

China Hemodialysis Industry Report, 2009-2010

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Abstracts

In 2009, China's hemodialysis equipment market scale reached RMB1.06 billion, representing less than 2% of the world's total. There are only 10-15% patients suffering end-stage renal failure accepting dialysis therapy, lagging far behind the 95% in developed countries and indicating considerable market potential.

Chinese hemodialysis equipment manufacturers as latecomers feature underdeveloped technology and poor competitiveness, resulting in the low market occupancy. At present, China imports over 90% of the hemodialysis equipment such as dialysis machines, dialysers and blood tubing sets from Europe and Japan. Take hemodialyzer for example, four foreign enterprises - Germany-based Fresenius, Japan-based Nipro and Asahi, Sweden-based Gambro - held a lion's share of 69% in Chinese market in 2009, while the largest domestic enterprise - Shandong Weigao - only occupied 4.5%.

This report not only highlights the status quo, competition pattern and development trend of the hemodialysis industry and market segments, but elaborates on the operation and prospect of five foreign hemodialysis equipment manufacturers including Germany-based Fresenius, Japan-based Nikkiso and Asahi, America-based Baxter International and Sweden-based Gambro as well as several large-scale domestic hemodialysis equipment manufacturers.

An overwhelming majority of Chinese enterprises focus on making products with low technological content such as blood tubing set and dislysate, while few enterprises are engaged in the production of high-end dialyzers and dialysis machines.

Shandong Weigao is a leading domestic enterprise in China's dialyzer market. In April 2010, Weigao collaborated with Nikkiso to develop and sell dialysis machines. Guangzhou Jihua Medical Apparatus and Instruments, the only domestic manufacturer specializing in the mass production of hemodialysis machines, ranked the first place in

terms of export value during January-August, 2010.

Bain Medical Equipment (Guangzhou) is a professional supplier of hemodialysis consumables, and also the largest blood tubing set supplier in China. In August 2008, Bain began to provide OEM service for Asahi Kasei Kuraray Medical, making itself one of the few enterprises providing OEM service for mid-and high-end products of world-renowned medical device enterprises.

Beijing United Jie Ran Bio-Tech is a domestic manufacturer specializing in the production of hemodialysis water and dialysis powder, and is the general agent of Germany-based B. Braun Group's hemodialysis products in North China. Jiangsu Lengthen Life Science and Technology is a competitive enterprise specializing in the production of hollow-fiber hemodialyzers, with an annual capacity of 3.4 million dialyzers.

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