



# China Medical Informatization Industry Report,2013-2016

Apr. 2014

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Under the impetus of multiple favorable policies and market demand, China's medical informatization industry has entered a rapid development stage in recent years. As of the first half of 2013, management information system has been basically established in China's first- and second-class hospitals, where the clinical management information system construction has also got into the late stage, some have embarked on regional healthcare information system.

However, with a shortage supply of funds and resources, most third-class or lower-level Chinese hospitals are still in the construction phase of management information system, and some are only getting started.

According to CHIMA's sampling survey on 1,067 hospitals nationwide, as of the first half of 2013, hospitals where in-patient nurse workstation system, ward doctor workstation system and out-patient doctor workstation system have been established represent the largest proportion, respectively 69.0%, 59.1% and 51.6%, while those with intensive care information system and clinical decision support

system account for the minimum i.e. 13.0% and 14.0%, respectively.

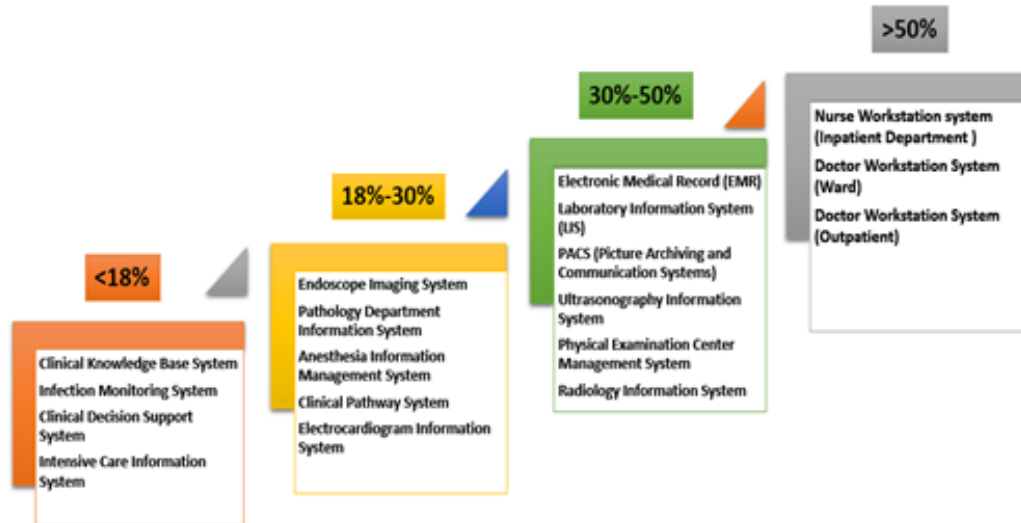
China's healthcare IT market size grew at a CAGR of 21.7% in 2007-2012, reaching RMB20.6 billion in 2013. According to the NHFPC's 12th-Five-Year Informatization Promotion Arrangements, China's medical informatization construction carried out in 2012-2013 is principally a gradual "point-to-area" process, followed by a comprehensive promotion in 2014-2015. It is expected that its healthcare IT market size will grow at a CAGR of about 25% in 2013-2016.

With low concentration, there is a small number of cross-regional national healthcare software enterprises in the Chinese medical informatization market, and mainly dominated by domestic-funded enterprises such as Winning Software, Neusoft Group, DHC Software and Tianjian Technology on account of localization issues, early-stage disorderly competition, etc..

China Medical Informatization Industry Report, 2013-2016 by ResearchInChina focuses on the followings:

- ✘ Development environment and relevant policies of China's medical informatization industry;
- ✘ Development status, market size, competition pattern, development trend and market size forecast of China's medical informatization industry;
- ✘ Operation, development strategy, etc. of 10 key companies in China.

## Medical Informatization Construction in China's Hospitals, by the End of 2013H1



Note: The percentage is calculated according to sample hospitals equipped with related information systems.

Source: CHIMA , ResearchInChina

### 1. Overview of Medical Informatization Industry

- 1.1 Definition
- 1.2 Classification

### 2. Status Quo of Global Medical Informatization Industry

- 2.1 Development History
- 2.2 Major Countries
  - 2.2.1 USA
  - 2.2.2 UK
  - 2.2.3 Japan
  - 2.2.4 Canada

### 3. Status Quo of China Medical Informatization Industry

- 3.1 Development History
- 3.2 Medical Services
  - 3.2.1 Disproportionate Allocation of Healthcare Resources
  - 3.2.2 Low Efficiency of Medical Resources
  - 3.2.3 Healthcare Spending
- 3.3 Relevant Policies
- 3.4 Status Quo
  - 3.4.1 Medical Informatization Construction
  - 3.4.2 Medical Informatization Project Construction in Various Regions
- 3.5 Market Size
- 3.6 Competition Pattern
- 3.7 Trends

- 3.7.1 Increase in Market Concentration
- 3.7.2 Construction of Regional Medical Informatization Platform
- 3.7.3 Mobile Medical System
- 3.7.4 IT Giants to Assist Help in Medical Informatization Construction
- 3.7.5 System Security to Be the Top Concern

### 4. Key Enterprises

- 4.1 Winning Software
  - 4.1.1 Profile
  - 4.1.2 Operation
  - 4.1.3 Revenue Structure
  - 4.1.4 Gross Margin
  - 4.1.5 R&D and Investment
  - 4.1.6 Medical Informatization
  - 4.1.7 Forecast and Outlook
- 4.2 DHC Software
  - 4.2.1 Profile
  - 4.2.2 Operation
  - 4.2.3 Revenue Structure
  - 4.2.4 Gross Margin
  - 4.2.5 Medical Informatization
  - 4.2.6 Forecast and Outlook
- 4.3 Neusoft
  - 4.3.1 Profile
  - 4.3.2 Operation
  - 4.3.3 Revenue Structure

- 4.3.4 Gross Margin
- 4.3.5 Neusoft Medical
- 4.4 Wonders Information
- 4.5 Yonyou Software
- 4.6 Enjoyor
- 4.7 YLZ
- 4.8 Kingdee
  - 4.8.1 Profile
  - 4.8.2 Operation
  - 4.8.3 Revenue Structure
  - 4.8.4 Gross Margin
  - 4.8.5 Kingdee Medical Software Technology Co., Ltd.
- 4.9 Others
  - 4.9.1 Tianjian Technology
  - 4.9.2 ZLSOFT

### 5. Summary and Forecast


- 5.1 China Healthcare IT Market Size
- 5.2 Comparison of Business Operation
  - 5.2.1 Revenue
  - 5.2.2 Net Income
  - 5.2.3 Gross Margin
  - 5.2.4 R&D Input

- Classification of Medical Informatization
- Classification, Function and Subsystem of Medical Informatization in a Narrow Sense
- Medical Expenditures in the United States, 1970-2011
- Healthcare IT Investment in the United States, 2001-2013
- Medical Expenditures in Japan, 1985-2011
- Number of Medical and Health Organizations in China, 2012-2013
- Number of Beds in Chinese Medical and Health Organizations, 2011-2012
- Bed Usage in Chinese Health Authorities, 2012-2013
- Amount of Medical Services Offered by Chinese Health Authorities, 2012-2013
- Treatment Process in a Chinese Hospital
- Medical Informatization Program for Alleviating Difficulty in Seeing Doctor
- China's Health Expenditure Per Capita, 1980-2011
- China's Health Expenditure and % of GDP, 1980-2011
- Relevant Policies for Medical Informatization in China, 2006-2013
- Construction Vendors and Starting Time for Regional Medical Pilots in China, 2010-2012
- Procedures for China's 12th-Five-Year Medical Informatization Promotion
- Status and Target Gap of China's 12th-Five-Year Medical Informatization Construction, 2012
- Status of Hospital Information System Construction in China, 2013H1
- Main Obstacles in Chinese Hospital Information Construction, 2013
- Developments of Solutions Market for China Medical Informatization Systems, 2010-2015E
- Purchase Amount and Project Number of Medical Informatization Procurement around China
- China's Healthcare IT Market Size, 2007-2012
- Market Share of Major Medical Solution Providers in China, 2009
- Related Business of Major Listed Medical Information Companies in China
- Main Product Categories and Sub-products of Winning Software
- Revenue and Net Income of Winning Software, 2009-2013

- Status of Hospital Information System Construction in China, 2013H1
- Main Obstacles in Chinese Hospital Information Construction, 2013
- Developments of Solutions Market for China Medical Informatization Systems, 2010-2015E
- Purchase Amount and Project Number of Medical Informatization Procurement around China
- China's Healthcare IT Market Size, 2007-2012
- Market Share of Major Medical Solution Providers in China, 2009
- Related Business of Major Listed Medical Information Companies in China
- Main Product Categories and Sub-products of Winning Software
- Revenue and Net Income of Winning Software, 2009-2013
- Revenue Structure of Winning Software by Product, 2009-2013
- Revenue Structure of Winning Software by Region, 2009-2013
- Gross Margin of Winning Software, 2009-2013
- Gross Margin of Winning Software by Product, 2009-2013
- R&D Costs and % of Total Revenue of Winning Software, 2010-2013
- Committed Fund-raising Projects of Winning Software as of 2013
- Revenue and Net Income of Winning Software, 2012-2016E
- Revenue and Net Income of DHC Software, 2009-2013
- Revenue Structure of DHC Software by Product, 2009-2013
- Revenue Structure of DHC Software by Sector, 2013
- Revenue Structure of DHC Software by Region, 2009-2013
- Gross Margin of DHC Software, 2009-2013
- Gross Margin of DHC Software by Sector, 2009-2013
- Gross Margin of DHC Software by Product, 2009-2013
- Revenue and Net Income of DHC Software, 2012-2016E
- Revenue and Net Income of Neusoft, 2009-2013

- Revenue Structure of Neusoft by Sector, 2009-2013
- Gross Margin of Neusoft Group, 2009-2013
- Gross Margin of Neusoft Group by Product, 2009-2013
- Revenue of Neusoft Medical, 2009-2013
- Forecast: Revenue of Neusoft Medical, 2012-2016E
- Revenue and Net Income of Wonders Information, 2009-2013
- Revenue Structure of Wonders Information by Product, 2009-2013
- Gross Margin of Wonders Information, 2009-2013
- Gross Margin of Wonders Information by Product, 2009-2013
- R&D Costs and % of Total Revenue of Wonders Information, 2009-2013
- Revenue and Net Income of Wonders Information, 2012-2016
- Revenue and Net Income of Yonyou Software, 2009-2013
- Gross Margin of Yonyou Software, 2009-2013H1
- R&D Costs and % of Total Revenue of Yonyou Software, 2011-2013
- Revenue and Net Income of Enjoyor, 2009-2013
- Revenue Structure of Enjoyor by Product, 2009-2013
- Gross Margin of Enjoyor, 2009-2013H1
- Gross Margin of Enjoyor by Product, 2009-2013
- R&D Costs and % of Total Revenue of Enjoyor, 2010-2012
- Revenue and Net Income of Enjoyor, 2012-2016E
- Revenue and Net Income of YLZ, 2009-2013
- Revenue Structure of YLZ by Product, 2009-2013
- Gross Margin of YLZ, 2009-2013
- Gross Margin of YLZ by Product, 2009-2013



- 
- R&D Costs and % of Total Revenue of YLZ, 2010-2012
  - Revenue of YLZ, 2012-2016E
  - Revenue and Net Income of Kingdee, 2009-2013
  - Revenue Structure of Kingdee by Product, 2009-2013
  - Gross Margin of Kingdee, 2009-2013
  - China's Healthcare IT Market Size, 2012-2016E
  - Comparison: Revenue of Major Listed Medical Information Companies in China, 2009-2013
  - CAGR of Major Listed Medical Information Companies in China, 2009-2012
  - Comparison: Growth in Annual Revenue of Major Listed Medical Information Companies in China, 2010-2013
  - Comparison: Net Income of Major Listed Medical Information Companies in China, 2009-2013
  - Comparison: Growth in Net Income of Major Listed Medical Information Companies in China, 2010-2013
  - Gross Margin of Major Listed Medical Information Companies in China, 2009-2013
  - R&D Inputs of Major Listed Medical Information Companies in China, 2010-2013
  - Comparison: R&D Cost as Percentage of Revenue of Major Listed Medical Information Companies in China, 2010-2013

**You can place your order in the following alternative ways:**

1. Order online at [www.researchinchina.com](http://www.researchinchina.com)
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: [report@researchinchina.com](mailto:report@researchinchina.com)
4. Phone us at +86 10 82600828/ 82601561

<b>Party A:</b>			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

<b>Party B:</b>			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	<a href="mailto:report@researchinchina.com">report@researchinchina.com</a>	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

**Choose type of format**

- PDF (Single user license) .....1,850 USD
- Hard copy ..... 1,950 USD
- PDF (Enterprisewide license)..... 2,850 USD

**※ Reports will be dispatched immediately once full payment has been received. Payment may be made by wire transfer or credit card via PayPal.**

### About ResearchInChina

ResearchInChina ([www.researchinchina.com](http://www.researchinchina.com)) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

### Our Major Activities

- *Multi-users market reports*
- *Database-RICDB*
- *Custom Research*
- *Company Search*

**RICDB** (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at [www.researchinchina.com](http://www.researchinchina.com)

For any problems, please contact our service team at: