

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



CEC CAPITAL.

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.





CEC CAPITAL.



CEC CAPITAL.

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

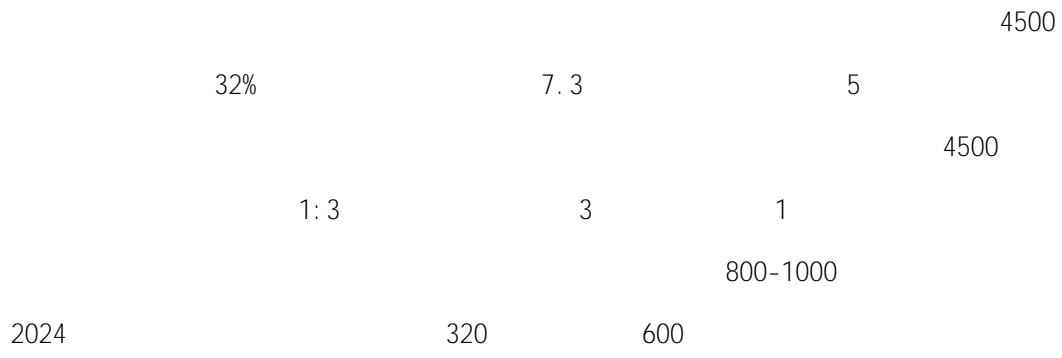
VR/AR

3D

AI



CEC CAPITAL.



CEC CAPITAL.

" + "

2

2025

50%

2030

30



CEC CAPITAL.

26

440

+

+

3

AI

AI

AI

Vital Connect

2025

1

Zoe

3

AI

AI

"

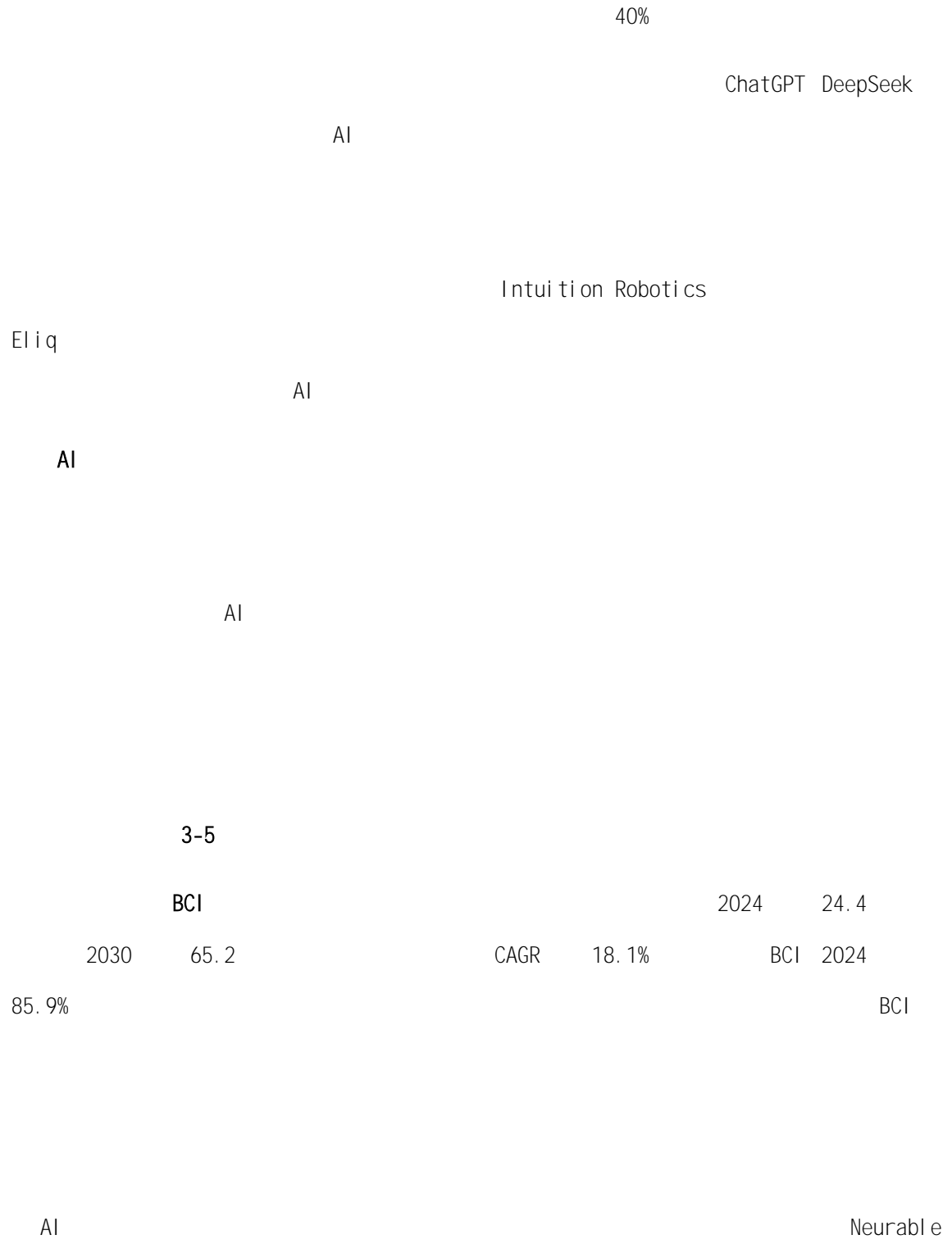
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"

AI





CEC CAPITAL.



CEC CAPITAL.

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

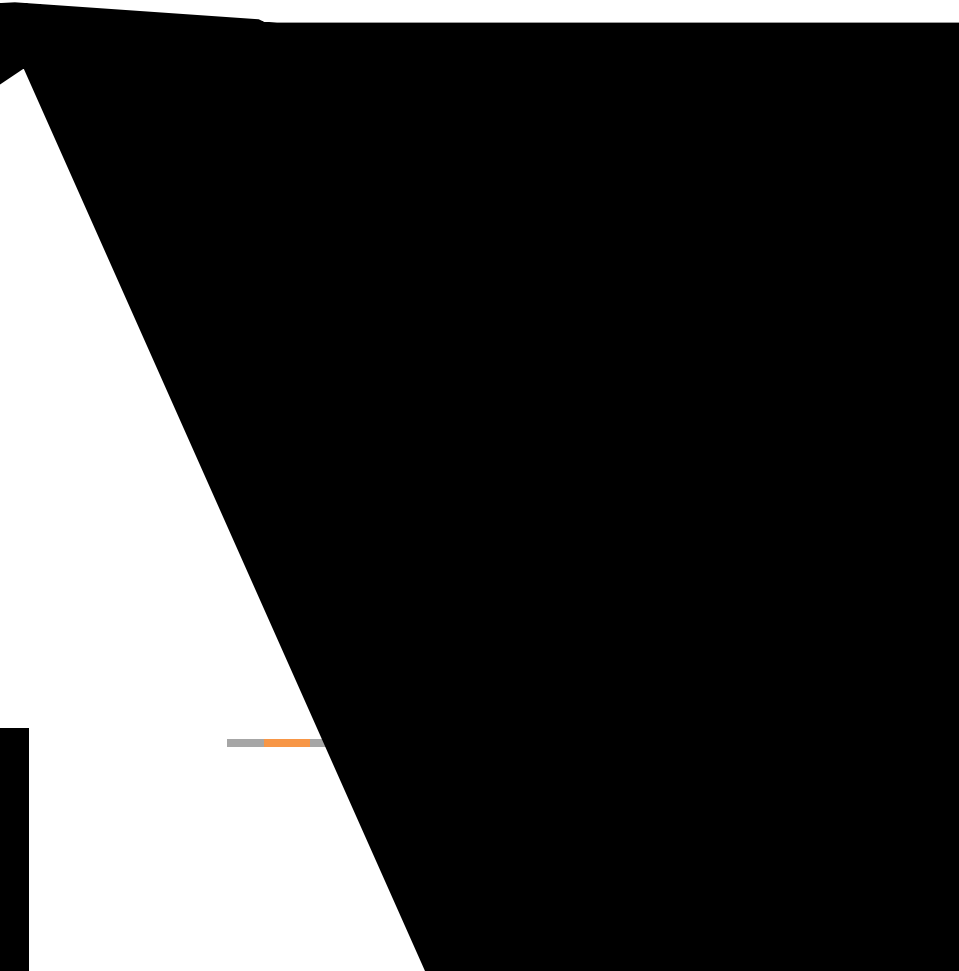
IVD

AI

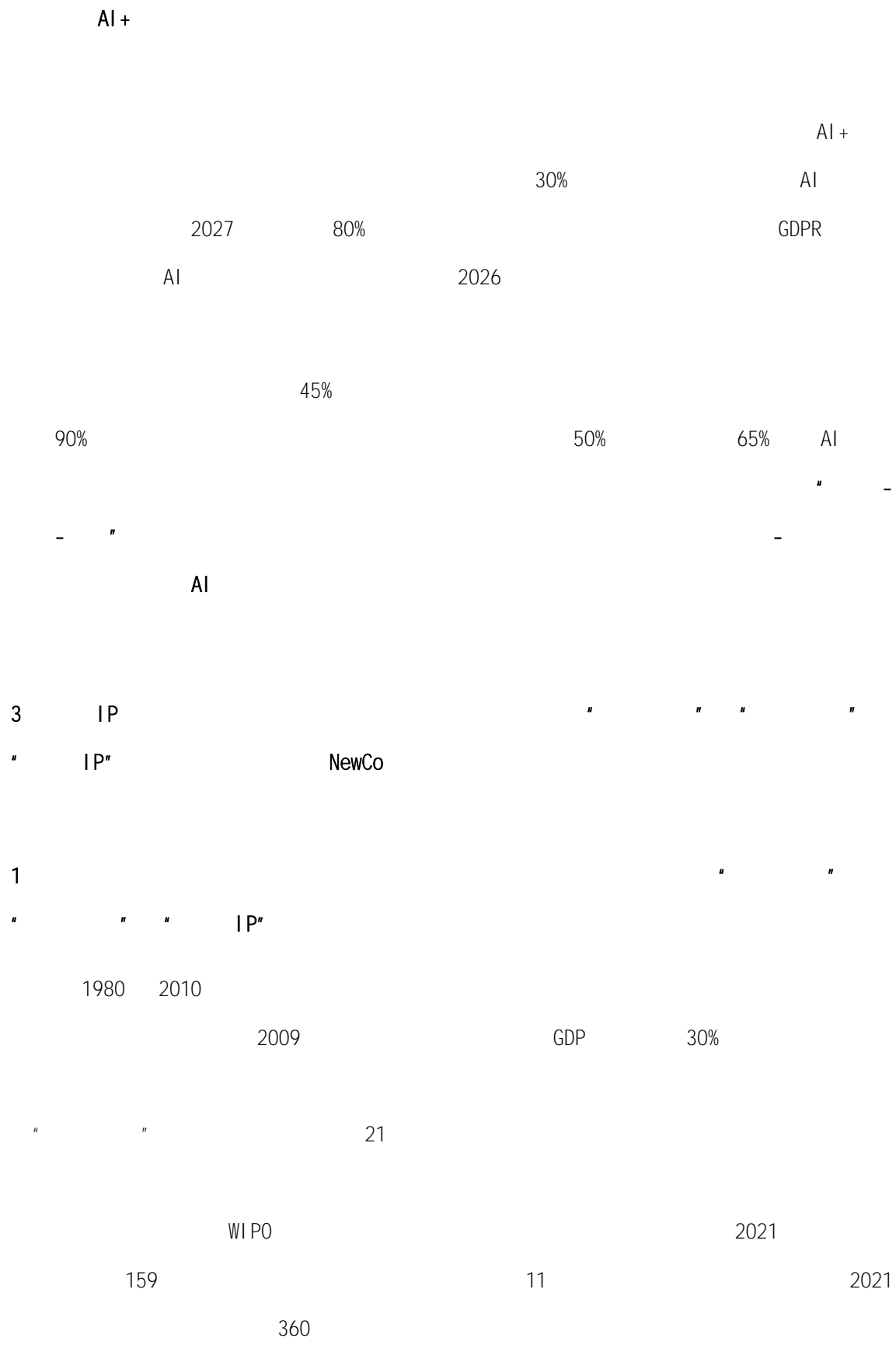


CEC CAPITAL.





CEC CAPITAL.



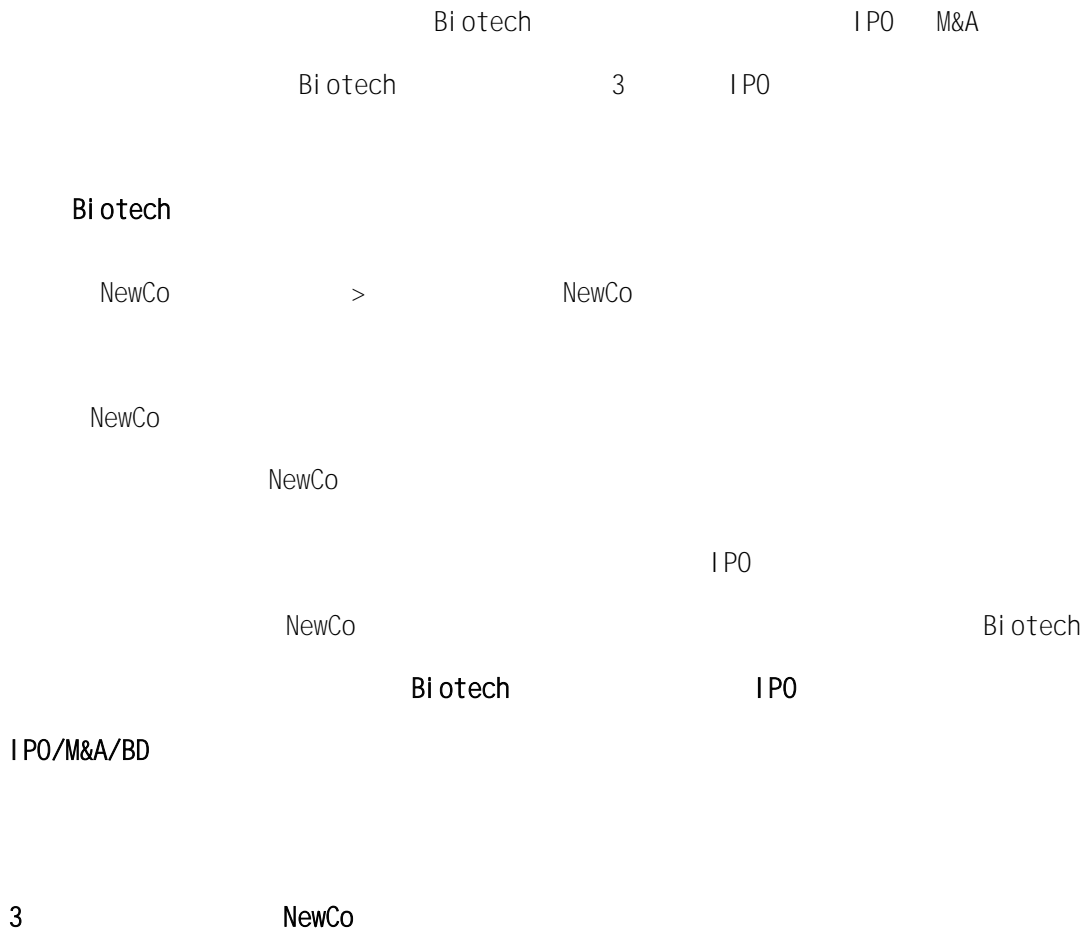
CEC CAPITAL.

" " IP" > " " "

2000 2015 |



CEC CAPITAL.



CEC CAPITAL.

10 Statista 2023 5,662
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



CEC CAPITAL.

14

"

"

4

"

"

"

"

"

"

2030

85%

20%

2024 10

HMOs



CEC CAPITAL.

" " NewCo

6 2024 "

"

2024

" "

" "

" " " "

5



CEC CAPITAL.

