

China's Rehabilitation Industry Overview: Tremendous Untapped Potential on Demographic, Epidemiological and Nutrition Transitions

Introduction/Executive Summary

- **Rehabilitation** is the use of all means to **restore normal function or reduce the impact of disabling** for individuals following a disease or an injury and **enable people with disabilities to achieve optimal social integration**. Meanwhile, rehabilitation therapy is mainly used to help patients recover through non-invasive treatments such as physical therapy and exercise.
- **Demand for rehabilitation medical care mainly comes from three groups of people, namely the elderly, the disabled and the chronically ill**. The need for rehabilitation continues to grow worldwide, especially in low- and middle-income countries alongside China, due to rapidly-growing aging population accompanied by rising chronic disease incidence that causes an increasing number of disabled people as well as multi-morbidity¹ as more people are participating in sports.
- **Global rehabilitation industry is dominated by the U.S. amid shortage in supply of rehabilitation services elsewhere**. U.S. and Germany are the leaders of the global rehabilitation market, accounting for 51.4% and 15.3% of share respectively. On the contrary, China's rehabilitation medical industry is much smaller in scale, but it is catching up. At the same time, demand for rehabilitation services, which represent **significant health, social, and economic benefits**, has already exceeded availability in many parts of the world, resulting in massive unmet needs. It is because the capacity for rehabilitation service provision is limited or even non-existent in those parts of the globe. The shortfall in supply indicates a necessity for boosting investment in building out the rehabilitation infrastructure, facilities and workforce.
- **There are three main types of rehabilitation therapy: physical, occupational and speech**. Each form of rehabilitation serves a unique purpose in helping a person reach full recovery if possible. Yet all share the same ultimate goal of assisting a patient to return to a healthy and active lifestyle. In addition, rehabilitation treatments can be divided into the following six categories according to the disease or injury the patient has encountered:
 - Neurological diseases;
 - Osteoarticular² muscle diseases and disability;
 - Cardiovascular and respiratory diseases;
 - Diseases typically associated with the elderly;
 - Children's diseases; and
 - Mental disability.
- **Modern biotechnology advancements such as cell therapies and regenerative medicine are benefitting patients**. For instance, cell therapies could let patients avoid undergoing surgeries or other more invasive treatments. On the other hand, regenerative medicine therapies used in conjunction with physiotherapy, (a traditional rehabilitation medical treatment and is also known as

¹ Co-occurrence of two or more chronic conditions and has been estimated to affect up to 95% of the primary care population aged 65 years and older

² Relating to, involving, or affecting bones and joints

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