



China Hospital Industry Report,2019-2025

May 2019

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

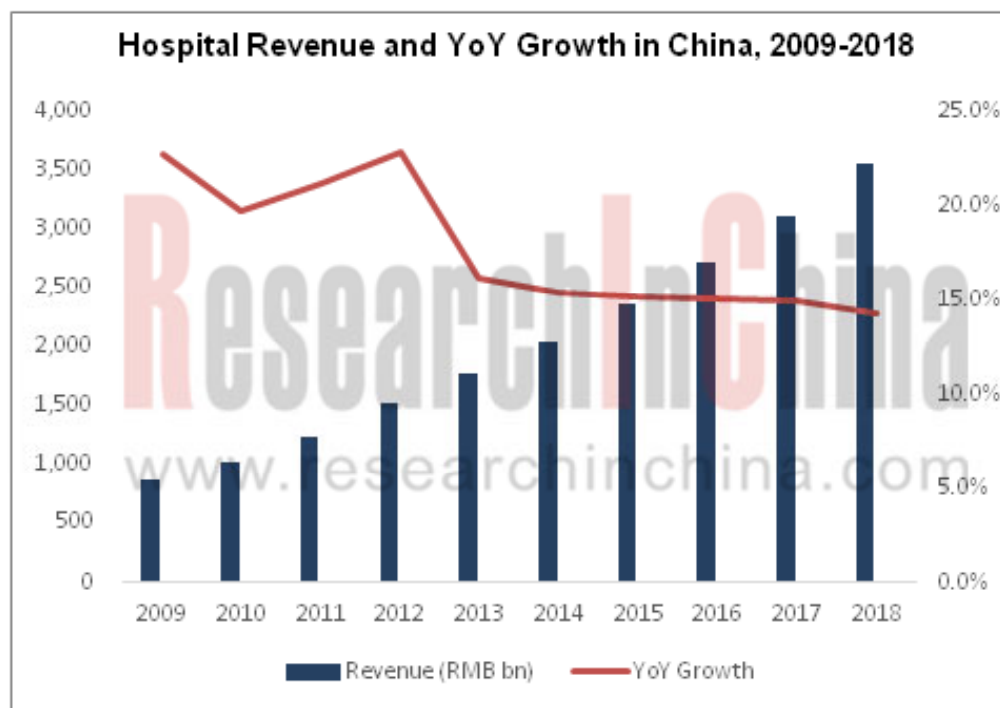
Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional 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

The people’s growing awareness of health care and the acceleration of population aging have brought prosperity to China’s hospital industry. As of February 2019, there had been a total of 33,000 hospitals in China, an increase of 1,866 on the same period of 2018. In the first two months of 2019, there were 550 million patient visits to hospitals in China, up 3.2% year on year. In 2018, Chinese hospitals registered revenue of roughly RMB3,554.3 billion, surging by 14.2% year on year.



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China's medical resources have soared as well. By the end of 2017, medical and health institutions had offered 7,940,300 beds, including 6,120,500 in hospitals, which meant 5.71 beds per 1,000 people, a figure that should number 6 (including for inpatients) in 2020, according to the Circular on Accelerating the Construction of Health and Old-age Service Project.

Also, China's medical security system has been improved. By the end of 2018, 1,344.52 million people, or over 95% of the country's total population had been covered by the basic medical insurance system, including 316.73 million urban employees, 4.5% more than in the previous year, 897.41 million urban and rural residents, a year-on-year increase of 2.7%, and 130.38 million rural residents who were under the new rural cooperative medical care system, a part of the basic medical insurance system.

Chinese hospitals are divided into public hospitals and private hospitals by economic type. Policies concerning reform of public hospitals, etc. have allured the inrush of social capital into medical care industry, leading to a surge in the number of private hospitals. As of February 2019, there had been 21,165 private hospitals in China, including 2,185 new ones compared with the same period of 2018 and accounting for 63.9% of the total number of hospitals.

Social capital largely flows to specialized hospitals which need low investment but produce high return on investment and are in demand. In China, over 65% of private hospitals are specialized hospitals. Revenue of Chinese specialized hospitals has been growing at a rate of 20% or so over the years, and currently outstrips RMB400 billion.

Among specialized hospitals, ophthalmic hospitals, stomatological hospitals and plastic surgery hospital are quite lucrative, all with a profit margin of above 10%. For example, Aier Eye Hospital, China's biggest ophthalmic hospital chain with over 290 outlets nationwide, in 2018 boasted 5.5 million outpatient visits and recorded RMB8.01 billion in revenue and RMB1.07 billion in net income, presenting a net margin of 13.3%.

China Hospital Industry Report, 2019-2025 highlights the following:

China hospital industry (number of hospitals, revenue, medical services, competitive pattern, forecast, prospect, etc.);

Chinese specialized hospitals (overview, analysis on specialized hospitals of all sorts, summary and forecast);

Chinese medical insurance system (status quo and development trend);

Investment in China hospital industry (related policies, comparison between public and private hospitals, investment fields of social capital, development directions and business models of foreign-funded hospitals);

16 companies (operation, hospital industry layout, forecast, etc.).

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