

# China Health Examination Industry Overview, 2011-2020

<https://marketpublishers.com/r/C97AE940C27EN.html>

Date: July 2016

Pages: 30

Price: US\$ 1,800.00 (Single User License)

ID: C97AE940C27EN

## Abstracts

### Description

Health examination focuses on health in performing physical examination. Health examination, which belongs to prophylactic medicine, plays an important role in medical treatment industry to effectively save medical expenses. According to CRI estimation, the total available market of health examination was 380 million visits in 2015, achieving an increase of 94% over 2009, and the CAGR reached 11.69% up to 2015. The total visits of health examination accounted for less than 30% in the total population in China in 2015, leaving a large development space.

In recent years, with the development of economy and living standards in China, people's awareness of health are improved and the demand for health examination grow accordingly, which enhance the speedy and sustainable development of health examination market. From 2000, the resident medical treatment expenses per capita in China enjoy a substantial increase, and the medical treatment environment improves significantly, with the health examination market enjoying a rapid warming.

At present, there are many participants in examination industry market in China, including public hospitals, private professional medical centers, private hospitals, health centers and sanatoriums, etc. According to the market shares of various medical institutions, public hospitals account for about 70%, while private professional medical centers account for about 20%. Other medical institutions do not take examination services as their main business due to the different work divisions, finally forming a market structure with public hospitals as their main body and private professional medical centers as their complement. Presently, there are 7,000 to 8,000 professional examination institutions in total in the market. And among these professional institutions

several are in relatively large scale, such as Meinian Onehealth, iKang Healthcare Group, Rich Healthcare. The market concentration rate in physical examination industry in China is quite low, with CR5 less than 6% by sales revenue. The main reason lies in that public hospitals can bring confidence to the consumers with their years of brand, medical treatment personnel, and level of expertise. However, currently, there are a limited number of examination visits that examination sectors can accept in public hospitals, and the service level declines, for which the professional examination institutions get opportunities.

At present, domestic professional examination institutions are mainly distributed in first-tier cities such as Beijing, Shanghai, and Guangzhou as well as some second-tier cities. These institutions specialize in health examination services with strong market senses, advantages of professionalization in physical examination, marketization in operating and flexibility in operating mechanism, and objective conditions to grow up rapidly.

With the growth in living standards, health awareness and demand for health examination in China, there will be a further increase in the supply for professional health examination market. With the exclusive advantage that public hospitals do not possess, professional examination institutions are likely to enjoy more market shares of health examination. It is estimated that the proportion of professional examination institutions in health examination market will rise year on year.

Due to the relatively low market concentration rate of health examination market in China together with the low barriers to entry, there is a trend that leading companies continue to perform mergers and expansions with their capital strength in recent years. According to CRI estimation, the market value of health examination was approximately CNY 80 billion in China in 2015. It is estimated to preserve a growth rate of over 10% each in the next few years.

Through this report, the readers can acquire the following information:

Definition and Classification of the Health Examination

Parameters and Assumptions of the Report

Competition Status of Health Examination Industry in China

Top 5 Enterprises in Health Examination Industry in China

Major Development Opportunities and Driving Forces faced by Health Examination Industry in China

Risks and Challenges in the Development of Health Examination Industry in China

Analysis on Major Operation Cost in Health Examination Industry in China

Trend of Charge Standards in Health Examination in China

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