

China Healthcare Market

China Healthcare IT Industry

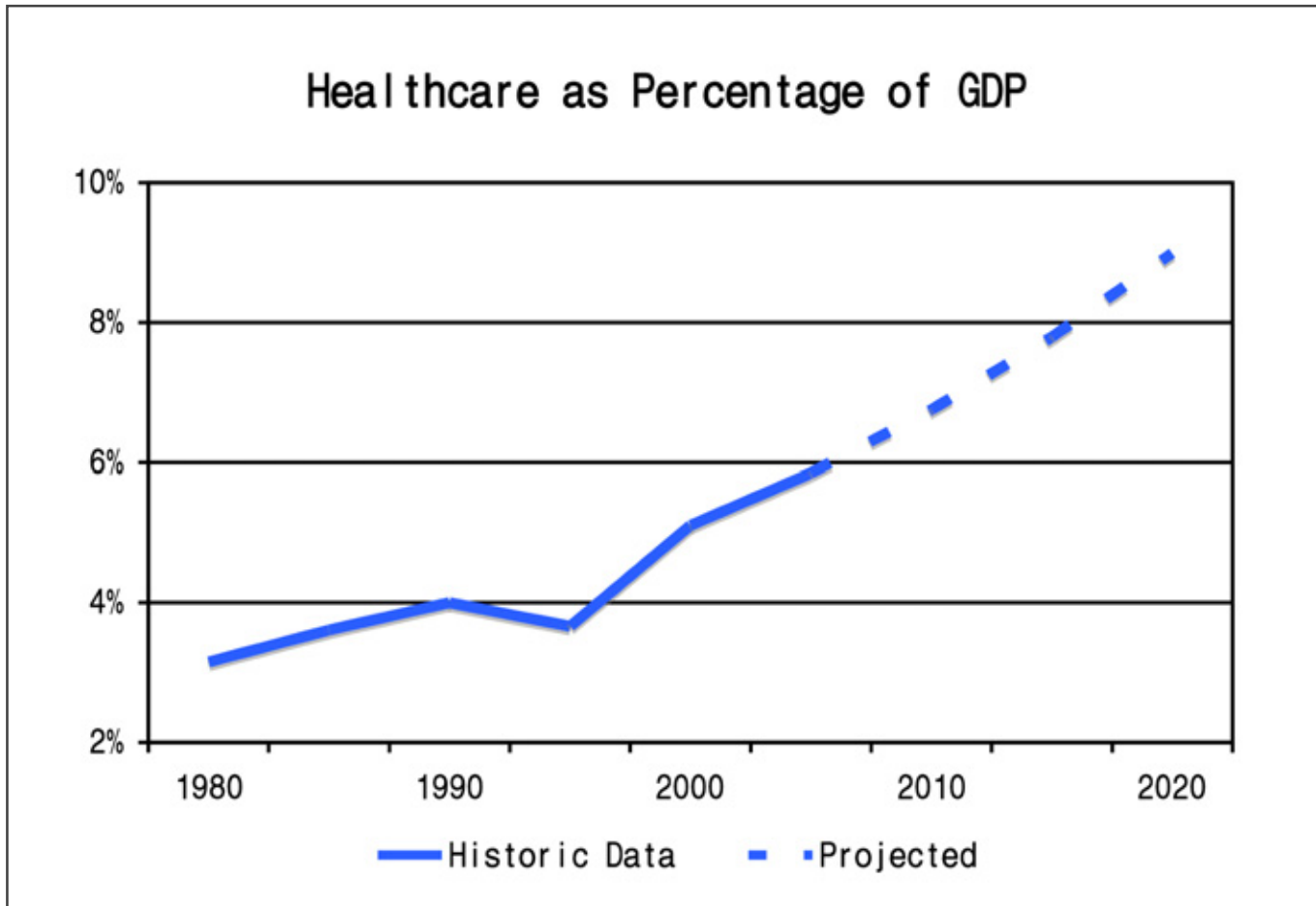
About UFIDA

presentation outline

China: the world's largest healthcare market

- **1.3 billion** people
- **2.2 billion** annual hospital visits
- **10.6%** annual health expenditures growth rate

And growing rapidly...



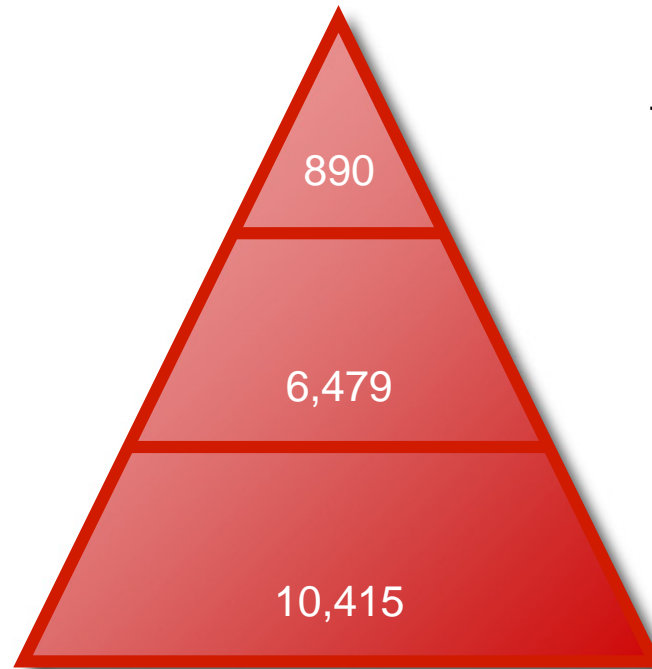
source: China Ministry of Health

Also the world's largest healthcare system

Tier 3: Large hospitals
(500+ beds)

Tier 2: Mid-sized hospitals
(100-500 beds)

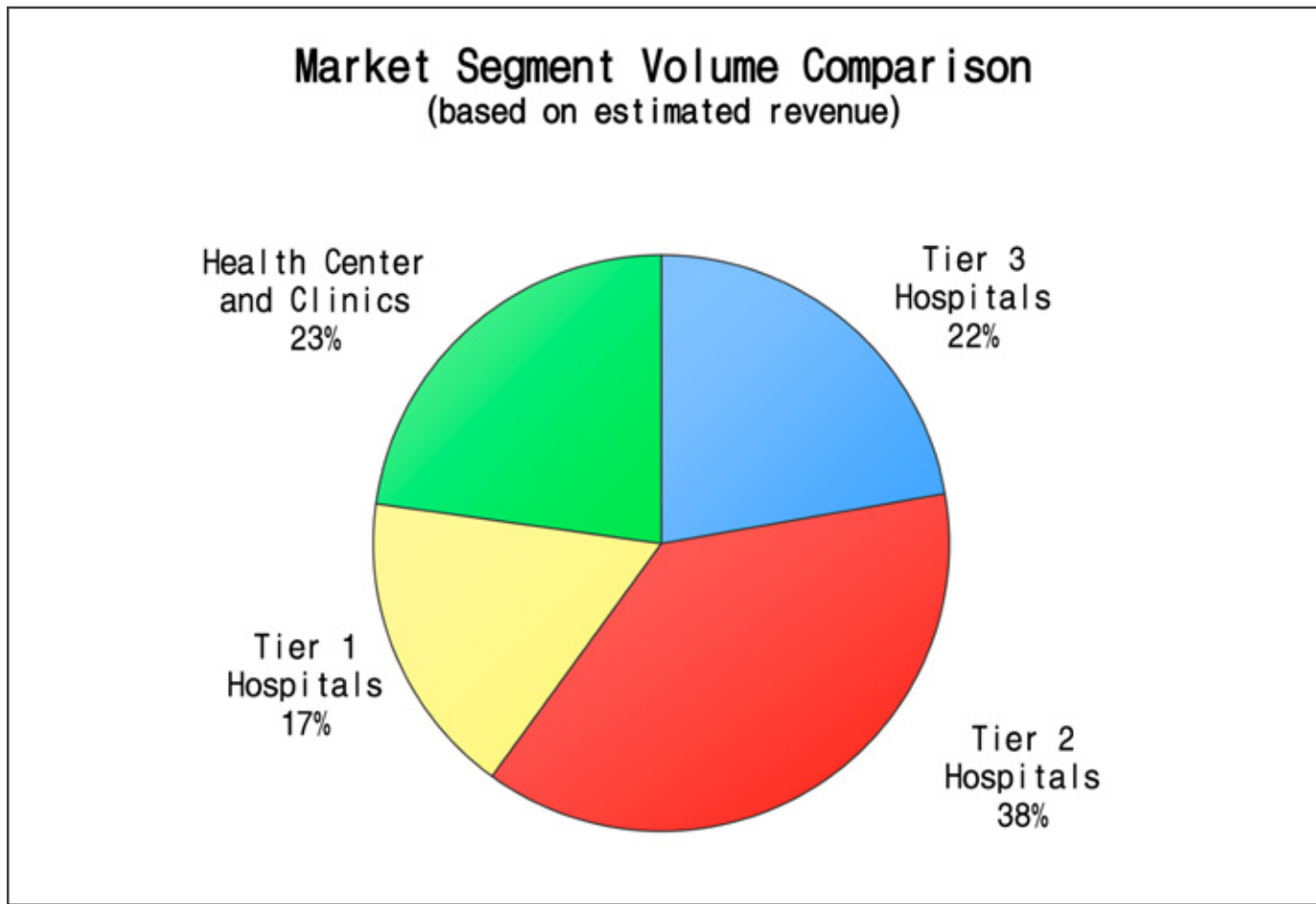
Tier 1: Small hospitals
(<100 beds)



total healthcare
institutions:
291,323

hospitals:
17,764

Market segment breakdown



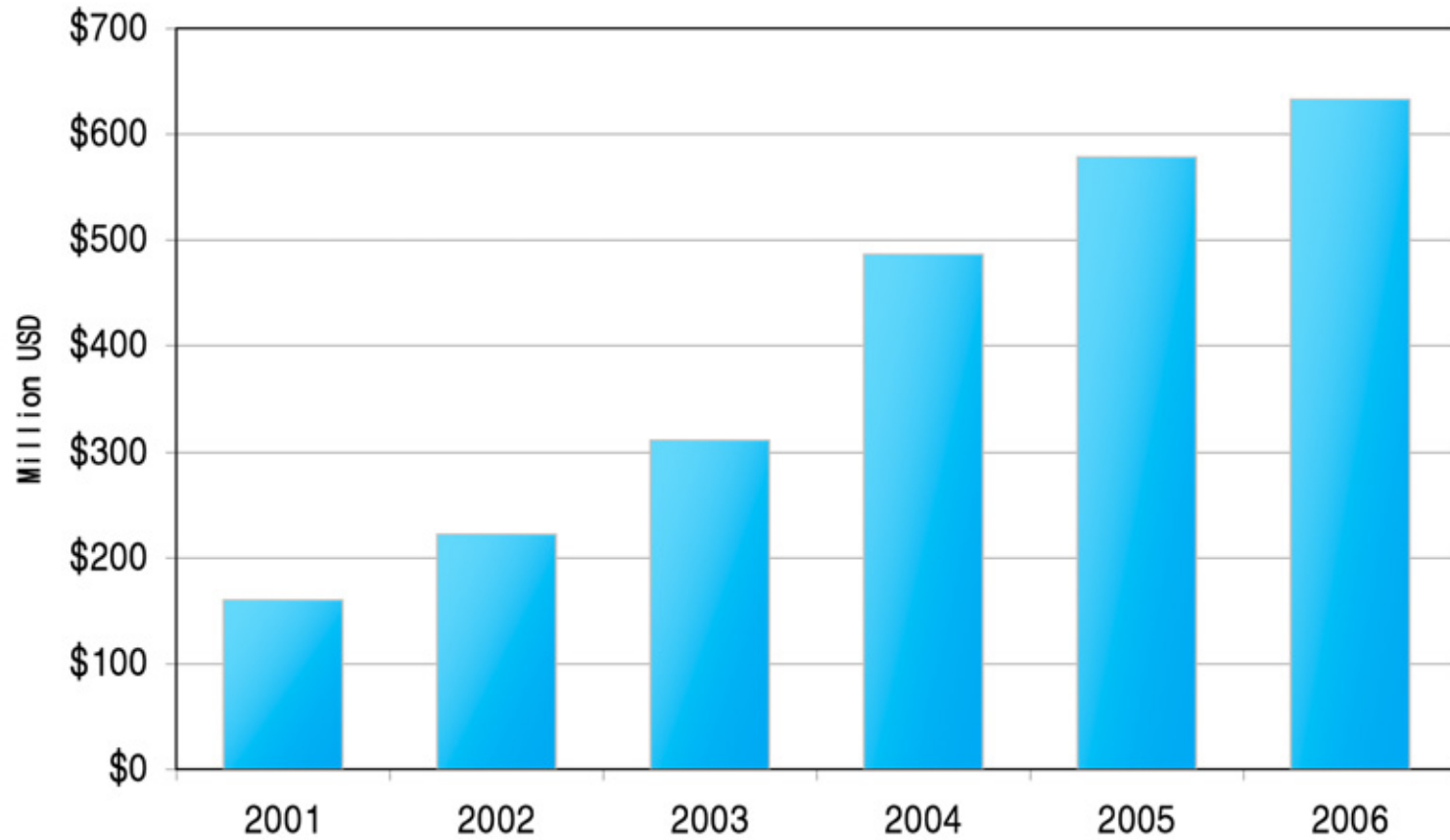
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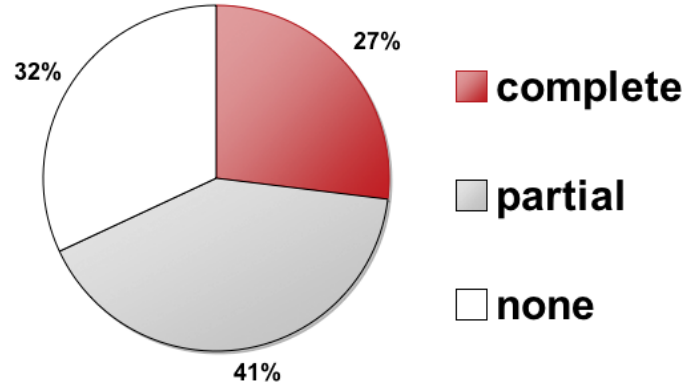
China Healthcare IT Industry Growth



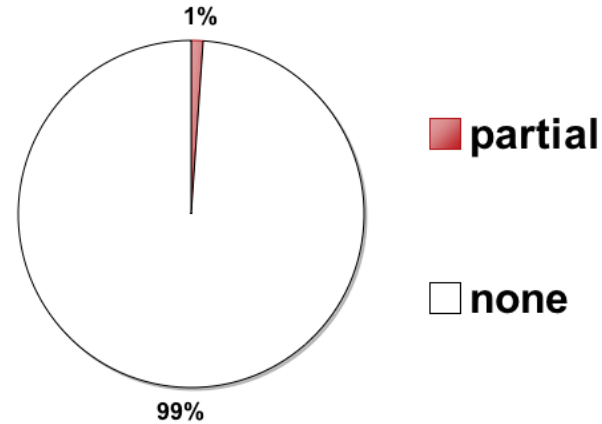
source: CCID

HIS Implementation Level

Hospital management information system (HMIS)



Hospital clinical information system (HCIS)

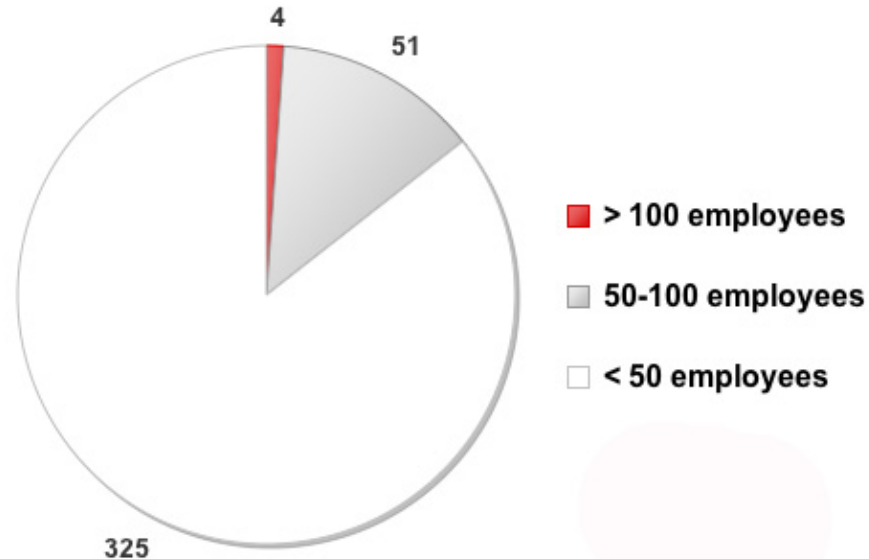


source: China Ministry of Health

Government Policy Driving HIS Demand

- **2000 - Healthcare Reform**
elimination of inefficient paper processes
- **2001 - Entry into WTO**
foreign competitors to enter market; Chinese hospitals must modernize information systems in order to compete
- **2002 - Hospital Information System Policy**
standardized HIS development and the creation of a nationwide healthcare information network

Domestic HIS Providers



380 companies have developed HIS solutions in response to the healthcare industry's rapid growth and government policy