

Opportunities in the Indian Healthcare Market 2019-20

Segment Analysis and Outlook: Infrastructure, Technology,
Equipment and Insurance

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Executive Summary

The healthcare market in India is all set to witness tremendous growth. In a bid to provide a fillip to investments and improve service delivery, the government has initiated ambitious reforms in the sector. The target is to increase government spending on healthcare to about 2.5 per cent of GDP by 2025.

The Ayushman Bharat programme for providing universal health insurance coverage aims to benefit about 40 per cent of the population to start with. The objective of the National Health Mission is to provide effective healthcare to both the urban and rural population.

Encouraged by the opportunity presented by the increasing demand for tertiary care and specialty hospitals, investors are putting in the required capital for reaping high returns. Technology has played a big role in this in recent years. IoT in healthcare, e-health, virtual clinics, remote surgeries, robotic operations, EMRs, EHRs, Aadhar integration and big data analytics are making inroads into the healthcare sector. Going forward, India will continue to enjoy the low-cost advantage in the medical tourism market, which is expected to more than double by 2020. Medical tourism is also a part of expansion strategies of many large hospital chains. At the same time, the development of medicities, IT and communication-based healthcare platforms and services, and applications such as mHealth and telemedicine will continue to unfold significant opportunities for stakeholders across the board.

SECTION I: TRENDS, DEVELOPMENTS AND MARKET ANALYSIS

1. Market Overview

- ❖ Current Status: Coverage, Infrastructure Creation & Spending
 - Public Healthcare
 - Private Healthcare
- ❖ Demand-Supply Gap
- ❖ Budget 2019-20 Announcements
- ❖ Industry Structure
- ❖ Recent Developments
- ❖ Emerging Trends
- ❖ Issues and Challenges
- ❖ Future Outlook

2. Government Policies, Plans and Progress

- ❖ Policy and Institutional Framework
- ❖ Impact of GST
- ❖ National Health Profile 2018
- ❖ National Health Policy, 2017
 - Key Features
 - Priority Areas and Targets
 - Key Benefits and Impact
- ❖ National Health Mission
 - Scope and Key Components
 - Key Achievements and Targets
 - Role of Private Players
- ❖ Ayushman Bharat Yojana
 - Scope and Key Components
 - Progress So Far

- Issues and Challenges
- Future Targets
- ❖ Other Key Government Programmes

3. Sector Outlook and Key Projections (2024-25)

- ❖ Growth Drivers
- ❖ Projected Healthcare Market Size by 2024-25
- ❖ Future Capacity Projections
- ❖ Investment Projections
- ❖ Sector Outlook

4. Project Pipeline and Market Opportunities

- ❖ Pipeline Analysis
 - By Ownership (Public and Private)
 - By Category (Hospitals, Super Specialties & Medicities, Pathology Centres, etc.)
 - By Location
 - By Status
- ❖ Market Opportunities in Key Segments
 - AI and Machine Learning
 - Data Analytics
 - Health Apps and mHealth
 - Telemedicine
 - Medical Tourism
 - Medical Device and Equipment
 - Others

5. Investment Experience

- ❖ Healthcare Spending Trends
- ❖ Private Investment & Role of PPPs
- ❖ Emerging Business Models
- ❖ Financing Trends
 - Debt Funding
 - Private Equity Deal Scenario
 - Recent IPOs
 - Mergers and Acquisitions
 - FDI Inflow
 - Others
- ❖ New and Innovative Funding Sources
- ❖ Role of Global Investors
- ❖ Risks and Returns
- ❖ M&A Opportunities
- ❖ Investment Outlook

SECTION II: HEALTHCARE INFRASTRUCTURE: SEGMENT ANALYSIS AND OPPORTUNITIES

6. Hospitals

- ❖ Growth in the Past Five Years
- ❖ Recent Trends
- ❖ Key Completed Projects
- ❖ Expected Capacity Addition
- ❖ Key Players
- ❖ Future Investment Requirement
- ❖ Top Upcoming Projects

- ❖ Issues and Challenges
- ❖ Future Outlook
- ❖ Market Opportunities

7. Super Specialties and Medicities

- ❖ Growth in the Past Five Years
- ❖ Key Completed Projects
- ❖ Case Studies
- ❖ Key Players
- ❖ Top Upcoming Projects
- ❖ Segment Outlook
- ❖ Market Opportunities

8. Diagnostics and Pathology Centres

- ❖ Segment Overview
- ❖ Key Trends and Financings
- ❖ Growth in Private Spending
- ❖ Key Players
- ❖ Top Upcoming Projects
- ❖ Market Opportunities

SECTION III: EQUIPMENT AND INSURANCE MARKET: PROGRESS, OPPORTUNITIES AND PROJECTIONS

9. Medical Device and Equipment Industry

- ❖ Market Size and Growth
- ❖ Growth Drivers
- ❖ Key Players
- ❖ Types of Medical Devices and Equipment
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 - Consumables
 - Patient Aids
 - Orthopaedic Prosthetics
 - Dental Products
 - Others
- ❖ Upcoming Medical Equipment Manufacturing Projects
- ❖ Market Projections for Key Medical Equipment (Till 2024-25)
- ❖ Industry Outlook

10. Health Insurance

- ❖ Evolution of Health Insurance
- ❖ Health Insurance Penetration
 - Industry-level Analysis
 - Trends in Life, Non-life and Industry
- ❖ Health Insurance Premium Trends
- ❖ Impact of National Health Protection Scheme
- ❖ Gross Premium Written and Incurred Claims Ratio
- ❖ Market Composition – Trends in Public, Private and Standalone Health Insurance
- ❖ State-level Initiatives
- ❖ Recent Developments
- ❖ Key Players
- ❖ Issues and Challenges
- ❖ Outlook and Future Prospects

SECTION IV: DIGITAL HEALTHCARE, ROLE OF TECHNOLOGY & EMERGING GROWTH AREAS

This section will feature views of key personnel from the healthcare industry and technology providers on the growing role of AI, robotics, data analytics and healthcare applications.

11. Artificial Intelligence: Potential and Opportunities

- ❖ The Experience So Far
- ❖ Key Applications
 - Type/Product (Hardware & Software)
 - End-users
- ❖ Machine Learning Technologies and Their Impact
- ❖ Expected Impact on Healthcare Landscape
- ❖ Case Studies
- ❖ Key Technology Providers
- ❖ Key Opportunity Areas
- ❖ Potential Barriers
- ❖ Industry Perspective
- ❖ Future Prospects

12. Data Analytics in Healthcare

- ❖ Big Data and IoT
- ❖ Cloud
- ❖ Robotics and Process Automation
- ❖ Blockchain
- ❖ Others

This chapter will cover the current level of penetration of these technologies, key case studies, major players, future potential, upcoming opportunities, industry perspective, key issues and challenges, and future prospects.

13. Healthcare Platforms & Applications: mHealth & Digital Pharmacies

- ❖ The Experience So Far
- ❖ Role of Healthcare Startups
- ❖ mHealth: Progress and Experience
- ❖ Potential for Digital Pharmacies
- ❖ Future Outlook

14. Telemedicine in Healthcare Delivery

- ❖ The Experience So Far
- ❖ Market Size and Growth
- ❖ Case Studies
- ❖ Future Potential and New Opportunities
- ❖ Issues and Challenges
- ❖ Future Outlook

15. Medical Tourism

- ❖ The Experience So Far
- ❖ Market Size and Growth
- ❖ India's Low-cost Advantage
- ❖ Plans of Key Hospitals
- ❖ Future Potential
- ❖ Issues and Challenges

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