Research Report on Chinese Medical Industry, 2009

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Abstracts

In China, the medical organizations refer to the organizations received Practice License of Medical Institution, mainly including the specialized diagnostic and curative hospitals, health centers, convalescent hospitals, out-patient clinics, clinics, hygiene centers and first-aid stations etc.

The medical organizations in China belong to service industry, directly faced to numerous consumers and supervised by medical executive departments of Chinese government. The regional distributions of Chinese hygiene resources are comparatively balanced, regional distribution disparity mainly showing in the levels of medical organizations, asset scales, revenues and expenditures, private medical organization distribution and foreign funded medical distribution, reflecting the regional economic development differences. Chinese medical industry is mainly concentrated in Shanghai, Beijing, Guangdong and Zhejiang, accounting for most hygiene resources and higher level technologies.

In 2008, the total expenditures of Chinese medical industry were 1.22 trillion Yuan (174 billion USD), increasing by 8.2% of last year. The expenditures per capita were 915 Yuan (130 USD).

By the end of 2008, Chinese health organizations were about 300 thousand, in which hospitals were 19,701 (13,111 public hospitals), 40 thousand clinics, 28 thousand community health service centers, 3,020 maternity and child care centers, 3,560 centers for disease control and prevention and 2,591 health monitoring institutions. Compared with last year, the health organizations were increased by two thousand, with the increased numbers of community health service centers and health monitoring institutions and the reduction in hospitals, town clinics, maternity and child care centers and centers for disease control and prevention.

By the end of 2008, the total beds of Chinese medical organizations were 3.97 million, up by year on year 7.2%. Chinese medical technicians were 4.92 million, including 2.05 million licensed assistant doctors and registered nurses of 1.62 million, rising by 130 thousand of Chinese medical technicians, 40 thousand of licensed assistant doctors and 80 thousand of registered nurses compared with the year of 2007. The licensed assistant doctor number per one thousand was increased from 1.54 in 2007 to 1.55 in 2008, as well as the registered nurse number from 1.18 to 1.22. The county doctors and health workers were 1.06 per one thousand agricultural populations.

In 2008, it was predicted that the outpatient visits in Chinese hospitals reached to 1.69 billion man-times, including 1.53 billion man-times in public hospitals, accounting for 90.5%. The inpatient number was 68 million, including 62.3 million in public hospitals, accounting for 91.5%.

For a long time, Chinese medical systems were state-governed, lack of competition and vigor, co-existences of shortage and surplus in resource allocation, low service quality and inefficiency. Thus, the reforms in medical systems fell far behind than other industries. Since, 2000, Chinese government approved the guidelines of medical system reforms and carried out classified regulation in the medical organizations. The perspectives of medical organization market came into open.

Because of the promising perspectives, Chinese private and joint hospitals were established recently.

Chinese government guided and encouraged the entry of private and other assets into medical organizations by two means: first, asset acquisition, that is the participation of property right and operation means reforms in public hospitals, the acquisition of original stored assets; second, the added investment, that is the direct participation in the investment in the medical industry, constructions and operations, in which asset acquisition accounted for the most.

It is a long time to receive profits in a newly built hospital, at least five years. But if you merged with the present hospitals, the time will be shortened sharply, some of which will keep balance in the revenues and expenditures because of the fixed doctors, nurses and patients in the former hospitals.

The works of Chinese medical service systems will be divided rationally in the future among the community health service centers, comprehensive hospitals and the specialized hospitals, with the community health service centers specializing in the prevention, health care, health education, birth control and easily diagnose chronic disease treatment and rehabilitation of common diseases and frequently-occurring diseases, the comprehensive hospitals and the specialized hospitals specializing in the disease diagnostics. The large hospitals will mainly diagnose the critical illness and difficult or complicated illness and develop education and research combining clinical experiments.

More following information can be obtained in this report:
- Development of Chinese Medical Industry
- Sub-sectors of Chinese Medical Industry
- Value Chains of Chinese Medical Service Industry
- Competitions of Chinese Medical Industry
- Investment Opportunities of Chinese Medical Industry
- Trends of Chinese Medical Industry
- Influences of International Financial Crisis on Chinese Medical Industry

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