

# Healthcare Market in India

Emerging Trends, Role of Technology and New Opportunities

- ❖ Report (PDF)
- ❖ Data-set (Excel)

## Key Takeaways

- ❖ The healthcare sector has seen a lot of activity in the past three to four years. The size of the sector in India is estimated to have grown from \$45 billion in 2008 to around \$110 billion as of 2016, at a CAGR of around 12%.
- ❖ The size of the diagnostics market meanwhile, as per industry estimates, stands at around \$7-8 billion.
- ❖ India continues to lag on several health indicators relating to mortality rates and malnutrition. Public health expenditure is only about 1.2-1.4% of the GDP.
- ❖ The country's bed density per 1,000 population is low at 1.3 as per National Health Profile (NHP) 2018 when compared to the global average of 2.7.

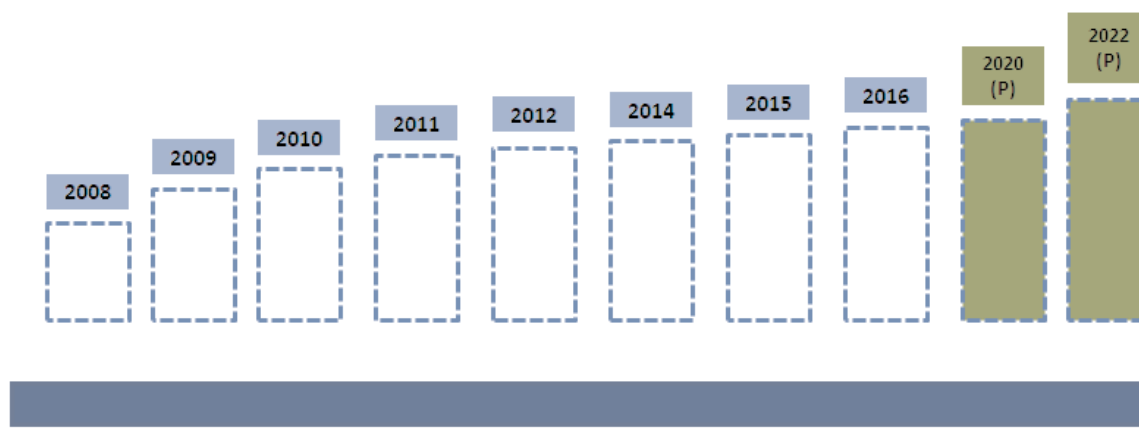
## Conducive Measures and Big Steps

- ❖ The government has made strategic interventions to ensure quality and affordable healthcare. A number of initiatives aimed at providing low-cost services have been undertaken.
- ❖ The National Health Policy 2017, will serve as a framework for achieving universal health coverage and delivering quality healthcare.
- ❖ The government's National Health Mission (NHM) is aimed at providing effective healthcare to both the urban and rural population. The government is also providing policy support in the form of reduced excise and customs duty, and exemption in service tax, to support growth in healthcare.
- ❖ In September 2018, Ayushman Bharat was launched to provide universal health coverage. The scheme is expected to benefit about 40% of the population to begin with.
- ❖ The role of information technology is a much touted game changer for the sector. IOT in healthcare, e-health, m-health, virtual clinics, remote surgeries, robotic operations, EMRs, EHRs, Aadhar integration, big data analytics on the EMRs, advance prediction of an outbreak, promoting generic drugs, auto sutures are making inroads into the segment.

## Segment Outlook

- ❖ The target to increase the share of healthcare spending to 2.5 per cent of the GDP by 2020-22.
- ❖ The healthcare market is all set for an expansion at the back of rising disease incidence across the country. The size of the Indian healthcare sector is expected to register a CAGR of 16-17% (from the 2008 levels) and grow to \$372 billion by 2022.
- ❖ India will continue to enjoy the low-cost advantage in the medical tourism market and is expected to more than double by 2020. The next few years will also see an IT revolution in the sector.
- ❖ The telemedicine market in India is expected to grow at a CAGR of 20% to reach \$32 million by 2020. The m-health market has also been growing at a rapid pace, driven by start-up ventures.
- ❖ Meanwhile, the rising geriatric population, increasing incidence of lifestyle diseases, growth in medical tourism and increasing health insurance penetration will drive the demand for diagnostics services.

### Growth in Healthcare Market Size (\$ billion)



## Executive Summary

### SECTION I: TRENDS, ANALYSIS AND OPPORTUNITIES

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- ❖ Government's Plans and Progress
- ❖ Issues and Challenges
- ❖ Segment Outlook

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  - Max Healthcare Institute
  - Fortis Healthcare Limited
  - HealthCare Global Enterprises Limited (HCG)
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  - Narayana Hrudayalaya Limited
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- ❖ Issues and Challenges
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- ❖ e-Hospital Project
- ❖ Health Apps
- ❖ Outlook

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