

2025 易凯资本中国健康产业白皮书

核心观点篇

2025.05

2024

2023

13.3

1.8

3

1.2

9.1

2023

10.5-11

1.4-1.5





2024

2023

3

2023

1.4

10

2024

11.5-12

1.5-1.6

2023

9%-10%

20

2035

30

GDP

10%





		65%		5%	42%
		35%		28%	12
					40% 2024
	75		ω - 3		
	78%		26		
		30%		2024	234.2
2030	800				
		2023			
18		30	2024		196

AI

AI

6

AI

7000

58%

60

60%

2024

1.45

3-6

2024

38%

3

4.2

72%

+

20%

2024

823

152

671

6.1

OECD

15.3

1.8%

2024

32.7

12%

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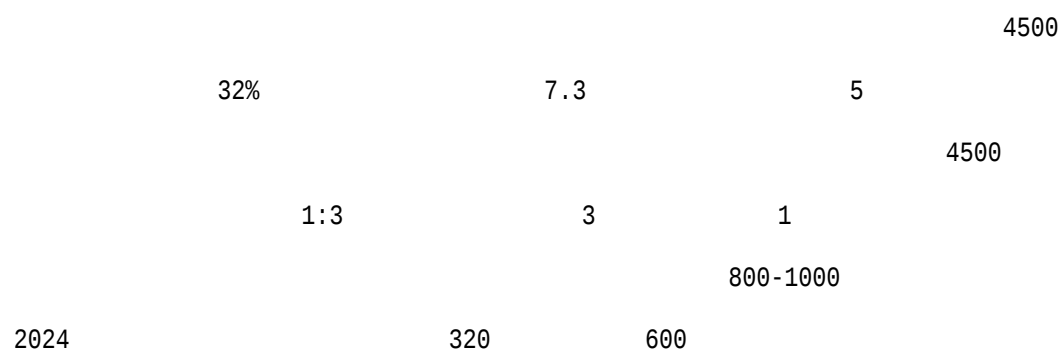
”

3-5

VR/AR

3D

AI



“ + ”

2

2025

50%

2033

30

26

440

+

+

3

AI

AI

AI

VitalConnect

2025

1

Zoe

3

AI

AI

"

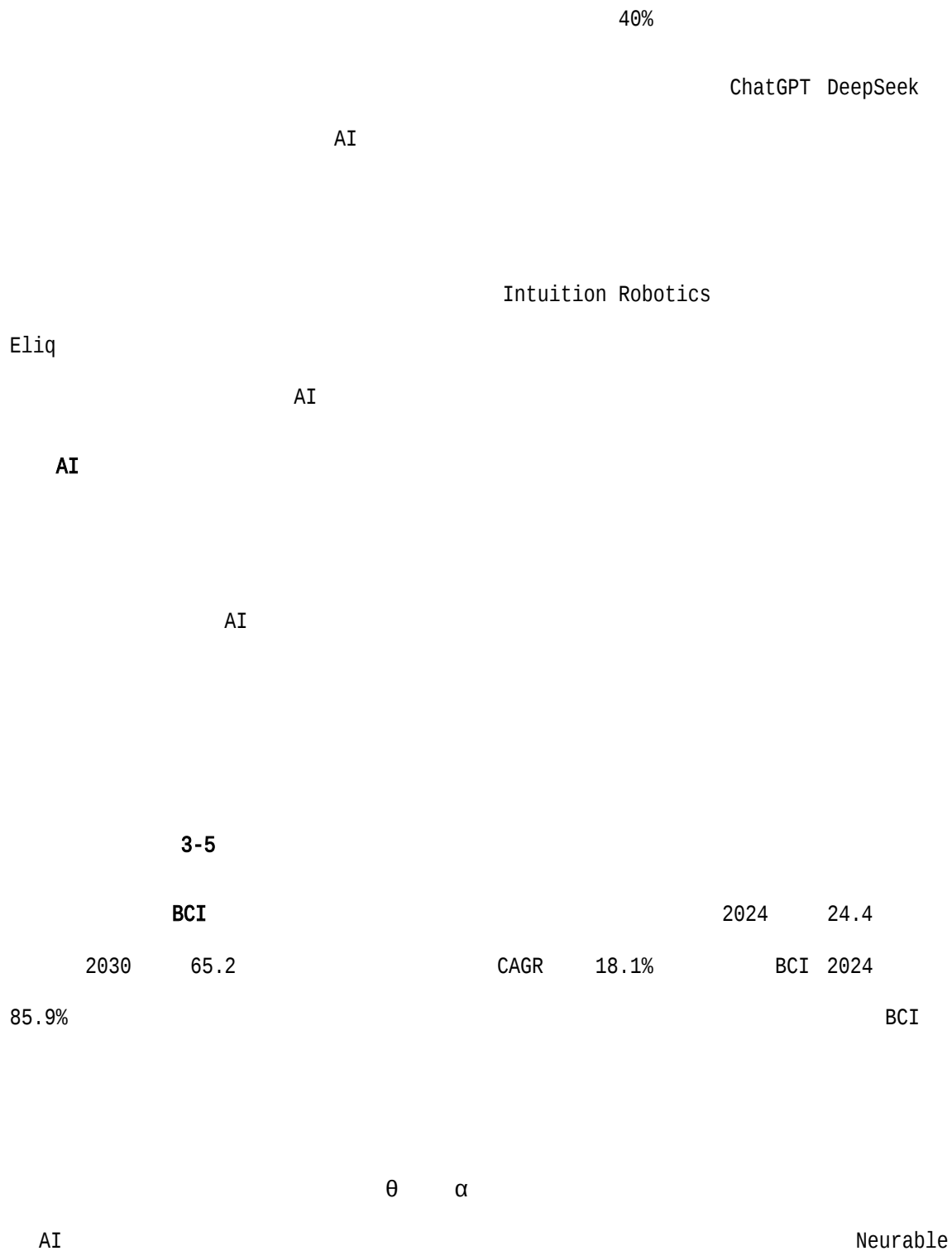
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AI

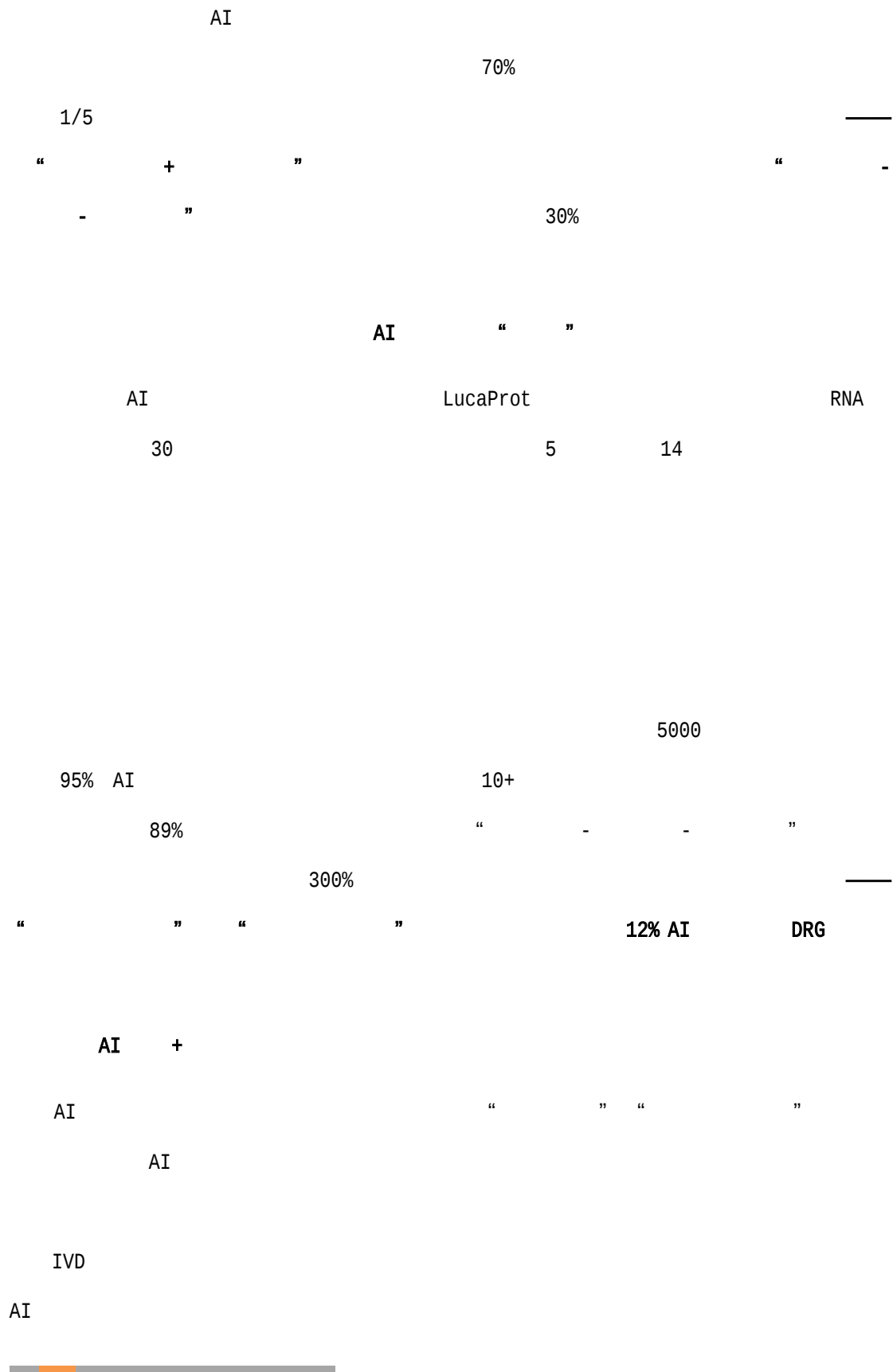






AI





20%

“ + ”

AI

POCT+AI

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5G+AR

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AI+

AI+

30%

AI

2027

80%

GDPR

AI

2026

45%

90%

50%

65%

AI

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- ”

-

AI

3

IP

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IP ”

NewCo

1

“

”

“

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IP ”

1980

2010

2009

GDP

30%

“

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21

WIPO

2021

159

11

2021

360

“ ” “

” “ IP ”

Ä

2000

2015

%



Biotech

IPO M&A

Biotech

3

IPO

Biotech

NewCo

J

NewCo

NewCo

NewCo

IPO

NewCo

Biotech

Biotech

IPO

IPO/M&A/BD

3

NewCo





2023

5,662

2023-2029

5%

NewCo

“ NewCo ”

NewCo

4

“ ”

“ ”

“ ” “ ”

1 2024

4,762

15%

2023

“ ” “ ” “ ”

2024

2023 1 4,176

4762

15%

2030

1.8

1.1

8

2030

85%

20%

2024 10

HMOs

“ ”

NewCo

6

2024

“

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2024

“ ”

“ ”

“ ” “ ”

5

