



中国医疗器械行业协会  
China Association for Medical Devices Industry

# The Current Situation of Medical Devices Industry in China

**September. 2018. Beijing**

# CONTENTS

**Chapter1**

**About US**

**Chapter2**

**The Current Situation**

# About Us

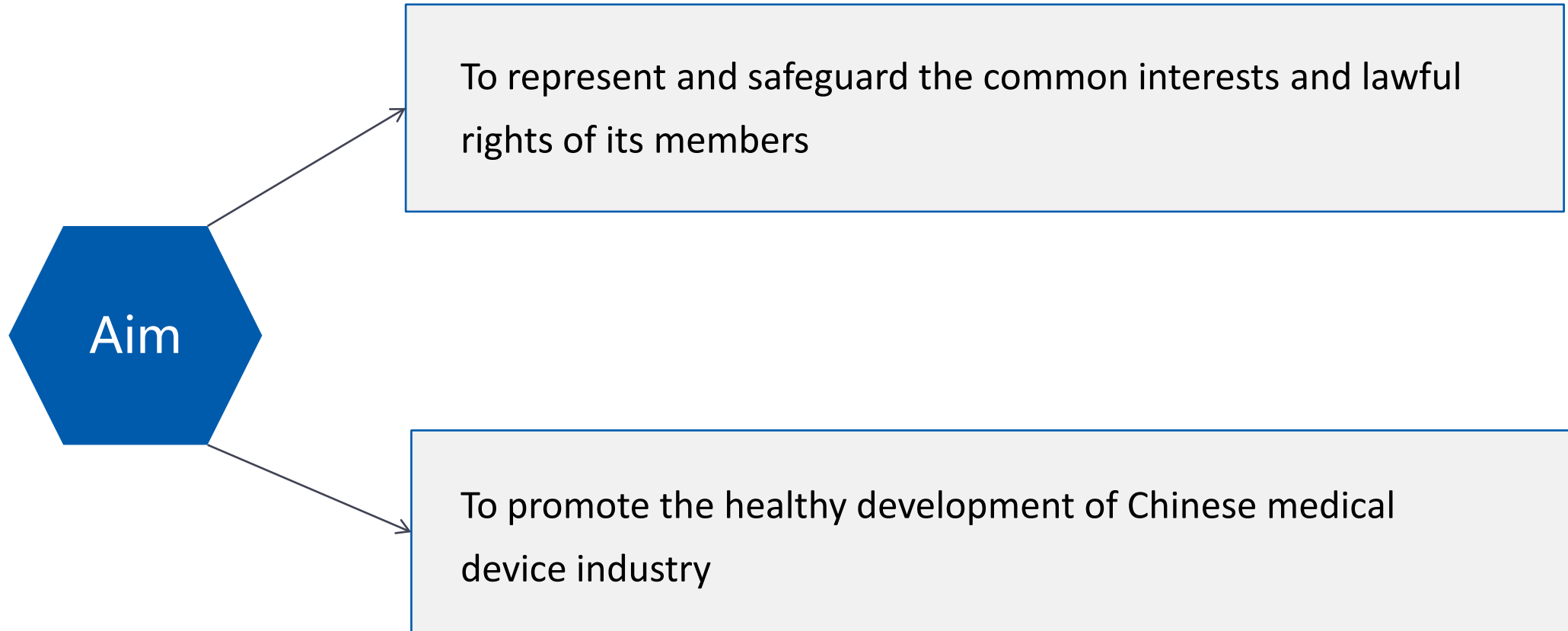
## Chapter 1

China Association for Medical Devices Industry (CAMDI) is a national, industrial and nonprofit social organization that is founded in 1991 on a voluntary basis, by companies and individuals engaged in medical device manufacturing, management, R&D, investment, inspection, testing, certification consulting, education & training. CAMDI has the corporative qualifications of a social group.

CAMDI is under the supervision and administration of State-owned Assets Supervision and Administration Commission(SASAC). SASAC appoints and authorizes China Federation of Industrial Economics to manage CAMDI on his behalf. Meanwhile, CAMDI is under the professional guidance of relevant organizations such as CFDA, MCA and NDRC.

# About Us

## Chapter 1



# About Us

## Chapter 1



27 full-time staff in the secretariat

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53 branches and professional committees

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4000 members and experts

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# About Us

## Chapter 1

01

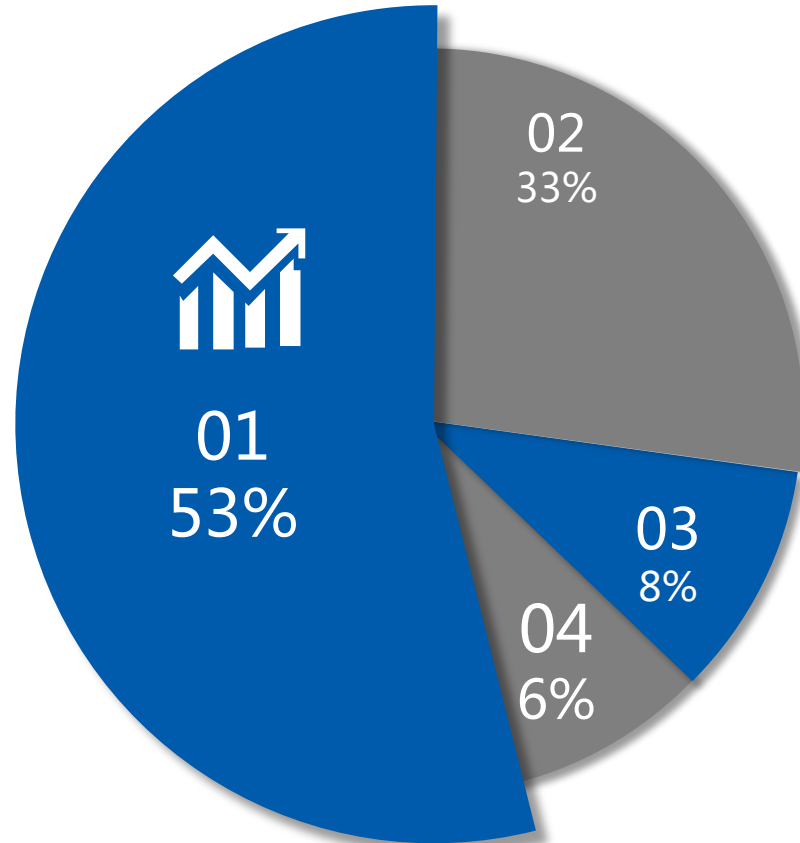
### Domestic Manufacturers

SHINVA, Mindray, WEGO,  
Yuwell, United-imaging,  
LepuMedical, Microport.....

02

### Foreign Manufacturers

Medtronic, J&J, GE, SIEMENS,  
PHILIPS, Smith-Nephew, BD  
Boston Scientific, Abbott.....



03

### Distributors

China Medical Devices Company,  
JoinTown, Cardinal.....

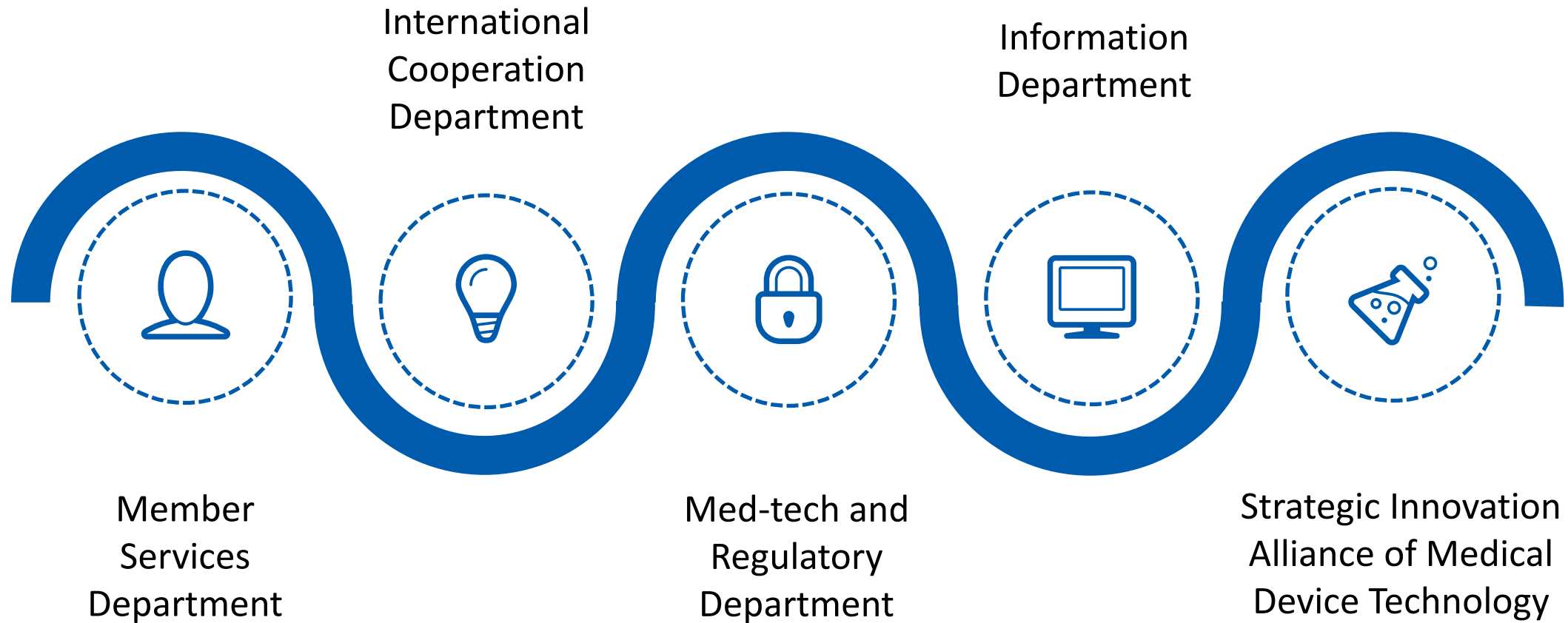
04

### Others

University, Laboratory,  
Consulting.....

# About Us

## Chapter 1



# About Us

## Chapter 1

Respond to the demands of members



Provide reasonable suggestions for the government to formulate regulatory policies

Assist the government in industry services and researches, expand and improve membership services

Widening international communication channels and construct platforms for international cooperation



# CONTENTS

**Chapter1**

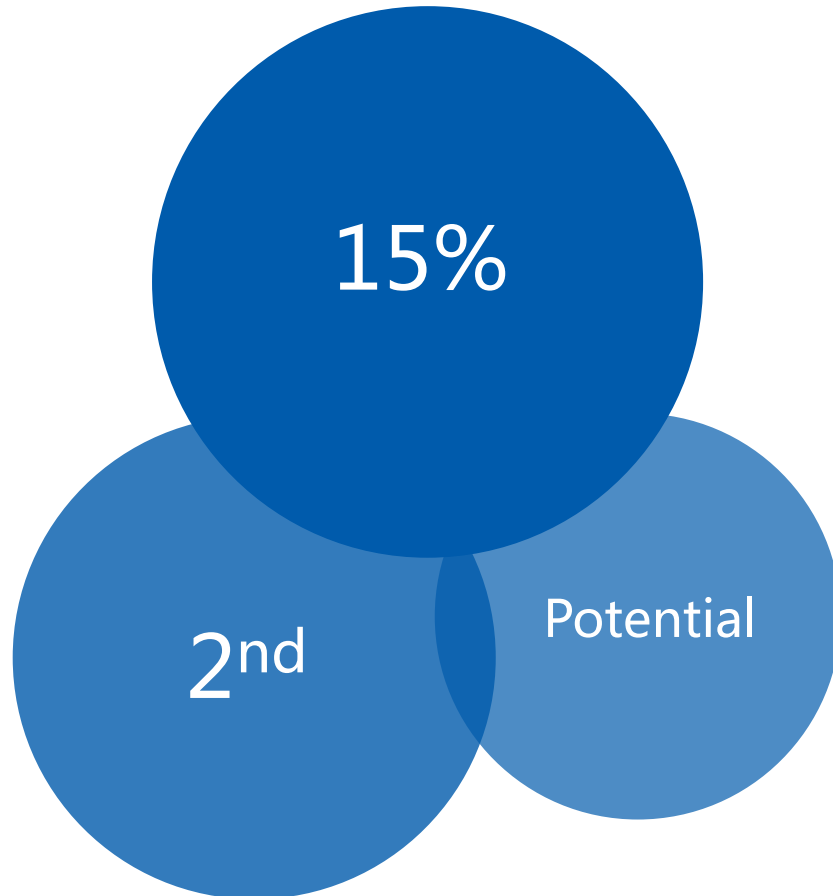
**About US**

**Chapter2**

**The Current Situation**

# The Current Situation of MD Industry in China

## Chapter 2



### Increasing Fast

15%

- Annual growth rate stays around 15% since 2001.

### Great Market

2<sup>nd</sup>

- Output value is over 500 billion CNY till 2015. China has become the 2<sup>nd</sup> largest market in the world.

### More Innovative Devices

Potential

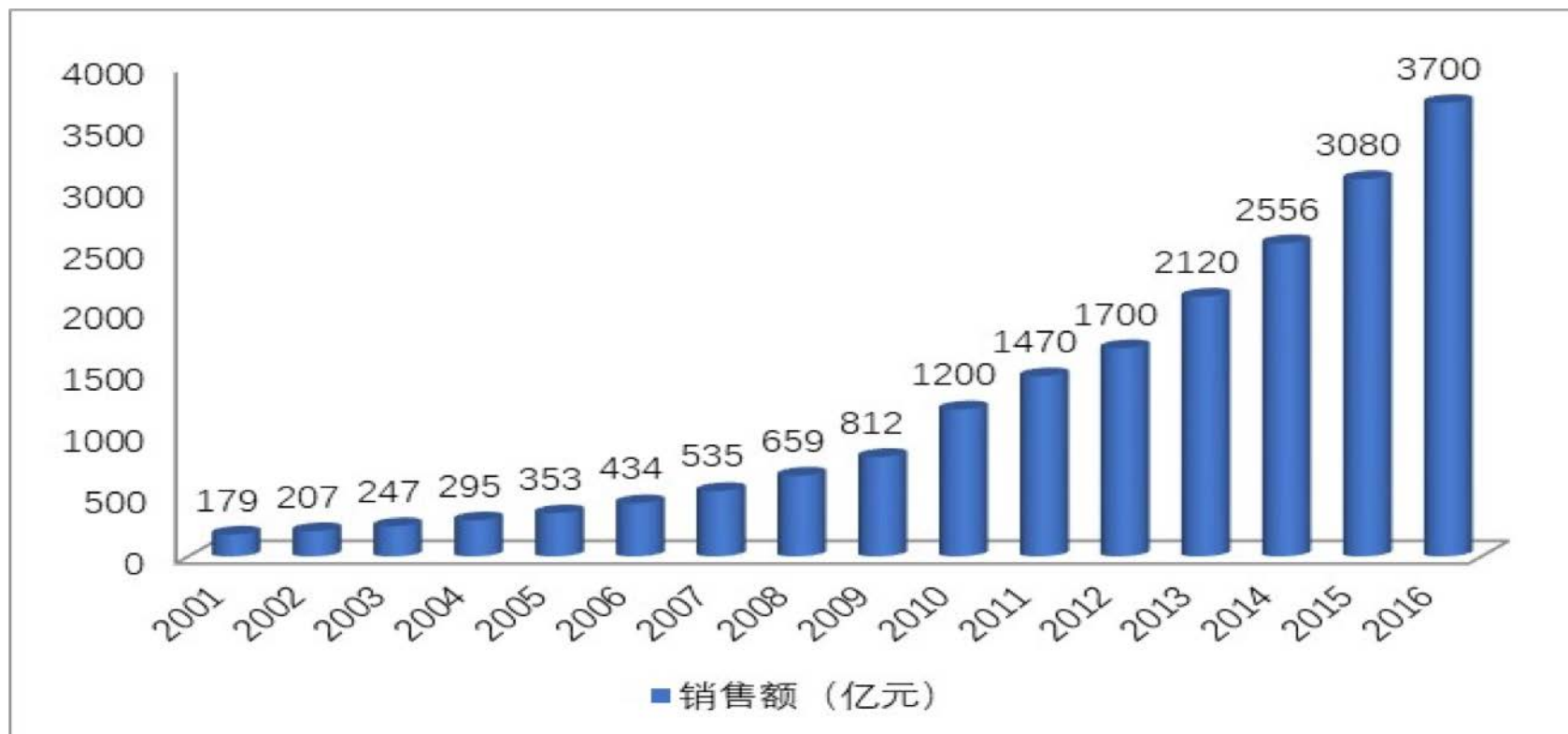
- More domestic manufacturers focusing on promoting technology and innovating.
- Great need of health care.

# The Current Situation of MD Industry in China

## Chapter 2

### Market Scale of Medical Devices

It grows from 17.9 billion CNY in 2001 to 370 billion CNY in 2016, with an annual average growth rate of around 15%.



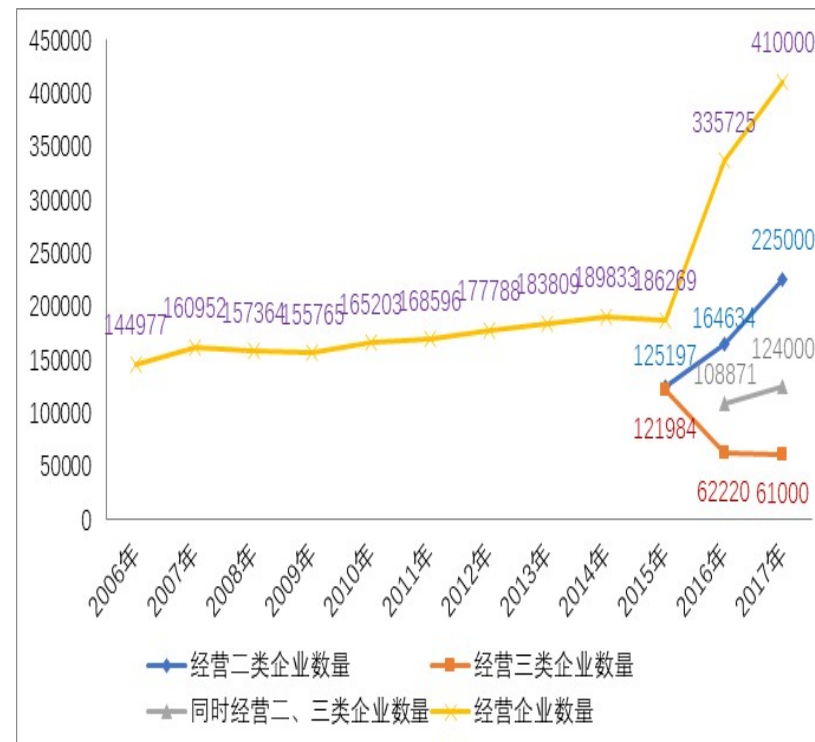
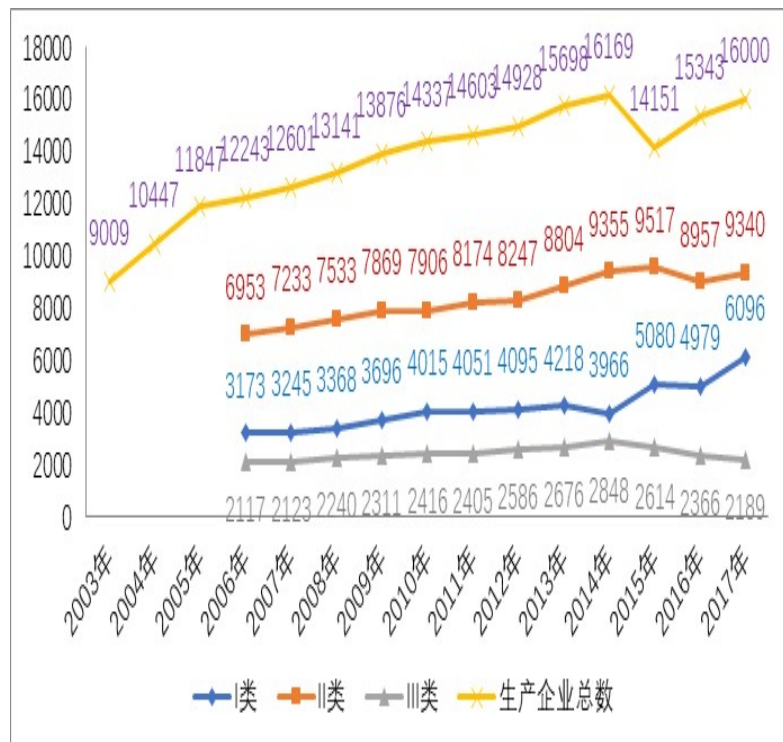
# The Current Situation of MD Industry in China

## Chapter 2

### Numbers of China Medical Devices Manufactures

16,000 manufacturers, including 6,096 Class I enterprises, 9,340 Class II enterprises and 2,189 Class III enterprises

410,000 medical device business enterprises with operating license (Class II and Class III)



# The Current Situation of MD Industry in China

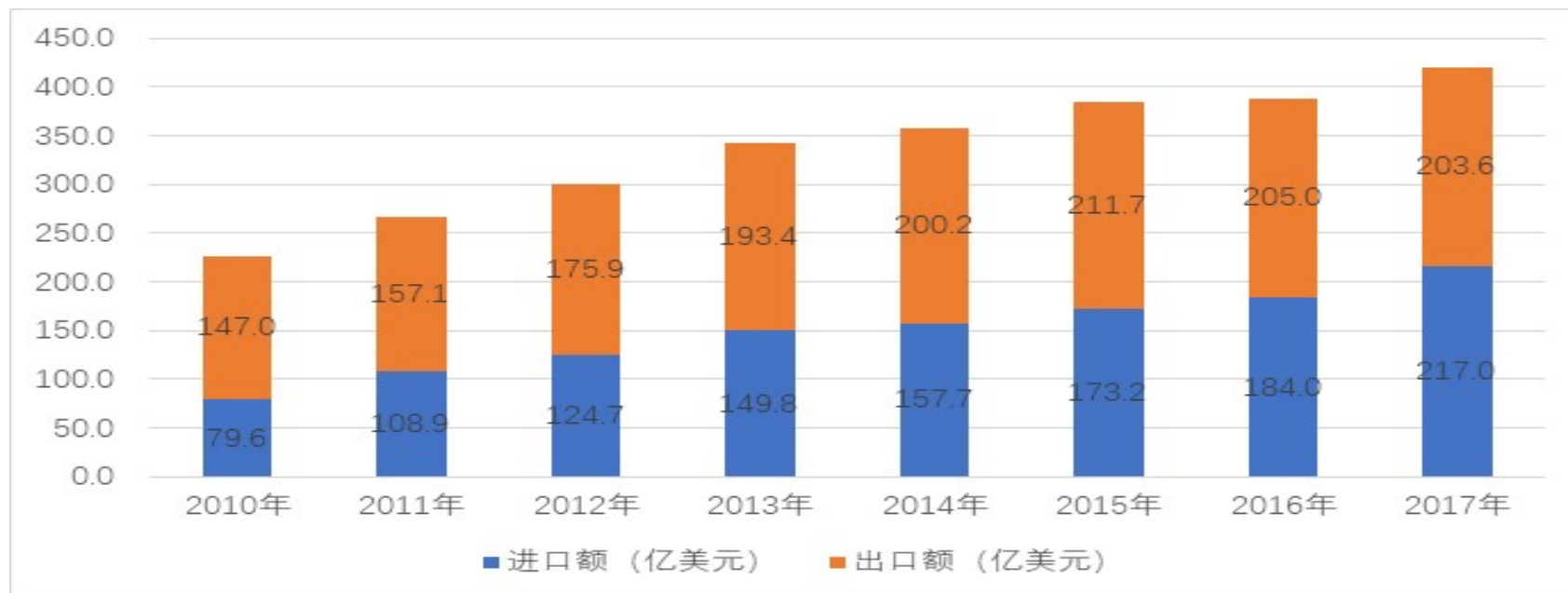
## Chapter 2

### Import and Export

In 2017, the total trade of medical devices in China is amounted to 42.1 billion dollars (8.1%)

the total value of imports is amounted to 20.4 billion dollars with a year-on-year growth rate of 10.3%

the total value of exports is amounted to 21.7 billion dollars with a year-on-year growth rate of 5.8%



# The Current Situation of MD Industry in China

## Chapter 2

### 2017 China Medical Devices Industry Output Value

Above-scale Sample Enterprises According to the Statistics by the MIIT

Industry	main operating income (in CNY billion)	YoY (%)
Medical instruments and equipment manufacturing	282.81	10.7
Sanitary materials and medical supplies manufacturing	226.68	13.5
Total	509.49	12.1

Industry output value calculated by CAMDI: over CNY 500 billions

# The Current Situation of MD Industry in China

## Chapter 2

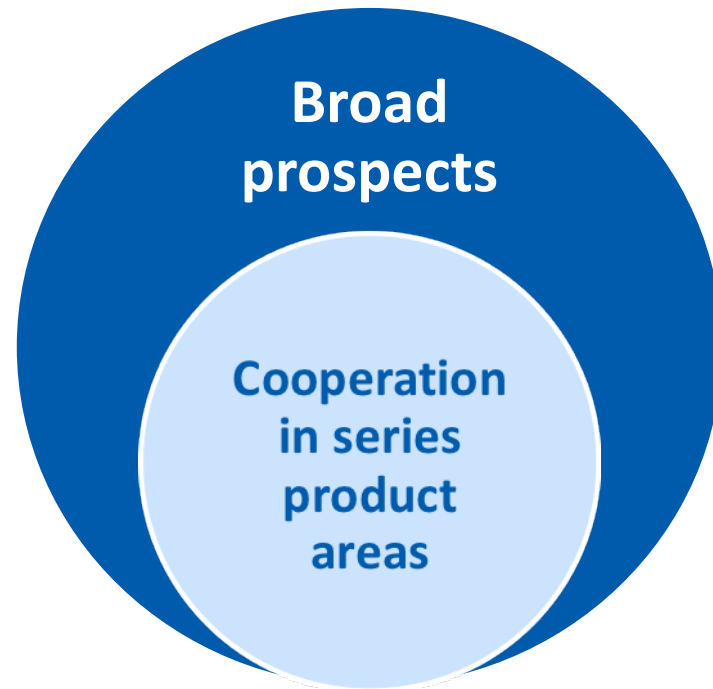
### Space of industrial development

	Developed country	China
Medical industry accounts for GDP	More Than 10%	Less Than 5%
Medical devices market versus Drug market	About 1:1	About 1:3~4
Global market share	72% (US,Europe,Japan)	About 14%
Domestic market share	70%	30%
Market concentration	Higher	Lower
GPO	Higher	Lower

# The Current Situation of MD Industry in China

## Chapter 2

Prospects of Chinese and foreign companies cooperation







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THANK  
YOU!

Yang Xiaofang  
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