

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%

IP

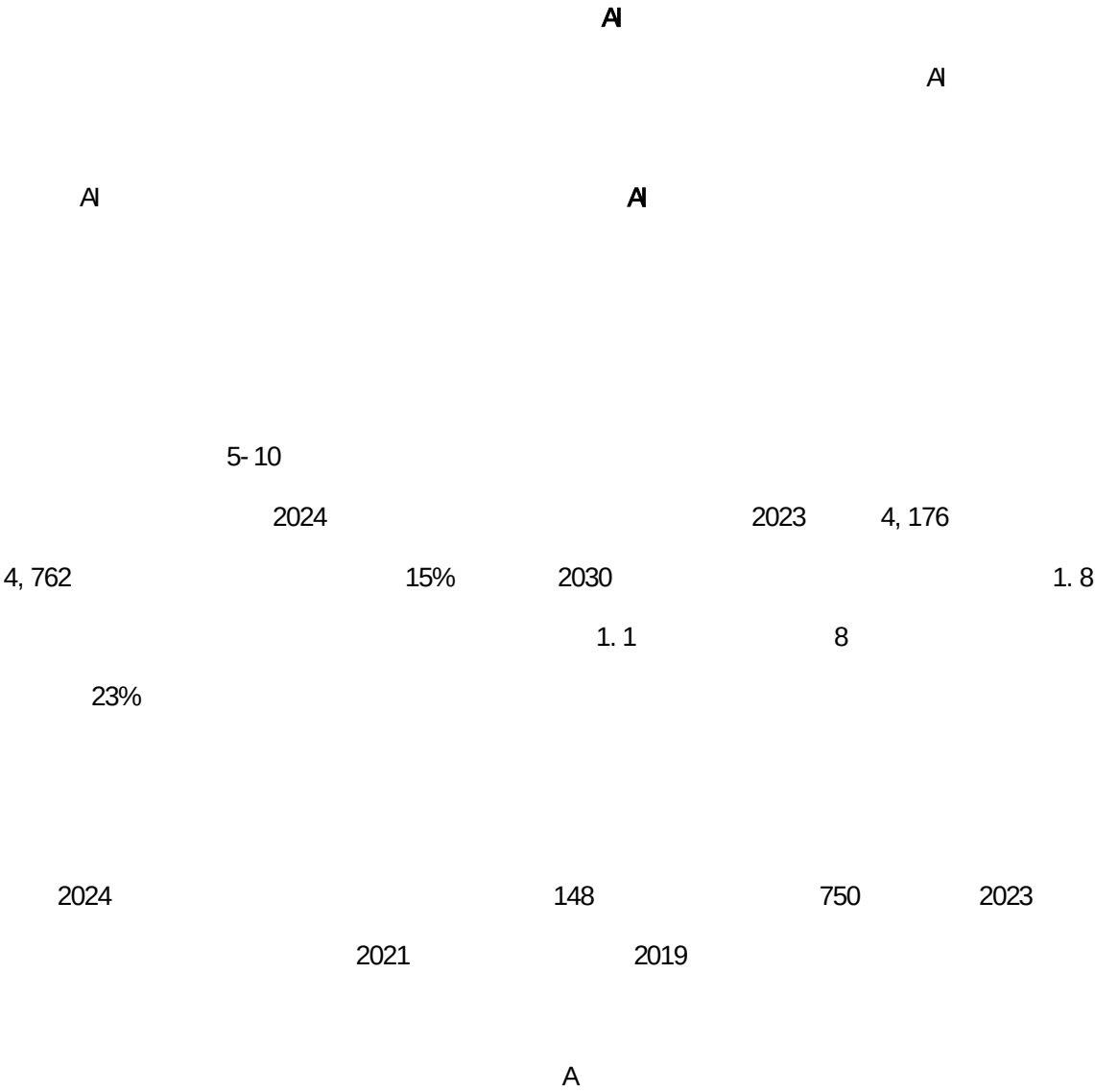
DeepSeek

IP

IP

IP

1994



1

20

1

2024 60 3. 1 22%

65 2. 2 15. 6% 10 2025- 2035

60 1000 2035 4 30%

2050 4. 87 1/ 4

34%

2000 10% 2025 20% 2035 30%

35 2035

20- 64 4700 2050 1. 24

2050 7396 11%

2024

954 2023 902 52 2016

6. 77

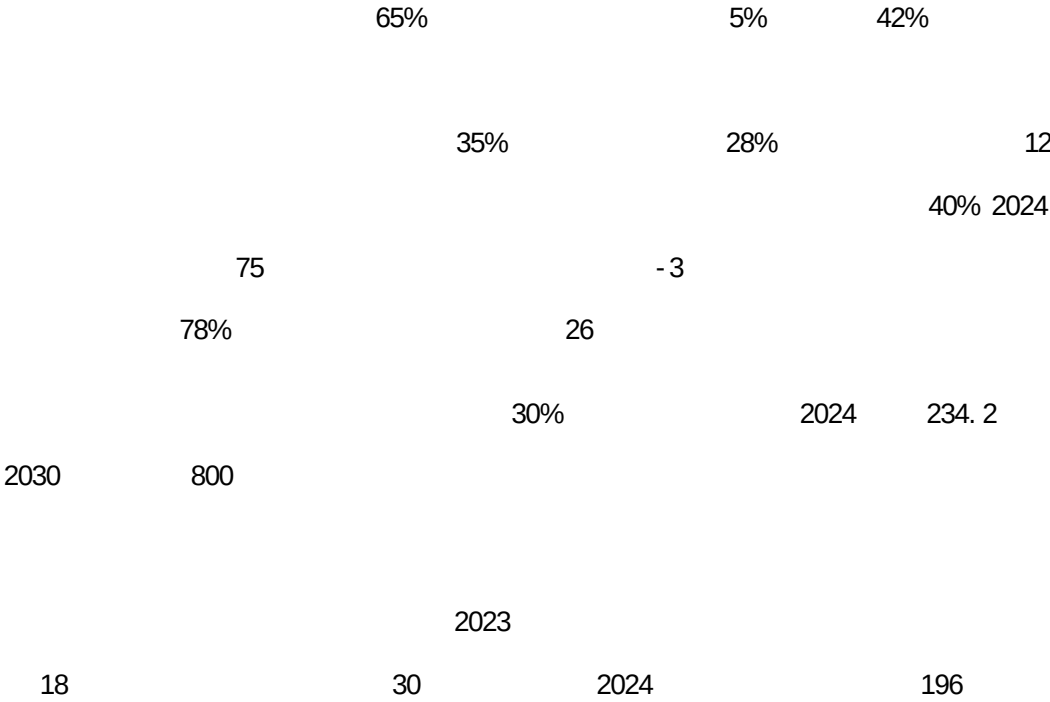
2



40

34. 3% 80%





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

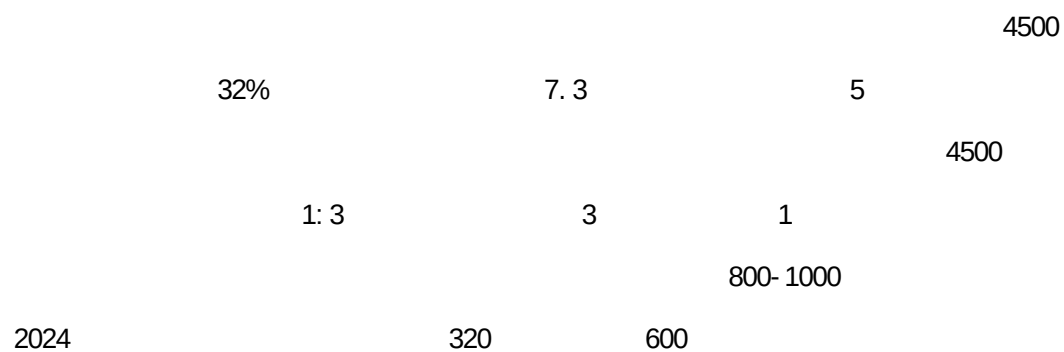
12%

3- 5

VR/ AR

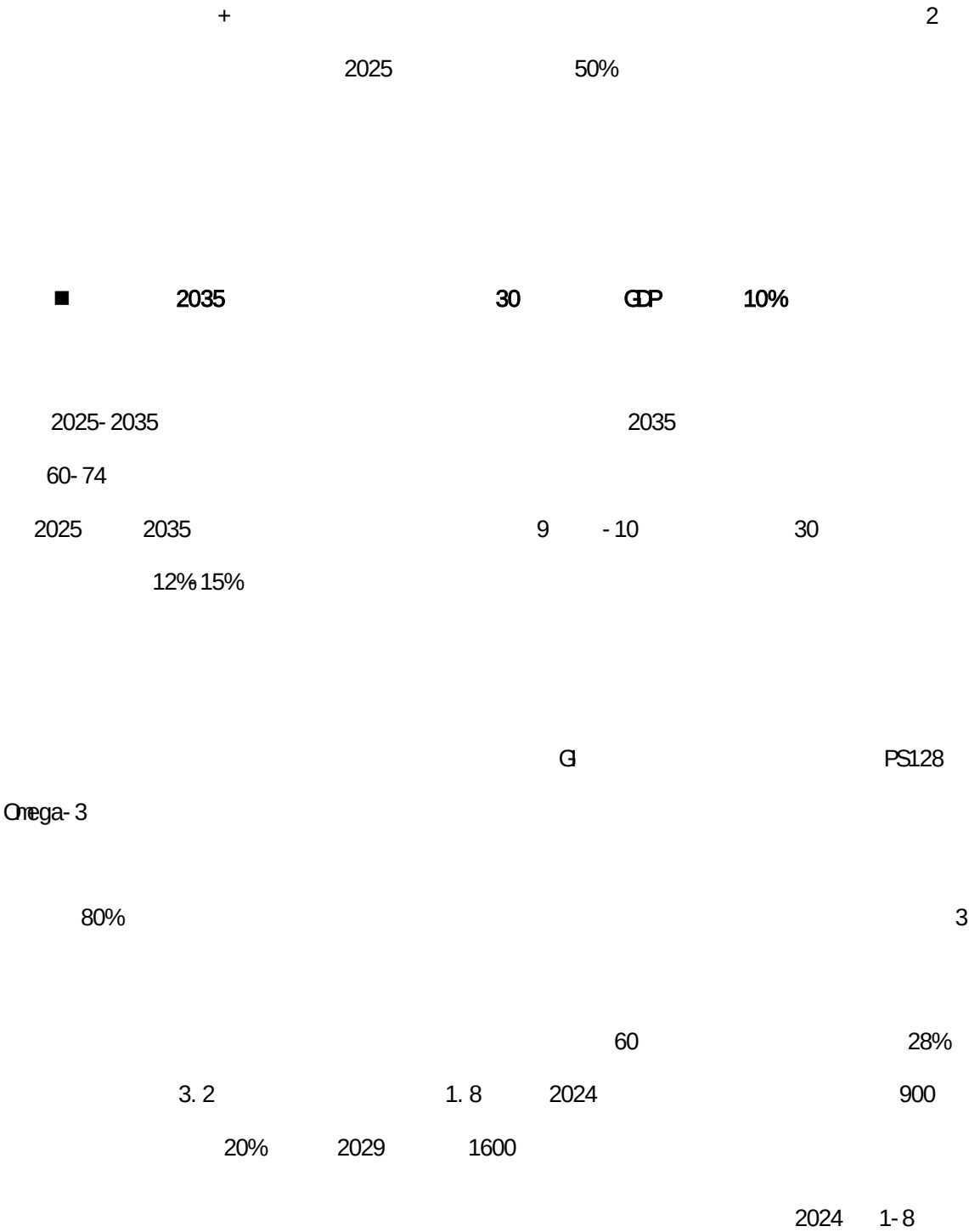
3D

AI



2030

70%



26

440

+

+

3

AI

■

AI

AI

Vital Connect

2025

1

Zoe

3

AI

AI

"

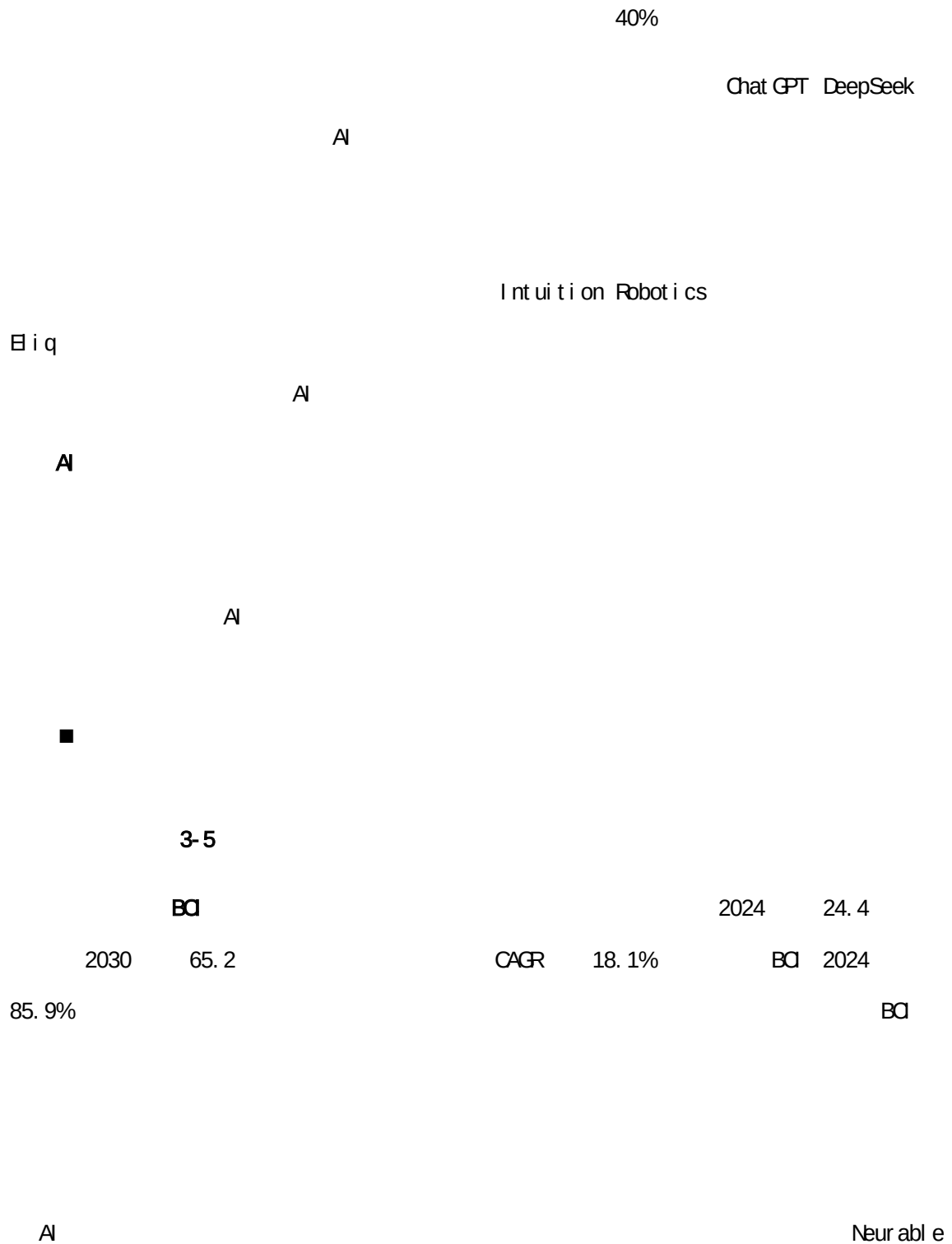
-

-

"

AI





MT

BCI

AD

ALS

BRAIN

2024

2024

Blueprint Medtech

2024

18

BCI

2024

Neuralink

3

2025

20-30

2030

2.2

Synchron

2024

10



20

50

AI

AI

14

AI

/

AI

1 AI

AI

- -

AI

- -

- -

■ - -

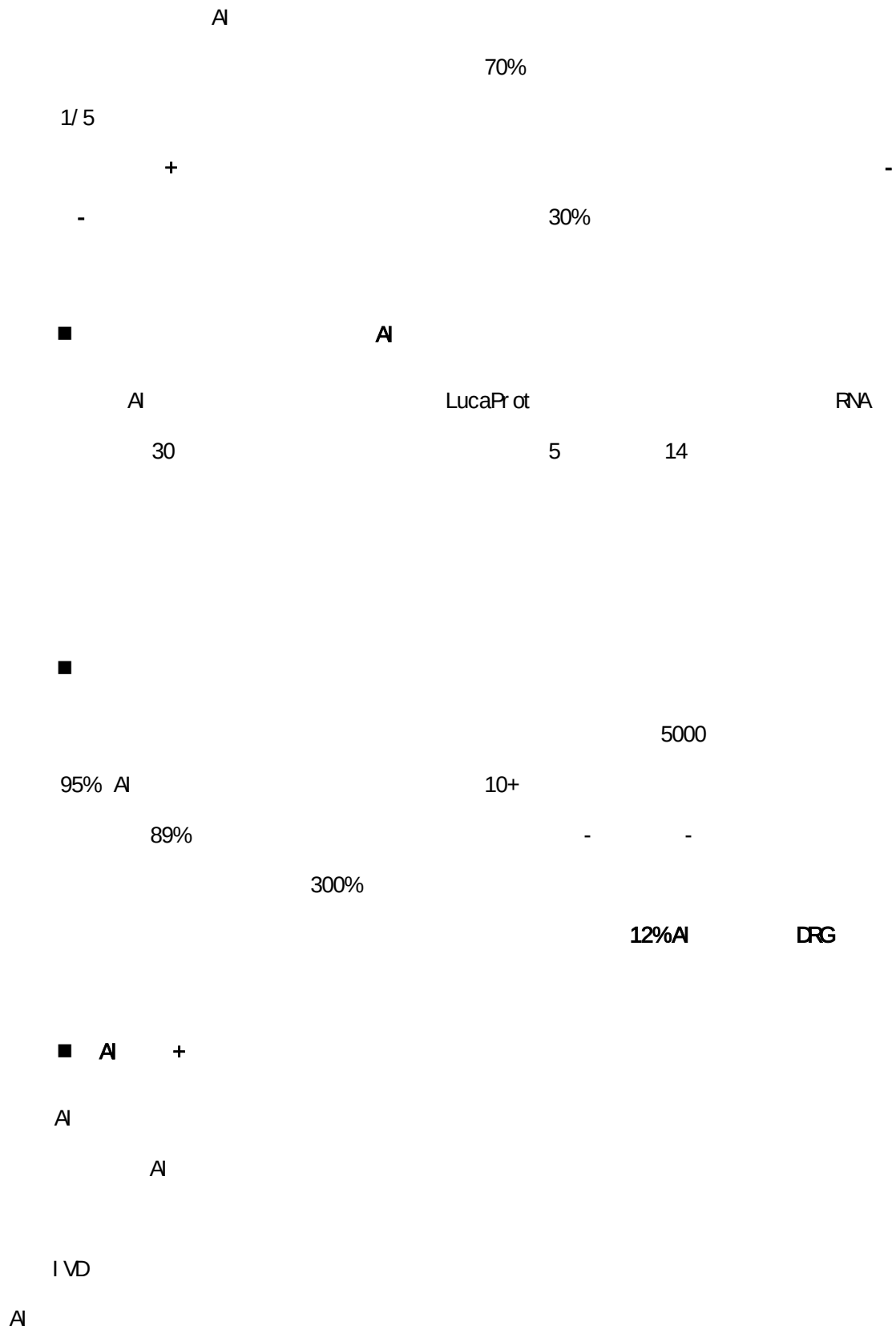
AI

+

AI

- - -

■



20%

+

AI

POCT+AI

■

- -

5G+AR

-

■

- -

+ +

- -

2 AI +

AI +

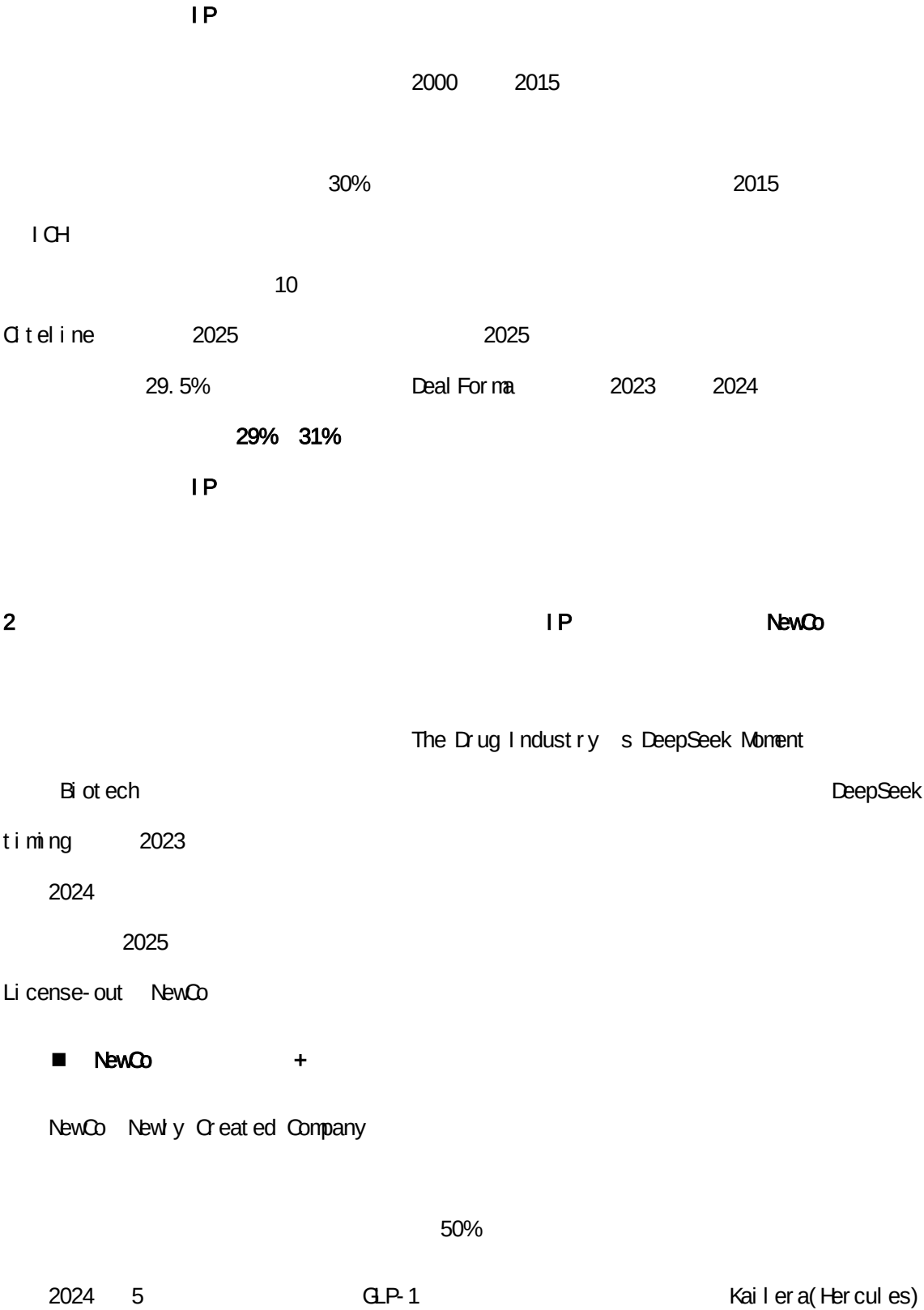
AI +

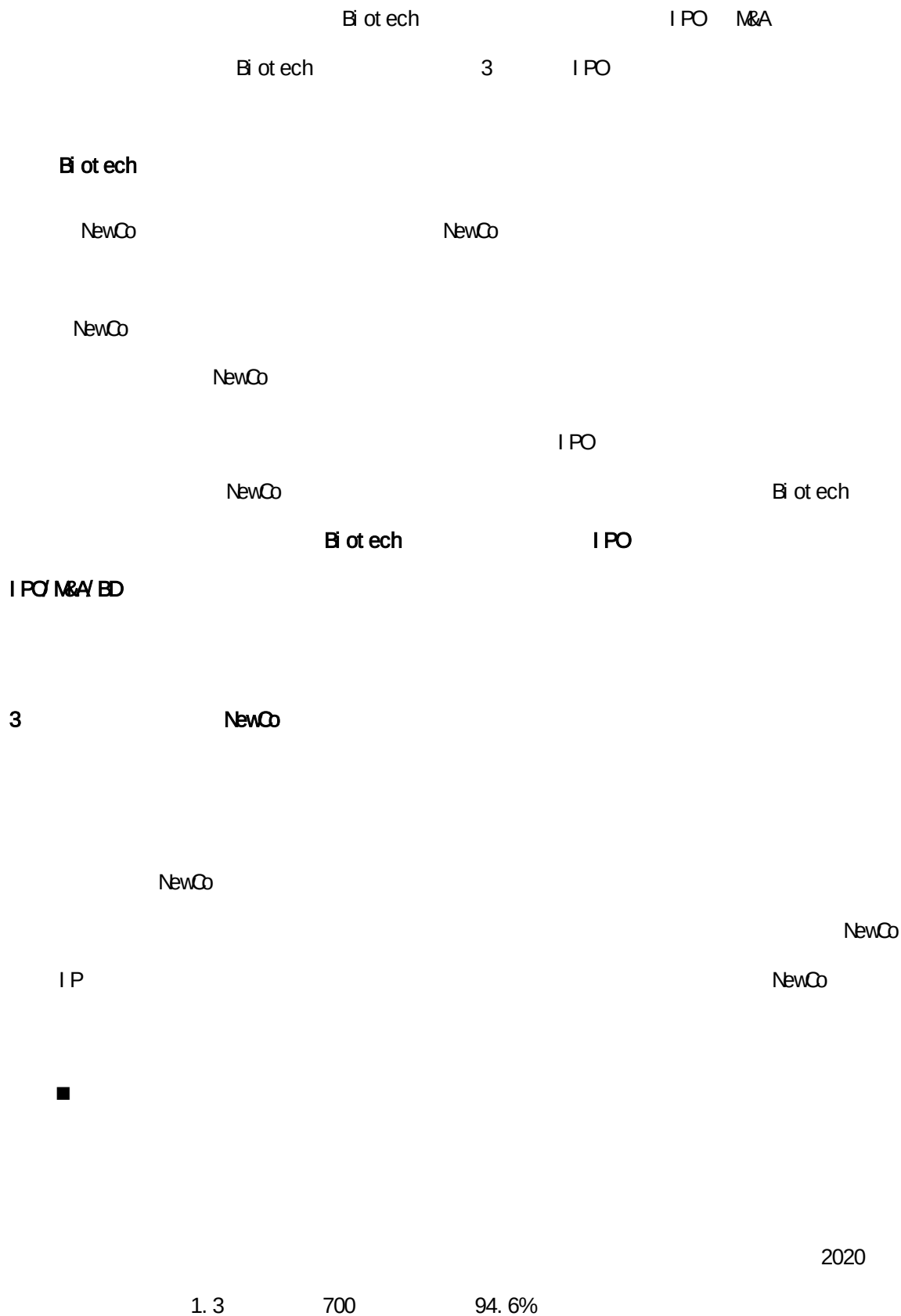
■ AI

DeepMind AlphaFold 2

■ A+



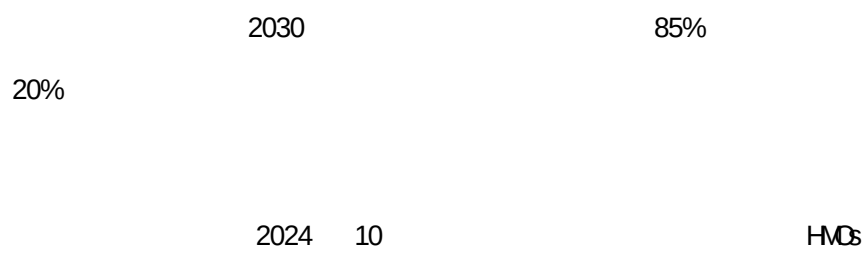




Stat i st a		2023	5, 662			
10	2023- 2029	5%				
■						
■ NewCo						
NewCo						
NewCo						
NewCo						
4						
1	2024	4, 762	15%	2023		
2024						
15%		2030	2023	4, 176		
				4762		
				1. 8		
		1. 1	8			

14

4



5

14 80

1

NewCo

6

2024

2024

5

IPO

A

1

2 IPO

IPO

3 A

A

A

A

4

