

Malaysia Healthcare Industry Report - H1, 2013

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Abstracts

Under the 10th Malaysia Plan (2011–2015), the government has identified healthcare services as one of the 12 National Key Economic Areas (NKEA) to generate revenue for the country. Malaysia now has 8 Joint Commission International (JCI) and 24 Malaysia Society for Quality in Health (MSQH) accredited hospitals, with another 31 hospitals and ambulatory care facilities in the process of becoming accredited.

Market drivers such as rising middle and affluent income population, medical tourism, rise in chronic disease and aging and growing population will impact the healthcare services market, according to Frost & Sullivan. Conversely, market constraints such as medical personnel shortage, discrepancy between urban and rural regions and the inability to meet the demand of healthcare services in towns and rural areas will set the market back.

According to the World Bank health statistics, Malaysia's spending on healthcare was estimated at 4.4% of its GDP, with government expenditure accounting for 55% of total health expenditure. Private sector services mainly dominate the healthcare industry in Malaysia. Frost & Sullivan estimated the private healthcare sector to generate revenue of MYR 11bn in 2018 from MYR 7bn in 2012, growing at a CAGR of 8.4% during 2012–2018.

Besides, Malaysia is fast becoming the destination of choice for medical tourists behind Thailand and Singapore, driven by affordable costs, specialised hospitals, high-quality medical care and short waiting times. According to the Malaysian Healthcare Travel Council (MHTC), the number of foreign patients seeking medical treatment in Malaysia would expand from the current 600,000 in 2012 to 2 million by 2020.

KPJ Healthcare Berhad is the largest private healthcare operator in the country with more than 2,600 beds across its hospitals or about 21% of the total private sector

capacity. The group also has the highest share of patient admissions and the largest number of medical personnel.

Key Points:

With rapid population growth and rising per capita incomes, Frost & Sullivan predicted Malaysia's private healthcare sector to expand from MYR 7bn in 2012 to MYR 11bn in 2018, growing at a CAGR of 8.4% during the period.

Despite low spending on healthcare at 4.4% of its GDP, Malaysia had the second-highest health expenditure per capita in the ASEAN region in 2012 at USD 518.

According to the MHTC, around 600,000 foreign patients seek medical treatment in Malaysia, generating revenue of nearly MYR 550mn in 2012. Indonesian patients remain as one of its major source, representing about 50% of the revenue and 70% of the arrivals.

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