China’s aging population presents a big challenge for the country’s health care system, which currently lacks adequate resources.

- The 60+ population will grow from around 165 million in 2010 to 440 million by 2050, constituting to 45% of the country’s total population.

Demographic shifts have led to a weakening of the traditional family support network due to mass rural-urban migration and the 4-2-1 family structure (four grandparents, two parents, one child).

The Chinese government has made ageing a top priority for provinces facing fast-aging population, by establishing guidelines to accelerate the country’s elderly care sector.

Some local actors are in the process of acquiring medical licenses for home nursing in order to differentiate themselves and to be positioned for the rising demand.

Foreign players are starting to offer home nursing provided by certified nurses.

Home nursing services, home care services, products and hardware (Alarm watch/belt linked to call center services), E-healthcare services (ERP-systems and customer e-health care services).

### MAJOR OPPORTUNITIES FOR SWEDISH COMPANIES IN THE ELDERLY CARE SERVICE MARKET

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**YOU COULD LEVERAGE ON THE GROWING OPPORTUNITIES WITHIN THE CHINESE ELDERLY CARE MARKET**

SOURCE: BUSINESS SWEDEN ANALYSIS
THE 60+ POPULATION IN CHINA WILL GROW FROM AROUND 165 MILLION IN 2010 TO 440 MILLION BY 2050

- The 60+ population will grow by 166% between 2010 and 2050
- China’s population will grow from approximately 165 million in 2010 to 440 million by 2050, constituting to around 35% of the country’s population
- China will have the largest amount of aged population in 2050 among the emerging countries
- Not only will China have the largest percentage of older people in 2050, but it will also have the largest population size on earth
- In 2050, the 60+ population of China will be larger than Brazil’s, Japan’s, India’s and Russia’s combined
- Long term elderly care will become increasingly important as the population ages

CHINA WILL HAVE THE MOST AGED POPULATION AMONG THE EMERGING COUNTRIES WHILE ITS POPULATION SIZE CONTINUES TO GROW

SOURCE: UNITED NATIONS POPULATION DATABASE, BCG
60 MILLION CHINESE WILL BE DEPENDENT ON NURSING CARE BY 15 MILLION CAREGIVERS BY 2030

CHINA’S POPULATION 2030
Percentage

60+ Independent 24%
60+ Dependent 4%
<60 72%

60+ DEPENDENT IADL / ADL
Million Inhabitants

Disabled Elderly 24
Home Care Needs 2
Nursing Home Needs 48

CAREGIVER DEMAND
Million Caregivers

Demand 2030 15
Current Offer 0,3

MASSIVE INCREASE IN CAREGIVING SERVICES IS NEEDED TO COVER CHINA’S FUTURE DEMAND

SOURCE: CHINA BUREAU OF STATISTICS, STUDY ON DISABILITY STATUS OF ELDERLY IN URBAN AND RURAL CHINA 2010, AUTHORS ANALYSIS

ADL (ACTIVITIES OF DAILY LIVING) INCL. DRESSING, BATHING, TOILETING, FEEDING, MOBILITY, TRANSFER BETWEEN BED AND AMBULATING (WALKING OR WITH WHEELCHAIR) / IADL (INSTRUMENTAL ACTIVITIES OF DAILY LIVING) INCL. PREPARING MEALS, SHOPPING, HOUSEWORK, MANAGING FINANCE, PHONE USE
GUIDELINES ARE SET TO ACCELERATE THE ELDERLY CARE SECTOR BY 2020

OVERVIEW OF KEY GOVERNMENT INITIATIVES ON ELDERLY CARE

- **Shanghai 1st city first to initiate home care in China in 2001**
- **Basic regulations of homecare welfare by ministry of health requirements**
- **China’s 12th 5 year plan, aims to improve LTC in the country with home based care as a foundation (90%), backed by community-based services (7%) and supported by institutional care (3%)**
- **Private forces become encouraged to join the operation of homecare services**
- **The Jiangsu province enters a pilot phase to improve the healthcare system; by upgrading all healthcare centers in the province**
- 46 guidelines are established with clear roles and responsibilities to accelerate the development of China’s elderly care sector and build nationwide elderly care service system by 2020
- **Guideline on development of the healthcare service industry which will put forward several development goals for the country’s healthcare industry to achieve by 2020**

SOURCE: BUSINESS SWEDEN ANALYSIS
### EXAMPLES OF HEALTH CARE SERVICE SECTORS WITH HIGH POTENTIAL IN CHINA

#### Home Nursing Services
- Diabetes treatment
- Wound care
- Preventive care
- Rehabilitation
- Assessment
- Injection administration
- Incontinence products

#### Home Care Services
- Basic maintenance of personal hygiene for elderly (i.e. assistance in showering)
- Other menial tasks (e.g. collection of medication from the hospitals, helping elderly on walks in neighborhood/up and down stairs)

#### Product & Hardware
- Alarm watch/belt linked to call center services
- Electronic doors, smart mattresses
- Rehabilitation gears
- Cooperate with international and local third party providers

#### ERP/Health
- ERP System (Electronic scheduling, performance review, Data patient management and etc.)
- Customer E-health applications – self management

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**MAJOR OPPORTUNITIES FOR SWEDISH COMPANIES OFFERING SERVICES AND PRODUCTS WITHIN THESE SECTORS**

SOURCE: BUSINESS SWEDEN ANALYSIS
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