

Healthcare Market in India

Emerging Trends, Role of Technology and New Opportunities

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Executive Summary

The Indian healthcare sector is currently at an inflection point. While a huge demand-supply gap exists, rising government expenditure backed by a sound policy regime are expected to provide impetus to the sector. Besides, increasing private sector interest and focus on the deployment of innovative technology solutions will further drive growth into the market. The report will highlight the emerging opportunities in this space and the growing role of new technologies like big data, IoT and artificial intelligence.

SECTION I: TRENDS, ANALYSIS AND OPPORTUNITIES

1. Market Overview

A large segment of the population is deprived of primary healthcare facilities. The government, on its part has initiated several measures to step up expenditure on the healthcare sector. At the same time, the share of private sector is increasing both in terms of delivery of healthcare services as well as deployment of new technologies. Currently, it has become the largest sector in terms of both employment and revenues and there is significant scope for enhancing the services going forward. This chapter will cover the following areas:

- ❖ Current Status of Healthcare Infrastructure
- ❖ Demand-Supply Gap
- ❖ Trends in Expenditure
- ❖ Industry Structure and Role of Private Sector
- ❖ Recent Trends and Developments
- ❖ Investment Needs and Requirements
- ❖ Government's Plans and Progress
- ❖ Issues and Challenges
- ❖ Segment Outlook

2. Policy Framework and Government Initiatives

The government has created a supporting policy and regulatory framework to encourage sector development through a variety of incentives and initiatives. A number of programmes have been launched by the government to promote the development of the sector in both urban and rural areas. This chapter will cover the following areas:

- ❖ Institutional Framework
- ❖ Existing Policy Framework
- ❖ Key Government Programmes*
- ❖ National Health Policy, 2017
 - Policy Features
 - Priority Areas and Potential Benefits
- ❖ Recent Initiatives (National Health Profile 2018, National eHealth Authority, National Health Resource Repository, etc.)
- ❖ Permissions and Licences
- ❖ Incentives for Private Sector

**(This section will provide an update on key government programmes such as National Health Mission, National Urban Health Mission, National Rural Health Mission, Pradhan Mantri Swasthya Suraksha Yojana, Rashtriya Swasthya Bima Yojana, National Health Protection Scheme, and Intensified Mission Indradhanush)*

3. Investment Experience and Financing Trends

The sector has been witnessing increased investments from private equity and venture capitalist funds. FDI and private equity have emerged as the most prominent sources of funding for private healthcare in India. While companies are experimenting with new business models, a few have taken the IPO route to tap funds. This chapter will cover the following areas:

- ❖ Key Financing Trends
- ❖ Trends in Government Funding
- ❖ PPP Experience So Far
- ❖ Debt Financing in Healthcare
- ❖ Recent IPOs
- ❖ Emerging Business Models
- ❖ FDI in Healthcare
 - Trends in FDI Inflow
 - FDI in Hospitals and Diagnostics
 - Key Contributors (Africa, Middle East, etc.)
- ❖ Private Equity Inflow
 - Historic Trends
 - Scenario in the Last Few Years
 - Trends in Hospitals and Diagnostics
 - Trends in PE Exits
 - Recent PE Deals
 - Historical and Expected Rates of Returns
- ❖ Trends in Foreign Venture Capital Investment
- ❖ Key Mergers and Acquisitions
- ❖ Investment Outlook

4. Outlook, Opportunities and Projections (till 2022-2023)

Unmet demand for healthcare will offer huge opportunities going forward. Factors such as growing life expectancy, rising middle class, increasing rate of lifestyle diseases will boost the consumption of both private and public healthcare services. This chapter will cover the following areas:

- ❖ Growth Drivers
- ❖ Healthcare Market Size Projections
- ❖ Future Requirement for Hospital Beds
- ❖ Project Pipeline
 - Hospitals (by ownership, state, status)
 - Diagnostics
- ❖ Opportunities for Key Stakeholders
 - Hospital Infrastructure
 - Diagnostics/Pathology Centres
 - Health Insurance
 - Pharmacies
 - Technology-Driven Services
 - Others

SECTION II: SEGMENT ANALYSIS AND OUTLOOK

5. Public Healthcare

In the wake of growing healthcare needs of the population, the current healthcare infrastructure established by the government has a long way to go to achieve the required numbers and quality standards. There is a widening gap between the availability of government hospitals and beds, both in rural and urban areas, and the growing healthcare demands. This chapter will cover the following areas:

- ❖ Current Infrastructure
 - Hospital Beds
 - Workforce
 - Hospitals, Clinics and Blood Banks
 - Pharmacies
 - Diagnostics/Pathology Centres
- ❖ Rural Infrastructure
- ❖ Urban Infrastructure
- ❖ Recent Developments and Plans
- ❖ Key Players
- ❖ Issues and Challenges
- ❖ Segment Outlook

6. Private Healthcare

Private sector plays an important role in service delivery and meeting the investment requirement. The sector dominates the market in terms of expenditure on the consumption side as well as in terms of investments in delivery of healthcare infrastructure and services. It has grown across the value chain, hospitals being the largest segment. This chapter will cover the following areas:

- ❖ Current Infrastructure
 - Hospital Beds
 - Workforce
 - Hospitals, Clinics and Blood Banks
 - Pharmacies
 - Diagnostics/Pathology Centres
- ❖ Growth in Private Spending
- ❖ Rural and Urban Market
- ❖ Recent Trends
- ❖ Key Players
- ❖ Issues and Challenges
- ❖ Segment Outlook

7. Health Insurance

While less than a quarter of the population is currently covered through insurance, the penetration of the insurance market is expected to increase considerably in the coming years. The launch of government - sponsored health insurance schemes is expected to further the reach of health insurance. This chapter will cover the following areas:

- ❖ Current Status
- ❖ Health Insurance Penetration
- ❖ Health Insurance Premium Trends
- ❖ Market Composition: Private, Public and Standalone Health Insurance
- ❖ State-level Initiatives
- ❖ Deficiencies in Rural and Urban Market
- ❖ Recent Developments

- ❖ Key Players
- ❖ Issues and Challenges
- ❖ Segment Outlook

SECTION III: EMERGING GROWTH AREAS AND ROLE OF TECHNOLOGY

8. New Areas - Progress and Opportunities

The Indian market needs innovative ways to compensate for the shortages in the current healthcare infrastructure. The sector offers huge potential to leverage mHealth and Tele-medicine as alternative healthcare delivery channels.

- ❖ Tele-medicine
 - Experience So Far
 - Case Studies
 - Upcoming Opportunities
 - Key Challenges
- ❖ Medicities
 - Experience So Far (Gurugram, Lucknow, Nagpur, Durgapur, Chennai, Bengaluru, etc.)
 - Case Studies
 - Upcoming Opportunities
 - Key Challenges
- ❖ Growth in Medical Tourism
 - Experience So Far
 - Government Initiatives
 - Upcoming Opportunities
 - Key Challenges
- ❖ Launch of Air Dispensaries

9. Information Technology in Healthcare

The next few years will see an IT revolution in the healthcare sector. Technology will contribute substantially to bring about a sea change in service delivery. Deployment of technology like artificial intelligence, big data, cloud computing to improve patient-centric healthcare systems is already on the rise. This chapter will cover the following areas:

- ❖ Technology Penetration in Healthcare Ecosystem
- ❖ IoT for Asset Tracking & Inventory Management Systems
- ❖ Patient-centric Healthcare Systems
 - Big Data (Value-based Healthcare, Predictive Analytics, Real-time Patient Monitoring)
 - Cloud Computing
 - Wearable Technology
 - Artificial Intelligence
 - Robotic Surgeries
- ❖ Technology in Healthcare Reporting
 - Personal Health Records
 - Electronic Medical Records
 - Electronic Prescriptions
- ❖ mHealth
- ❖ Digital Pharmaceuticals
- ❖ e-Hospital Project
- ❖ Health apps

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