

# Research Report on China's In-vitro Diagnostic Reagent Industry, 2012

<https://marketpublishers.com/r/R54D8BABE42EN.html>

Date: June 2012

Pages: 60

Price: US\$ 3,000.00 (Single User License)

ID: R54D8BABE42EN

## Abstracts

In-vitro diagnostics is a diagnostics method through detecting samples (blood, body fluid, tissues, etc.) taken out from human bodies so as to judge diseases and functions of organisms. In most cases, the detection system composed of detection instruments and reagents are applied in in-vitro diagnostics.

In-vitro diagnostic reagents are used to carry out in-vitro detection for human samples. In Chinese market, there are mainly three categories, biochemical diagnostic reagents, immune diagnostic reagents and molecule diagnostic reagents, accounting for over 60% of the market share of in-vitro diagnostic reagents in total in 2011.

The global in-vitro diagnostics market is mature and the concentration rate is high. Major 8 enterprises account for over 70% of the market share. In 2011, the market scale of global in-vitro diagnostics was as high as USD 44 billion, among which Europe, the United States, Japan and other developed countries accounted for 87%. Emerging economic entities accounted for few proportions, while its growth rate was far ahead of mature markets.

In China, market access barriers of this industry are not high and the concentration is low. The majority of enterprises concentrate in the biochemical reagent field and synthetic enterprises are few, the competition is mainly in bio-chemical field therefore. Both the supply and demand of immune and molecule products are prosperous. In addition to immune reagents, markets of other diagnostic reagents are mainly occupied by Chinese domestic enterprises. Although Chinese in-vitro diagnostic reagent industry starts late, it has the rapid growth rate. In 2011, the market scale has reached CNY 11.5 billion, among which immune diagnostic reagents accounted for 33%, as well as biochemical diagnostic reagents and molecular diagnostic reagents separately

accounted for 27% and 5%.

According to the investigation of CRI, the productivity utilization of China's major in-vitro diagnostic reagent manufacturers is universally high. As a result, it is predicted that the productivity 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 upper and downstream integration.

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; in 2011, 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. As a consequence, there is a wide increase space for China's in-vitro diagnostics. It is predicted that during 2012 and 2016, the growth rate of the market scale of China's in-vitro diagnostics will be markedly higher than the global average level and the annual compound growth rate will maintain over 15%. By 2016, the market scale will achieve USD 24.1 billion, among which immune and biochemical products will continually occupy the main market share, while the proportion of molecular products will relatively increase. During the upgrading and updating of products in the future and the process of domestic substitution, the industry concentration rate will be intensified.

More following information can be acquired through this report:

Development Course and Current Situation of China's In-vitro Diagnostic Reagent Industry

Government Policies Faced by China's In-vitro Diagnostic Reagent Industry

Market Competition of In-vitro Diagnostic Reagent Industry

China's Major Manufacturers of In-vitro Diagnostic Reagents

Prediction on Development of In-vitro Diagnostic Reagent Industry

Following people are recommended to buy this report:

Manufacturers of In-vitro Diagnostic Reagents

Trade Enterprises of In-vitro Diagnostic Reagents

Investors and Research Institutions Focusing on In-vitro Diagnostic Reagent Industry

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