

# 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%







# CEC CAPITAL

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



AI

6

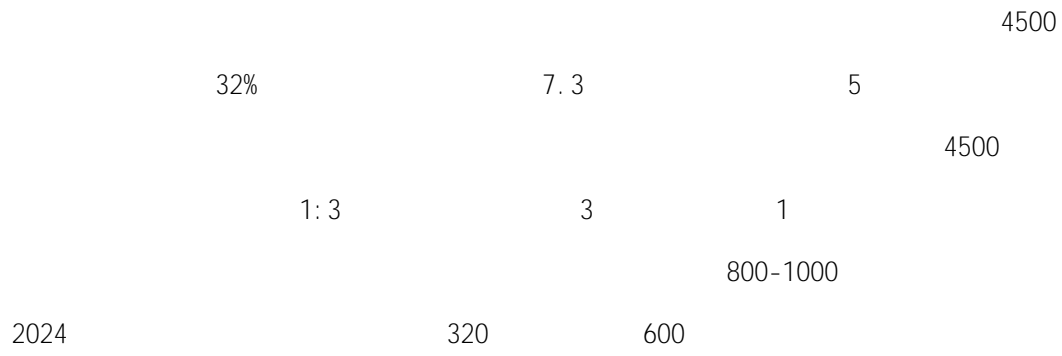
AI

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%				
			"	"	"
					"
"	"				
			3-5		
				VR/AR	
	3D		AI		



# CEC CAPITAL



" + "

2

2025

50%

2030

30





26

440

+

+

3

AI

AI

AI

Vital Connect

2025

1

Zoe

3

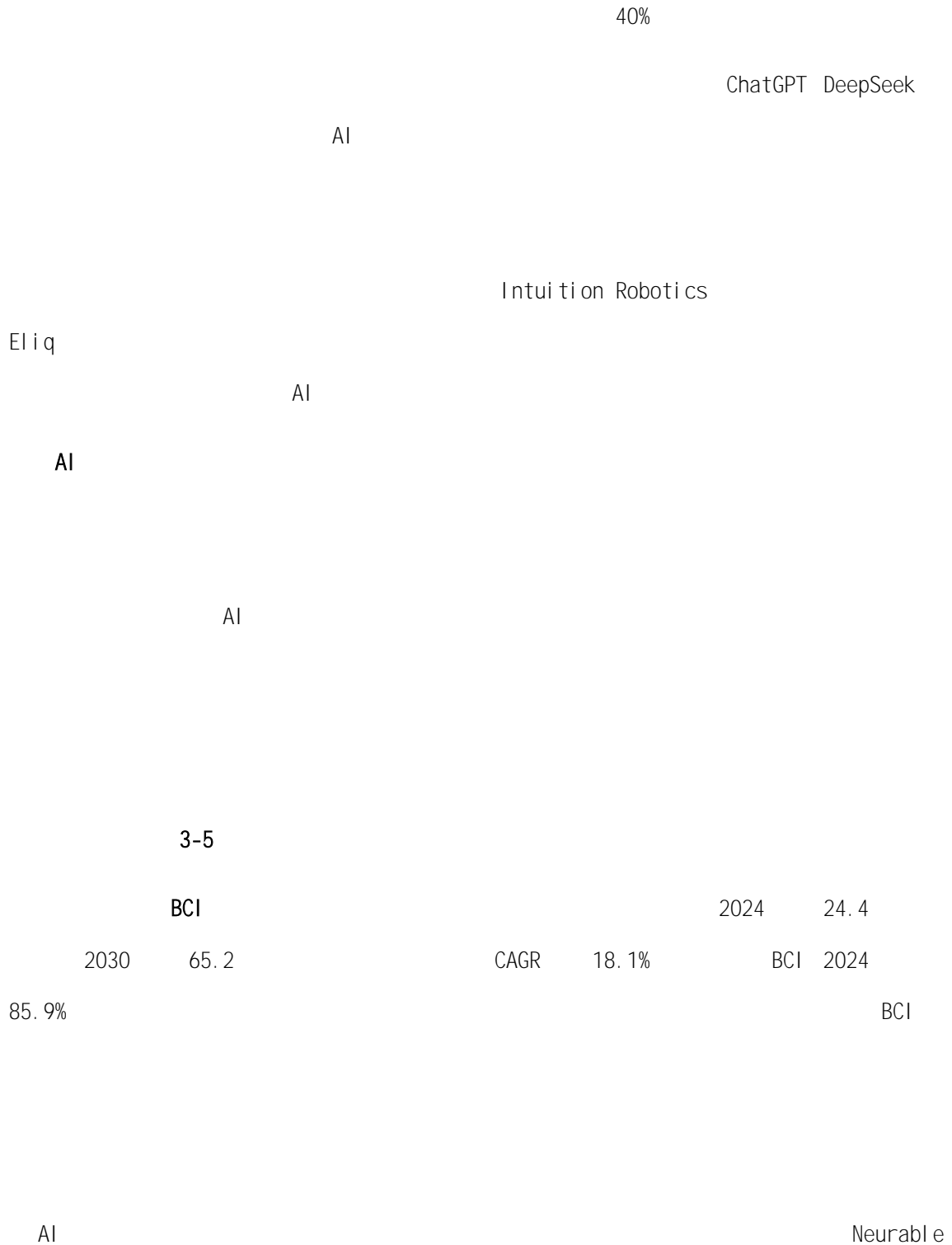
AI

AI

"

AI











# CEC CAPITAL

AI

70%

1/5

" + "

- "

30%

AI " "

AI LucaProt RNA

30 5 14

5000

95% AI 10+

89%

300%

" - - "

" " " " " " " " " "

12% AI DRG

AI +

AI " " " "

AI

IVD

AI



20%

"

+

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AI

POCT+AI

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5G+AR

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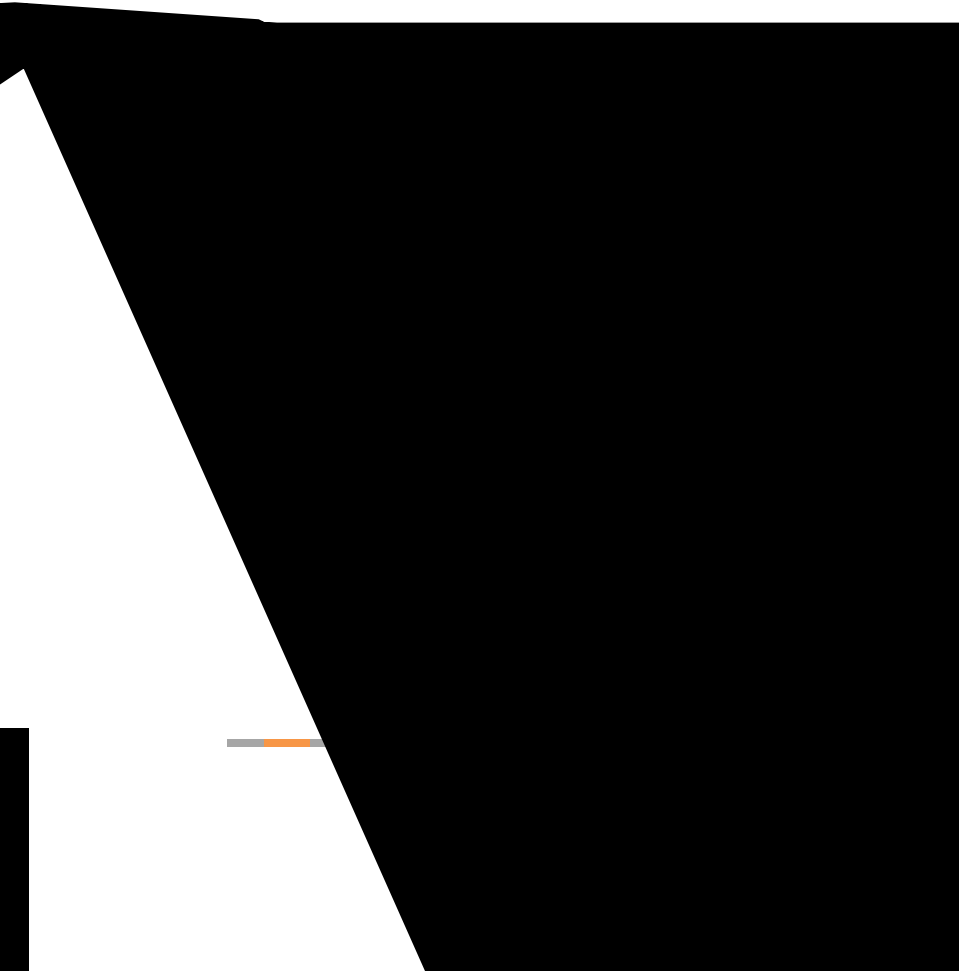
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"

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# CEC CAPITAL



AI +



" " "

" " | P" >

2000 2015

|







Stati sta 2023 5,662  
 10 2023-2029 5%

NewCo

" NewCo "

NewCo

4 " "

" " " " " "

1 2024 4,762 15% 2023

" " " " " "

2024 2023 % 4,176 4762

15% 2030 1.8

1.1 8





14

" "

4

" "

" " " "

2030

85%

20%

2024 10

HMOs



NewCo

6

2024

"

2024

"

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"

"

5





# CEC CAPITAL

