

# Research Report on China's High-end Medical Treatment Industry, 2013-2017

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## Abstracts

In recent years, the market size of China's medical services continuously expands, but whole medical services are on the rather low level. The rich and foreigners in China attach importance to quality and privacy of medical services and they are unwilling to accept the noisy and crowded hospital environment and inferior service attitudes of public hospitals. Insensitive to prices or enjoying high-end medical insurances, they can afford high medical expenses.

In current China, high-end medical services are carried out through three primary channels: high-end general hospitals (clinics), high-end specialized hospitals (clinics) and high-end service departments of public hospitals. In the general hospital industry, there are hundreds of high-end medical institutions in economically-developed cities such as Shanghai and Beijing. Among them, there are some hospitals sharing doctors of public hospitals and high-end service departments managed by foreign-funded medical institutions under entrustment of public hospitals. The thresholds of high-end specialized hospitals are rather low, especially rapidly-developing specialized hospitals for eyes, dentistry and women and children in China. The growth rate of China's high-end medical market size is rapid. Meanwhile, problems such as the high flow rate of doctors and insufficient supply exist. For example, the current market capacity of Shanghai's high-end medical services is over CNY 10 billion, but the actual revenue is less than CNY 4 billion annually. Many effective demands remain to be satisfied.

Multiple high-end services of public hospitals early develop in China— including official healthcare, international services, general special medical treatment, etc. However, doctors are shared by high-end and common medical treatments in several public hospitals. Aiming at special crowds, the high fee, prior appointment and preferential treatment cause dissatisfaction of common patients. Moreover, high fees, poor services

and other problems arouse controversy. In the long term, the development prospect of high-end services in public hospitals is bleak.

In China, the convenient service and comfortable environment are main reasons which initially attract patients to head for high-end medical institutions. Because barriers to entry of dental, eye, physical examination, gynaecology and other fields are rather low and the high-end specialized medical treatment is easier to create characteristics through equipment, technologies and services, China's high-end medical services are concentrated in these fields. However, investments in general hospitals are high and their competitiveness is hard to be exceeded compared with common hospitals, so high-end general hospitals are scarce in current China.

Compared with eyes, dentistry, physical examination, gynaecology, etc., there are a few high-end specialized hospitals in China's tumors, cardiovascular diseases, rehabilitation medical treatment and other fields, and the market demand is on the continuous rise.

With the expansion of China's high-end medical service market, some foreign-funded medical institutions accelerate the expansion in China. Meanwhile, the high-end trend of some private medical institutions is evident. As for industrial policies, the policy of "doctors' practices in many places" and easing policies of Chinese government for investment in medical institutions of foreign capital, etc. are beneficial to the development of the industry.

On the whole, service targets and contents of China's high-end medical treatment are gradually diversified. Target customers of China's high-end medical institutions gradually shift from the major officials and foreigners working in China to domestic non-official high-income groups. With the development of China's economy, there are hundreds of millions of people with the annual household income of over CNY 100 thousand, which boosts the development of China's high-end medical industry.

Malignant tumors, heart diseases and cerebrovascular diseases become the top 3 diseases causing the death of China's urban citizens. These diseases need to be patiently treated in the long term. It is obvious that the common medical industry monopolized by public hospitals is difficult to effectively meet the demand of medium and high-income patients. Therefore, the prospect of high-end medical services is promising. Although the whole market size of China's high-end medical treatment is less than CNY 100 billion in 2012, the figure is predicted to surmount CNY 200 billion by 2017. In the coming years, the annual growth rate of market size of China's high-end medical treatment will be far higher than that of the whole medical market.

More following information can be acquired through this report:

Current Supply and Demand of China's High-end Medical Services

High-end Medical Services in Dental, Eye, Physical Examination and Other Fields

Competition in China's High-end Medical Industry

Introduction of Major High-end Medical Enterprises in China

Development Trends and Investment Opportunities of China's High-end Medical Industry

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