

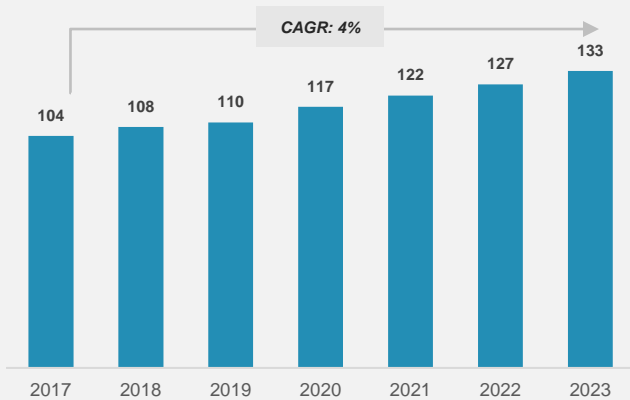
# SOUTH KOREAN HEALTHCARE SYSTEM LANDSCAPE

## OVERVIEW OF HEALTHCARE SYSTEM IN SOUTH KOREA

South Korea's healthcare system, with universal coverage for ~51 million citizens, combines public & private providers through the National Healthcare Information Infrastructure (NHII). This digital platform supports data sharing & preventive care, with ~70% of Koreans undergoing regular health checkups. Challenges include an aging population, long-term care needs, & rising costs, but the commitment to technology, prevention, & universal access positions it as a model for the future.

### HEALTHCARE EXPENDITURE

Per Capita Healthcare Spending | Figures in thousands



- In 2022, the per capita healthcare expenditure of South Korea was ~127 thousand, contributing to ~9.7% of GDP.
- Factors such as an ageing population, universal health insurance, and growing awareness and demand for better healthcare are fueling healthcare spending.
- The government finances majority of healthcare expenditure (~65%) through the National Health Insurance Service.
- South Korea has a relatively high number of hospital beds. In 2021, it had ~12.77 beds/1000 population, second only to Japan.

### PREVAILING DISEASES IN SOUTH KOREA

Chronic diseases, e.g., cancer and heart disease, constitute ~70% of all deaths in South Korea, with their prevalence likely to rise with aging.

Prevalent Diseases	% of Deaths Caused in 2022
Cancer	31%
Heart Disease	17%
Cerebrovascular Diseases	11%
Pneumonia	4%
Intentional Self-Harm	3%
Others	34%

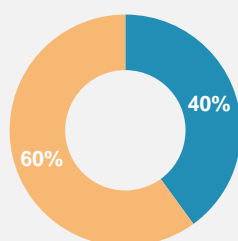
To tackle diseases, the South Korean government has introduced several initiatives:

- **The National Cancer Control Plan** involves personalized cancer therapy based on individual genomic profiles and AI applications for cancer diagnosis and treatment.
- **Universal Health Insurance** ensures affordable and accessible healthcare for all citizens, with a single-payer system, mandatory participation, and prepaid financing.
- **The Healthy Heart 2030 project** aims to reduce heart disease-related premature deaths by 20% by 2030, emphasizing healthy lifestyles, and optimized cardiovascular condition management

### PUBLIC VS PRIVATE HOSPITALS

South Korea predominantly favors private hospitals, which cater to ~72% of outpatients. On the other hand public hospitals focus on ~28% of outpatients, primarily serving low-income individuals and senior citizens.

Hospital Split



Public Private

South Korea has ~1,100 hospital beds, mostly private

Top Private Hospitals in South Korea	Top Public Hospitals in South Korea
Samsung Medical Center	National Medical Center
Asan Medical Center	Seoul Metropolitan Government Medical Center
Seoul National University Hospital	Gangnam Sacred Heart Hospital
Severance Hospital	Jeongbuk Medical Center

## FUTURE INITIATIVES

Future Outlook	Description
Enhancing Accessibility and Affordability	<ul style="list-style-type: none"><li>▪ <b>Universal Health Insurance Reform:</b> Introducing tiered premiums based on income may involve lowering costs for individuals actively managing chronic conditions such as diabetics with regular checkups and healthy blood sugar levels.</li><li>▪ <b>Public-Private Partnerships:</b> A PPP-built rural hospital specializing in geriatric care could offer advanced rehabilitation facilities and skilled staff for the aging population.</li></ul>
Fostering Innovation and Technology	<ul style="list-style-type: none"><li>▪ <b>National Healthcare Information Infrastructure Expansion:</b> Using wearable data could predict heart disease risks based on heart rate and activity, enabling timely interventions.</li><li>▪ <b>Medical Robotics and Automation:</b> Minimally invasive cancer procedures with surgical robots can reduce scarring and recovery times, improving patient experiences and potentially lowering hospital stays.</li></ul>
Promoting Wellness and Personalized Care	<ul style="list-style-type: none"><li>▪ <b>Public Health Campaigns:</b> A nationwide campaign against childhood obesity could include school partnerships for healthy lunches, community exercise events, and parental education on nutritious choices.</li><li>▪ <b>Long-Term Care Management:</b> Home monitoring for the elderly, using technology like sensors for activity tracking and fall detection, could alert caregivers in case of emergencies.</li></ul>

*The South Korean government's ambitious plans and commitment to innovation hold great promise for the future of its healthcare market.*

Right from understanding key issues to advising you through the right set of insights and recommendations, Aranca's research, consolidation, and insightful analysis will aid in-depth understanding of therapy and effective decision-making.

### HOW CAN ARANCA HELP?

- 01 Epidemiological Analysis:** Prevalence and diagnosis of diseases based on geography, gender, race and ethnicity, etc.
- 02 Diagnosis and Treatment Paradigm:** Analysis of diagnosis and treatment algorithm adopted in clinical practice
- 03 Current and Future Landscape:** Current treatments and latest pipeline landscape assessment for a particular therapy area
- 04 Humanistic, Economic Burden, and Unmet Need Analysis:** Impact of a disease on the patient's mental and economic well-being
- 05 Health Technology Assessment:** Analysis of HTA decisions published by various countries

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