

# Research Report on Global and China In-vitro Diagnostic Reagent Industry, 2013-2017

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## Abstracts

In Chinese market, there are mainly three categories of in-vitro diagnostic reagents, biochemical diagnostic reagents, immune diagnostic reagents and molecular diagnostic reagents, accounting for about 65% of in-vitro diagnostic reagent market in total in 2012.

Global in-vitro diagnostics market is mature and the concentration rate is high. The 8 major enterprises account for over 70% market share. In 2011, the market scale of global in-vitro diagnostics reached USD 46 billion, among which developed countries accounted for over 80%. Currently, emerging economic entities occupy low proportions, while their growth rates are far ahead of that of mature markets.

In China, barriers to entry of this industry are not high and the concentration rate is low. The majority of enterprises concentrate in the biochemical reagent field, so the competition is mainly in the biochemical field. Both the supply and demand of immune and molecular products are prosperous. In addition to immune reagents, markets of other diagnostic reagents are mainly occupied by Chinese domestic enterprises. Although China in-vitro diagnostic reagent industry started late and its scale is limited, it grows rapidly. In 2012, the market scale reached CNY 13.6 billion, among which immune diagnostic reagents, biochemical diagnostic reagents and molecular diagnostic reagents ranked among the top.

According to the investigation of CRI, the production line utilization of various in-vitro diagnostic reagent manufacturers is universally high. Therefore, CRI predicts that the production capacity of the industry will expand in the future. Furthermore, the development strategy of most enterprises is transversely enriching product varieties and vertically developing towards the upstream and downstream.

China's population accounts for more than 20% of the world's population, while the market share of in-vitro diagnostics is less than 5% of the world's; in 2012, the annual consumption per capita of China's in-vitro diagnostic products was less than USD 2, while that of developed countries reached USD 25 to USD 30. Therefore, there is a wide growth space for China's in-vitro diagnostics. CRI predicts that the growth rate of the market scale of China's in-vitro diagnostics will be markedly higher than the global average level and the CAGR will maintain over 15% from 2013 to 2017. By 2017, the market scale will reach CNY 30 billion, among which immune and biochemical products will continually occupy most of the market share, while the proportion of molecular products will relatively increase. During the upgrading of products in the future and the process of domestic substitution, the industry concentration rate will grow.

Before 2003, medium and high-end diagnostic products were monopolized by imports, but the improvement of domestic diagnostic reagent production levels has significantly changed the market pattern. In the primary market, the share of domestically made reagents is increasing gradually, while foreign enterprises still dominate the instrument market. Currently, Chinese domestic enterprises are gradually expanding from reagents to instruments and occupying the market through advantages of instruments to promote the sales of reagents. As diagnostic services are charged by project, medical institutions prefer cheaper domestically produced reagents as long as the quality is ensured. The costs saved can directly become revenue of the institutions. Currently, biochemical and enzyme immunoassay diagnostics continue to dominate the market of diagnostic reagents.

Readers can obtain the following information or more through this report:

Status of Global and China In-vitro Diagnostic Reagents

Governmental Policies on China In-vitro Diagnostic Reagent Industry

Status of Market Competition in In-vitro Diagnostic Reagent Industry

Major In-vitro Diagnostic Reagent Manufacturers in Global and China Markets

Forecast on the Development of In-vitro Diagnostic Reagent Industry

The Following Enterprises and People Are Recommended to Purchase This Report:

In-vitro Diagnostic Reagent Manufacturers

In-vitro Diagnostic Reagent Trading Enterprises

Medical Institutions

Research Institutions/Investors Concerned About In-vitro Diagnostic Reagent Industry

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