instrument Varieties between Domestic and Foreign Companies

Competitive Landscape of Diagnostic Reagent Industry in China

IVD Revenue and Market Share of Major Diagnostic Reagent Enterprises in China, 2013-2014

Business Revenue and Inspection Revenue of Public Hospitals in China, 2013

Per Capita Inspection Fees and % of Outpatient Expenses of Outpatients in Chinese Hospitals, 2009-2013

Per Capita Inspection Fees and % of Hospitalization Expenses of Inpatients in Chinese Hospitals, 2009-2013

Business Revenue and Inspection Revenue of Public Hospitals in China by Type of Visit, 2013

Medical Services of Health Agencies in China, 2012-2014

Number of Medical Institutions in China, 2012-2014

Health Expenditure and % of GDP in China, 1980-2014
Per Capita Health Expenditure and YoY Growth in China, 2006-2014
Revenue of KingMed Diagnostics, 2012-2015
Subsidiaries of DIAN Diagnostics by the end of Jun 2015
Revenue and Net Income of DIAN Diagnostics, 2010-2015
Revenue Breakdown of DIAN Diagnostics by Product, 2010-2015
Revenue Structure of DIAN Diagnostics by Product, 2010-2015
Revenue Breakdown of DIAN Diagnostics by Region, 2009-2014
Gross Margin of DIAN Diagnostics, 2010-2015
Gross Margin of DIAN Diagnostics by Product, 2010-2015
R&D Costs and % of Total Revenue of DIAN Diagnostics, 2010-2015
DIAN Diagnostics' Revenue from Independent Clinical Laboratory and YoY Growth, 2009-2015
DIAN Diagnostics' Revenue from Top 5 Customers and % of Total Revenue, 2011-2014
DIAN Diagnostics' Procurement from Top 5 Suppliers and % of Total Procurement, 2012-2015
Revenue and Net Income of DIAN Diagnostics, 2014-2018E
Revenue and Net Income of Da An Gene, 2010-2015
Revenue Breakdown of Da An Gene by Business, 2010-2015
Revenue Structure of Da An Gene by Business, 2010-2015
Revenue Breakdown of Da An Gene by Region, 2010-2015
Revenue Structure of Da An Gene by Region, 2010-2015
Gross Margin of Da An Gene, 2010-2015
Gross Margin of Da An Gene by Business, 2010-2015
R&D Costs and % of Total Revenue of Da An Gene, 2011-2015
Main Assets and Business of Da An Gene
Industrial Chain Layout of Da An Gene
Medical Resources of Sun Yat-Sen University
Da An Gene's Revenue from Independent Clinical Laboratory and YoY Growth, 2010-2015
Top 5 Clients of Da An Gene, 2014
Top 5 Suppliers of Da An Gene, 2014
Revenue and Net Income of Da An Gene, 2014-2018E
Revenue and Net Income of Nymphavn Biotechnology, 2009-2015
Revenue Breakdown of Nymphavn Biotechnology by Product, 2009-2015
Revenue Structure of Nymphavn Biotechnology by Product, 2009-2015
Gross Margin of Nymphavn Biotechnology, 2009-2015
Gross Margin of Nymphavn Biotechnology by Product, 2009-2015

R&D Costs and % of Total Revenue of Nymphavn Biotechnology, 2011-2015
Revenue from and Gross Margin of Independent Clinical Laboratory Business of Nymphavn Biotechnology, 2009-2015
Revenue and Net Income of Nymphavn Biotechnology, 2014-2018E
Subsidiaries and Main Businesses of Surexam Biotechnology
Revenue and Net Income of Surexam Biotechnology, 2011-2015
Revenue Breakdown of Surexam Biotechnology by Business, 2011-2015
Gross Margin of Surexam Biotechnology, 2011-2015
Surexam Biotechnology's Revenue from Independent Clinical Laboratory, 2011-2015
Revenue and Net Income of Surexam Biotechnology, 2014-2018E
Revenue and Net Income of Medicalsystem Biotechnology, 2011-2015
Revenue Breakdown of Medicalsystem Biotechnology by Product, 2011-2015
Gross Margin of Medicalsystem Biotechnology by Product, 2011-2015
R&D Costs and % of Total Revenue of Medicalsystem Biotechnology, 2011-2015
Projects Proposed/Under Construction of Medicalsystem Biotechnology
Revenue from and Gross Margin of Independent Clinical Laboratory Business of Medicalsystem Biotechnology, 2011-2015
Revenue and Net Income of Medicalsystem Biotechnology, 2014-2018E
Some Strategic Partners of Beijing ADINOVO Gene Technology
Milestones of Kindstar Global
Chinese Independent Clinical Laboratory Market Size and YoY Growth, 2014-2018E
Revenue of Major Independent Clinical Laboratory Enterprises in China, 2011-2015
Clinical Laboratory Revenue of Major Enterprises in Independent Clinical Laboratory Industry in China, 2011-2015
Gross Margin of Major Enterprises in Independent Clinical Laboratory Industry in China, 2011-2015
Gross Margin of Clinical Laboratory Business of Major Independent Clinical Laboratory Enterprises in China, 2011-2015

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