

2014–2025 年臺灣醫衛產品出口發展現況

本文節錄自生策中心《2025 年台灣醫衛產品出口概況》報告

臺灣醫衛產品出口已由單一市場依賴轉型為多元且具韌性的全球布局

2014 至 2025 年間，臺灣醫衛產品出口從以中港澳為主的集中型結構，逐步轉型為多元分散的全球布局體系。整體出口規模在波動中持續擴張，至 2025 年達 89.4 億美元，顯示產業具備長期成長動能。

在政策推動下，新南向市場由原本的輔助角色，逐步成為穩定支撐出口的重要板塊，其長期成長率優於全球平均，並在全球占比中維持雙位數水準。整體而言，臺灣醫衛產業已建立兼具成長性與抗風險能力的出口結構。

表 1、臺灣醫衛產品歷年各市場出口金額及年增率

單位：百萬美元 (YoY)

區域	期間	醫衛新南向政策推動前				醫衛新南向政策第一期				醫衛新南向第二期			
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	
全球	7,000.9	6,957.7 (-0.6%)	7,185.7 (3.3%)	7,413.0 (3.2%)	8,144.1 (9.9%)	8,300.0 (1.9%)	8,826.4 (6.3%)	10,902.9 (23.5%)	9,425.8 (-13.5%)	8,621.8 (-8.5%)	7,984.2 (-7.4%)	8,940.7 (12.0%)	
中港澳	1,590.1	1,555.4 (-2.2%)	1,662.7 (6.9%)	1,775.6 (6.8%)	2,052.9 (15.6%)	1,951.2 (-5.0%)	1,870.9 (-4.1%)	2,137.8 (14.3%)	1,975.7 (-7.6%)	1,641.0 (-16.9%)	1,685.9 (2.7%)	1,567.0 (-7.1%)	
新南向 8 國	835.3	774.0 (-7.3%)	757.6 (-2.1%)	871.3 (15.0%)	971.8 (11.5%)	981.2 (1.0%)	977.9 (-0.3%)	1,136.4 (16.2%)	1,163.9 (2.4%)	1,006.4 (-13.5%)	1,022.5 (1.6%)	1,059.4 (3.6%)	
越南	236.8	218.7 (-7.7%)	214.5 (-1.9%)	244.4 (14.0%)	261.8 (7.1%)	274.4 (4.8%)	298.2 (8.7%)	312.3 (4.7%)	307.9 (-1.4%)	276.0 (-10.3%)	289.4 (4.8%)	293.9 (1.6%)	
泰國	123.4	121.9 (-1.2%)	128.2 (5.1%)	132.4 (3.3%)	145.3 (9.8%)	140.1 (-3.5%)	137.0 (-2.3%)	197.8 (44.4%)	227.4 (15.0%)	204.7 (-10.0%)	197.2 (-3.6%)	207.6 (5.3%)	
馬來西亞	149.2	142.4 (-4.5%)	135.1 (-5.2%)	156.6 (15.9%)	171.7 (9.7%)	171.5 (-0.1%)	155.2 (-9.5%)	193.6 (24.7%)	197.9 (2.3%)	168.9 (-14.7%)	179.1 (6.1%)	185.4 (3.5%)	
菲律賓	84.2	71.8 (-14.7%)	74.3 (3.5%)	113.5 (52.8%)	119.8 (5.5%)	130.6 (9.0%)	135.1 (3.5%)	135.4 (0.2%)	116.1 (-14.2%)	77.8 (-33.0%)	75.1 (-3.5%)	90.2 (20.1%)	
印度	121.7	121.1 (-0.5%)	109.5 (-9.6%)	124.9 (14.0%)	153.7 (23.1%)	147.0 (-4.4%)	136.0 (-7.5%)	144.6 (6.3%)	168.1 (16.3%)	155.6 (-7.5%)	156.3 (0.5%)	159.6 (2.1%)	
印尼	73.6	75.6 (2.7%)	75.7 (0.1%)	76.8 (1.5%)	93.5 (21.7%)	96.3 (3.1%)	91.6 (-4.9%)	134.8 (47.1%)	126.4 (-6.2%)	108.7 (-14.0%)	113.4 (4.4%)	107.1 (-5.6%)	
緬甸	43.4	20.2 (-53.5%)	19.5 (-3.3%)	22.3 (14.4%)	25.5 (14.2%)	20.8 (-18.3%)	23.8 (14.1%)	16.6 (-30.3%)	18.9 (14.2%)	14.2 (-25.2%)	11.5 (-18.7%)	15.0 (30.4%)	
汶萊	3.2	2.4 (-25.2%)	0.9 (-63.9%)	0.5 (-42.7%)	0.5 (1.6%)	0.6 (11.5%)	1.0 (77.4%)	1.4 (43.2%)	1.1 (-22.1%)	0.6 (-45.9%)	0.4 (-31.5%)	0.5 (20.1%)	

資料來源：海關進出口統計 HS8 (<https://portal.sw.nat.gov.tw/APGA/GA30>)、生策中心彙整

表 2、臺灣醫衛產品 2014-2025 新南向政策推動各期間 CAGR 比較

	政策推動前	第一期	第二期	兩期間
	2014-2017	2017-2021	2021-2025	2017-2025
全球	1.93%	10.13%	-4.84%	2.37%
中港澳	3.75%	4.75%	-7.47%	-1.55%
新南向 8 國	1.42%	6.87%	-1.74%	2.47%
越南	1.07%	6.31%	-1.50%	2.33%
泰國	2.38%	10.57%	1.22%	5.79%
馬來西亞	1.62%	5.45%	-1.07%	2.14%
菲律賓	10.48%	4.51%	-9.65%	-2.83%
印度	0.87%	3.74%	2.50%	3.12%
印尼	1.43%	15.10%	-5.58%	4.25%
緬甸	-19.88%	-7.20%	-2.43%	-4.84%
汶萊	-46.31%	30.26%	-23.23%	0.00%

資料來源：海關進出口統計 HS8 (<https://portal.sw.nat.gov.tw/APGA/GA30>)、生策中心彙整

表 3、臺灣醫衛產品歷年出口新南向 8 國金額及全球市場占比

百萬美元 (全球占比)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
新南向 8 國	835.3 (11.9%)	774.0 (11.1%)	757.6 (10.5%)	871.3 (11.8%)	971.8 (11.9%)	981.2 (11.8%)	977.9 (11.1%)	1,136.4 (10.4%)	1,163.9 (12.3%)	1,006.4 (11.7%)	1,022.5 (12.8%)	1,059.4 (11.8%)
越南	236.8 (3.4%)	218.7 (3.1%)	214.5 (3.0%)	244.4 (3.3%)	261.8 (3.2%)	274.4 (3.3%)	298.2 (3.4%)	312.3 (2.9%)	307.9 (3.3%)	276.0 (3.2%)	289.4 (3.6%)	293.9 (3.3%)
泰國	123.4 (1.8%)	121.9 (1.8%)	128.2 (1.8%)	132.4 (1.8%)	145.3 (1.8%)	140.1 (1.7%)	137.0 (1.6%)	197.8 (1.8%)	227.4 (2.4%)	204.7 (2.4%)	197.2 (2.5%)	207.6 (2.3%)
馬來西亞	149.2 (2.1%)	142.4 (2.0%)	135.1 (1.9%)	156.6 (2.1%)	171.7 (2.1%)	171.5 (2.1%)	155.2 (1.8%)	193.6 (1.8%)	197.9 (2.1%)	168.9 (2.0%)	179.1 (2.2%)	185.4 (2.1%)
菲律賓	84.2 (1.2%)	71.8 (1.0%)	74.3 (1.0%)	113.5 (1.5%)	119.8 (1.5%)	130.6 (1.6%)	135.1 (1.5%)	135.4 (1.2%)	116.1 (1.2%)	77.8 (0.9%)	75.1 (0.9%)	90.2 (1.0%)
印度	121.7 (1.7%)	121.1 (1.7%)	109.5 (1.5%)	124.9 (1.7%)	153.7 (1.9%)	147.0 (1.8%)	136.0 (1.5%)	144.6 (1.3%)	168.1 (1.8%)	155.6 (1.8%)	156.3 (2.0%)	159.6 (1.8%)
印尼	73.6 (1.1%)	75.6 (1.1%)	75.7 (1.1%)	76.8 (1.0%)	93.5 (1.1%)	96.3 (1.2%)	91.6 (1.0%)	134.8 (1.2%)	126.4 (1.3%)	108.7 (1.3%)	113.4 (1.4%)	107.1 (1.2%)
緬甸	43.4 (0.6%)	20.2 (0.3%)	19.5 (0.3%)	22.3 (0.3%)	25.5 (0.3%)	20.8 (0.3%)	23.8 (0.3%)	16.6 (0.2%)	18.9 (0.2%)	14.2 (0.2%)	11.5 (0.1%)	15.0 (0.2%)
汶萊	3.2 (0.0%)	2.4 (0.0%)	0.9 (0.0%)	0.5 (0.0%)	0.5 (0.0%)	0.6 (0.0%)	1.0 (0.0%)	1.4 (0.0%)	1.1 (0.0%)	0.6 (0.0%)	0.4 (0.0%)	0.5 (0.0%)

資料來源：海關進出口統計 HS8 (<https://portal.sw.nat.gov.tw/APGA/GA30>)、生策中心彙整

全球出口格局出現結構性重組，北美崛起、新南向強化、中港澳式微

從長期發展趨勢觀察，臺灣醫衛產品出口呈現明顯的區域結構轉變。中港澳市場由過去的重要核心逐步衰退，長期成長率轉為負值；相對地，新南向市場在政策推動下穩定成長，並展現良好的風險分散功能。

另一方面，北美市場在近年快速崛起，特別是在生技製藥領域形成高度集中效應，帶動全球出口重心向高價值市場移動。

同時，各產品類別呈現不同發展路徑，例如醫療器材與農業食品環保類在新南向市場快速擴張，而健康產業則維持多區域平衡成長，整體顯示全球市場正進入重新分配與功能分工的階段。

表 5、生技製藥類醫衛產品歷年出口全球各市場金額及占比

億美元 (全球占比)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
全球	8.4	8.6	9.4	9.7	10.8	10.5	11.4	12.6	13.8	16.6	13.3	18.1
北美	2.0 (23.5%)	2.0 (23.4%)	2.4 (26.0%)	2.4 (25.0%)	2.6 (24.3%)	2.6 (24.9%)	3.0 (26.7%)	2.7 (21.7%)	4.0 (28.9%)	6.8 (40.9%)	3.9 (29.2%)	9.1 (50.2%)
新南向 18 國	2.2 (25.8%)	2.4 (28.1%)	2.2 (23.7%)	2.2 (22.5%)	2.5 (23.2%)	2.3 (21.9%)	2.4 (20.7%)	2.8 (21.9%)	2.6 (19.1%)	2.4 (14.2%)	2.6 (19.6%)	2.5 (13.6%)
中港澳	1.3 (15.4%)	1.3 (15.2%)	1.4 (15.5%)	1.8 (18.6%)	1.9 (17.2%)	1.8 (17.6%)	1.9 (16.5%)	2.2 (17.8%)	2.5 (18.0%)	2.6 (15.4%)	2.6 (19.2%)	2.3 (12.9%)
日韓	1.1 (12.9%)	1.1 (13.0%)	1.2 (13.2%)	1.3 (13.6%)	1.5 (13.9%)	1.6 (15.0%)	1.8 (15.5%)	2.0 (16.1%)	2.5 (18.0%)	2.7 (16.0%)	2.1 (15.9%)	2.0 (11.1%)
歐洲	1.2 (14.1%)	1.1 (13.1%)	1.5 (15.6%)	1.4 (14.1%)	1.6 (15.2%)	1.4 (13.6%)	1.7 (14.7%)	2.0 (16.3%)	1.3 (9.7%)	1.5 (9.0%)	1.5 (11.1%)	1.5 (8.5%)
中東	0.4 (5.1%)	0.4 (4.3%)	0.3 (3.7%)	0.3 (3.6%)	0.4 (3.7%)	0.4 (3.9%)	0.4 (3.3%)	0.4 (3.4%)	0.5 (3.3%)	0.3 (2.0%)	0.3 (2.2%)	0.3 (1.7%)
其他國家	0.3 (3.2%)	0.3 (3.0%)	0.2 (2.3%)	0.2 (2.5%)	0.3 (2.5%)	0.3 (3.1%)	0.3 (2.6%)	0.3 (2.8%)	0.4 (3.0%)	0.4 (2.4%)	0.4 (2.9%)	0.4 (2.1%)

資料來源：海關進出口統計 HS8 (<https://portal.sw.nat.gov.tw/APGA/GA30>)、生策中心彙整

表 7、醫療器材類醫衛產品歷年出口全球各市場金額及占比

億美元 (全球占比)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
全球	20.1	21.3	23.6	24.7	28.7	28.4	29.4	34.9	35.3	32.1	30.4	33.1

億美元 (全球占比)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
北美	5.5 (27.1%)	5.8 (27.2%)	5.9 (25.1%)	5.6 (22.9%)	6.1 (21.2%)	6.5 (22.8%)	7.0 (23.8%)	8.2 (23.4%)	9.0 (25.6%)	8.4 (26.1%)	7.4 (24.4%)	9.0 (27.1%)
新南向 18 國	2.0 (10.2%)	2.3 (10.6%)	2.5 (10.4%)	2.5 (10.1%)	2.9 (10.1%)	2.7 (9.4%)	2.9 (9.7%)	3.5 (10.0%)	3.4 (9.5%)	3.2 (9.8%)	3.2 (10.5%)	3.8 (11.4%)
中港澳	3.2 (16.2%)	3.6 (16.9%)	4.7 (19.8%)	5.5 (22.4%)	7.6 (26.6%)	7.1 (24.9%)	6.9 (23.6%)	9.0 (25.9%)	8.4 (24.0%)	6.8 (21.1%)	6.7 (22.0%)	5.5 (16.7%)
日韓	3.2 (15.7%)	3.3 (15.6%)	3.6 (15.4%)	4.1 (16.6%)	4.5 (15.6%)	4.4 (15.6%)	4.1 (14.1%)	4.7 (13.4%)	5.1 (14.4%)	5.3 (16.4%)	5.0 (16.6%)	6.0 (18.2%)
歐洲	4.6 (23.0%)	4.7 (22.2%)	5.3 (22.3%)	5.1 (20.8%)	5.6 (19.4%)	5.6 (19.8%)	6.1 (20.7%)	7.0 (19.9%)	7.0 (19.9%)	6.5 (20.3%)	6.2 (20.4%)	6.7 (20.4%)
中東	0.8 (4.0%)	0.8 (4.0%)	0.9 (3.7%)	0.8 (3.3%)	0.8 (2.6%)	0.8 (2.7%)	0.8 (2.7%)	0.8 (2.4%)	0.7 (2.1%)	0.7 (2.0%)	0.6 (2.1%)	0.6 (1.7%)
其他國家	0.8 (3.8%)	0.7 (3.5%)	0.8 (3.3%)	1.0 (4.0%)	1.3 (4.5%)	1.3 (4.7%)	1.6 (5.4%)	1.8 (5.0%)	1.6 (4.5%)	1.3 (4.2%)	1.2 (4.1%)	1.5 (4.5%)

資料來源：海關進出口統計 HS8 (<https://portal.sw.nat.gov.tw/APGA/GA30>)、生策中心彙整

表 9、健康產業類醫衛產品歷年出口全球各市場金額及占比

億美元 (全球占比)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
全球	28.9	28.0	27.8	28.3	28.0	29.7	34.1	45.8	29.3	23.8	22.7	24.6
北美	7.2 (24.8%)	7.6 (27.3%)	7.8 (28.1%)	8.6 (30.4%)	9.4 (33.7%)	11.5 (38.8%)	15.2 (44.6%)	24.7 (54.0%)	11.3 (38.5%)	8.6 (36.2%)	8.1 (35.8%)	9.0 (36.8%)
新南向 18 國	3.9 (13.6%)	3.6 (13.0%)	3.5 (12.6%)	4.0 (14.2%)	4.0 (14.3%)	3.9 (13.3%)	4.2 (12.2%)	4.3 (9.5%)	4.2 (14.4%)	3.8 (16.0%)	3.5 (15.5%)	3.8 (15.5%)
中港澳	7.9 (27.5%)	7.4 (26.5%)	7.3 (26.3%)	7.1 (25.2%)	6.3 (22.4%)	5.8 (19.6%)	6.0 (17.5%)	6.1 (13.3%)	5.6 (19.1%)	3.9 (16.5%)	4.0 (17.5%)	4.4 (17.8%)
日韓	3.4 (11.8%)	3.3 (11.9%)	3.3 (12.0%)	2.8 (10.0%)	2.5 (9.0%)	2.5 (8.5%)	2.5 (7.5%)	3.1 (6.7%)	2.8 (9.5%)	2.6 (11.1%)	2.4 (10.8%)	2.6 (10.5%)
歐洲	4.5 (15.6%)	4.3 (15.2%)	4.3 (15.4%)	4.3 (15.0%)	4.5 (15.9%)	4.6 (15.4%)	4.9 (14.5%)	6.3 (13.8%)	4.2 (14.3%)	3.7 (15.5%)	3.6 (15.9%)	3.7 (15.0%)
中東	1.0 (3.4%)	0.9 (3.4%)	0.9 (3.1%)	0.8 (2.7%)	0.6 (2.3%)	0.7 (2.3%)	0.6 (1.7%)	0.6 (1.3%)	0.5 (1.9%)	0.5 (2.3%)	0.5 (2.1%)	0.4 (1.8%)
其他國家	1.0 (3.4%)	0.8 (2.7%)	0.7 (2.5%)	0.7 (2.4%)	0.7 (2.4%)	0.6 (2.1%)	0.7 (2.0%)	0.6 (1.4%)	0.7 (2.3%)	0.6 (2.5%)	0.6 (2.4%)	0.6 (2.5%)

資料來源：海關進出口統計 HS8 (<https://portal.sw.nat.gov.tw/APGA/GA30>)、生策中心彙整

表 11、農業食品環保類醫衛產品歷年出口全球各市場金額及占比

億美元 (全球占比)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
全球	12.6	11.6	11.1	11.5	13.9	14.4	13.3	15.7	15.9	13.8	13.4	13.6
北美	1.3 (10.4%)	1.4 (11.8%)	1.2 (10.7%)	1.3 (11.4%)	1.3 (9.5%)	1.3 (8.7%)	1.4 (10.6%)	2.3 (14.4%)	2.5 (15.4%)	2.3 (16.6%)	1.9 (14.1%)	2.0 (14.8%)
新南向 18 國	4.1 (32.9%)	3.3 (28.7%)	3.2 (29.2%)	3.7 (32.0%)	4.4 (31.5%)	4.6 (32.0%)	4.4 (33.0%)	5.3 (33.4%)	5.4 (33.8%)	4.5 (32.9%)	4.8 (35.9%)	4.9 (35.6%)
中港澳	3.4 (27.2%)	3.2 (27.6%)	3.2 (28.8%)	3.3 (28.9%)	4.8 (34.2%)	4.8 (33.1%)	3.9 (29.3%)	4.0 (25.4%)	3.2 (20.3%)	3.2 (22.9%)	3.6 (27.1%)	3.4 (25.2%)
日韓	2.2 (17.4%)	2.1 (18.1%)	2.0 (17.7%)	2.0 (17.7%)	2.3 (16.2%)	2.3 (16.0%)	2.3 (17.1%)	2.5 (15.9%)	2.6 (16.5%)	1.9 (13.5%)	1.4 (10.1%)	1.5 (11.0%)
歐洲	0.6 (4.9%)	0.6 (5.2%)	0.6 (5.7%)	0.6 (5.0%)	0.5 (3.7%)	0.5 (3.7%)	0.5 (3.7%)	0.9 (5.7%)	1.2 (7.7%)	1.2 (8.6%)	1.0 (7.4%)	1.1 (7.8%)
中東	0.2 (2.0%)	0.3 (2.2%)	0.2 (1.8%)	0.1 (1.3%)	0.1 (0.8%)	0.2 (1.1%)	0.2 (1.3%)	0.1 (0.6%)	0.1 (0.5%)	0.1 (1.1%)	0.1 (0.8%)	0.1 (0.8%)
其他國家	0.7 (5.3%)	0.7 (6.4%)	0.7 (6.1%)	0.4 (3.7%)	0.6 (4.1%)	0.8 (5.3%)	0.7 (4.9%)	0.7 (4.5%)	0.9 (5.9%)	0.6 (4.4%)	0.6 (4.5%)	0.7 (4.8%)

資料來源：海關進出口統計 HS8 (<https://portal.sw.nat.gov.tw/APGA/GA30>)、生策中心彙整

未來應強化雙核心市場分工與區域深化，以提升長期競爭力與出口韌性

面對全球市場重組趨勢，臺灣醫衛產業未來發展應聚焦於強化「北美 + 新南向」雙核心市場的協同布局。

一方面，以北美市場作為高價值與技術導向的發展核心，提升產品附加價值與國際競爭力；另一方面，持續深化新南向市場的在地布局，包括法規對接、通路合作、供應鏈在地化與服務體系建置，以強化市場滲透與穩定需求。

同時，透過制度型優勢（如醫材認證、永續與品質標準）建立市場進入門檻，並推動國別差異化策略，提升整體出口效率與抗風險能力，確保在全球供應鏈變動下維持穩定成長。