

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.

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