

Now Available

Healthcare Infrastructure and Market in India

Segment Analysis, Outlook and Opportunities

Healthcare Infrastructure and Market in India

Table of Contents

1. Executive Summary

SECTION I: MARKET ANALYSIS AND OUTLOOK

2. Sector Overview

- ❖ Current Status of Healthcare
- ❖ Infrastructure Gaps
- ❖ Market Size and Growth
- ❖ Access to Healthcare
- ❖ Industry Structure
- ❖ Spending and Expenditure
 - Spending in India
 - Global Comparison
- ❖ Investment Requirement
- ❖ Role of Private Sector
- ❖ Recent Trends and Developments
- ❖ Issues and Concerns
- ❖ Sector Outlook

3. Size and Growth

- ❖ Hospital Beds
 - Overall Size
 - Bed Density
 - State-wise Analysis
- ❖ Workforce
 - A snapshot
 - Growth in Workforce (2008-14)
 - Doctor-patient Ratio
- ❖ Hospitals, Clinics, and Blood Banks
 - Market Size
 - Infrastructure by City-type
- ❖ Pharmacies - Market Size
- ❖ Diagnostics/Pathology Centres - Market Size

4. Policy and Regulatory Framework

- ❖ Institutional Framework
- ❖ Legislative Framework and Key Regulations
- ❖ Existing Policy Framework
- ❖ National Health Policy, 2015
 - Policy Features
 - Priority Areas
 - Critique
- ❖ Other Important Policies
- ❖ Recent Initiatives
- ❖ Permissions and Licenses Requirement
- ❖ Incentives to Healthcare Sector

5. Outlook, Opportunities and Projections (till 2021-22 and beyond)

- ❖ Growth Drivers
- ❖ Market Size Projections
 - Healthcare Market Size Projections
 - Future Requirement for Hospital Beds
- ❖ Investment Projections

- ❖ Project Pipeline
 - Hospitals (by ownership, state, status)
 - Diagnostics
- ❖ Opportunities for Key Segments
 - Hospitals and Clinics
 - Diagnostics/Pathology Centres
 - Health Insurance
 - Pharmacies
- ❖ Opportunities in New Areas of Growth

SECTION II: FOCUS ON PUBLIC HEALTHCARE

6. Market Size and Analysis

- ❖ Sources of Expenditure
- ❖ Government Spending
 - Actual and Estimate Expenditure
 - Public Spending Components
 - Funding under Five-Year Plans
- ❖ Current Infrastructure
- ❖ Rural Infrastructure
 - Current Scenario
 - State-wise Service Infrastructure
 - Hospitals and Beds
- ❖ Urban Infrastructure
 - Current Scenario
 - State-wise Urban Infrastructure
- ❖ Recent Developments and Plans
- ❖ Key Players
- ❖ Issues and Challenges
- ❖ Segment Outlook

7. Key Government Programmes

- ❖ National Health Mission (NHM)
 - An Introduction
 - Implementation Framework
 - Fund Allocation and Utilisation
 - State-wise Analysis
- ❖ National Urban Health Mission (NUHM)
 - An Introduction
 - Fund Allocation and Release
 - State-wise Analysis
- ❖ National Rural Health Mission (NRHM)
 - Targets and Achievements
 - Fund Allocation and Release
 - State Expenditure
- ❖ Pradhan Mantri Swasthya Suraksha Yojana (PMSSY)
 - Phase-wise Plans and Status
 - Investment and Funding
- ❖ Rashtriya Swasthya Bima Yojana (RSBY)
 - An Introduction
 - Scheme Details and Features
 - Achievements in 2015-16
- ❖ Other Government Programmes

Table of Contents

SECTION III: FOCUS ON PRIVATE HEALTHCARE

8. Market Size and Analysis

- ❖ Private Spending and Market Size
- ❖ Growth in the Last Few Years
- ❖ Current Infrastructure
- ❖ Rural and Urban Market
- ❖ Recent Trends
- ❖ Key Players
- ❖ Issues and Challenges
- ❖ Segment Outlook

9. Investment and Financing

- ❖ Investment Needs and Requirements
- ❖ Private Equity
 - Historic Trends
 - Scenario in 2015
 - Trends in Hospitals and Diagnostics
 - Trends in PE Exits
 - Recent PE Deals
- ❖ Trends in Mergers and Acquisitions
- ❖ FDI in Healthcare
- ❖ Payback Period and Returns
- ❖ Investment Outlook

10. PPP Potential and Way Forward

- ❖ Introduction
- ❖ Current PPP Models
- ❖ Funding for PPP
- ❖ Experience So Far
 - Overall
 - State-level
- ❖ Key PPP Projects
- ❖ Key Thrust Areas for PPP
- ❖ Key Enablers and Constraints
- ❖ Selected Case Studies
- ❖ Outlook and the Way Forward

SECTION IV: OPPORTUNITIES IN EMERGING AREAS

11. Health Insurance Market

- ❖ Insurance Market in India
- ❖ Evolution of Health Insurance
- ❖ Health Insurance in India
 - Penetration of Health Insurance
 - Health Insurance Premium Trends
 - State-wise Analysis
- ❖ Market Composition: Private, Public and Standalone Health Insurance
- ❖ Deficiencies in Rural and Urban Market
- ❖ Recent Developments
- ❖ Key Players
- ❖ Issues and Challenges
- ❖ Segment Outlook

12. Other Emerging Areas

- ❖ The Need for a Change
- ❖ M-Health
 - Key Growth Drivers
 - Cost-benefit Analysis
 - Case Studies
- ❖ Medical Tourism
 - Market Size
 - Growth Drivers
 - Role of Government
 - State Initiatives
 - Role of Private Sector
- ❖ Establishment of Hospitals in Foreign Countries
- ❖ Tele-medicine
 - Market Size
 - Case Studies
 - Key Challenges
- ❖ IT in Healthcare
 - Key IT Solutions
 - Healthcare Reporting Systems and Trends
 - Case Studies
- ❖ Outlook and the Way Forward

SECTION V: KEY PLAYER PROFILES

13. Profiles of Key Private Players

- ❖ Apollo Hospitals Enterprise Limited
- ❖ Care Hospitals Group
- ❖ Columbia Asia Hospitals Private Limited
- ❖ Cygnus Medicare Private Limited
- ❖ Fortis Healthcare Limited
- ❖ Global Hospitals Private Limited
- ❖ Healthcare Global Enterprises Limited
- ❖ Kamineni Hospitals
- ❖ Kovai Medical Center and Hospital Limited
- ❖ Krishna Institute of Medical Sciences Limited
- ❖ Madras Institute of Orthopaedics and Traumatology
- ❖ Manipal Health Enterprises Private Limited
- ❖ Max Healthcare Institute Limited
- ❖ Medanta - The Medicity
- ❖ Metro Group of Hospitals
- ❖ Narayana Hrudayalaya Limited
- ❖ Sterling Hospitals
- ❖ Wockhardt Hospitals

Healthcare Infrastructure and Market in India

List of Tables and Figures

List of Tables

Lag in Overall Healthcare Indicators
Human Resource Employment in Healthcare
Total Population Served by Healthcare Professionals
Key Indian Healthcare Manpower Comparison with Global Average
Key Diagnostic Players and Number of Labs/Centres
4 modes of supply of trade in services
Upcoming Diagnostics/Pathology Projects
Public Spending on Healthcare: Medical and Public Health, Family Welfare, and Others
Key Government Healthcare Infrastructure Parameters in India
Primary Healthcare Infrastructure in India
Other Healthcare Infrastructure (Rural)
Service Infrastructure: Select State-level Data
Key Public Sector Players
Centre and State Share of Funding under NUHM
Targets and Achievements under NRHM up to Eleventh Plan
Allocation by Government Under Items Subsumed Within NRHM
Expenditure under Items Subsumed within NRHM
Status of Construction Work as on February 15, 2016 at Six AIIMS Established Under Phase I of PMSSY
RSBY Achievements during 2015-16
State-wise Share of Private Healthcare Providers in Hospitalised Care
Snapshot of Operations of Leading Private Players in India
Key Private Equity/Venture Capital Deals in India since January 2015
Key M&A Deals in India since January 2015
Pay-back Period and Returns in the Hospital Sector
PPP Initiatives Across Select States
PPP Projects in the Health Sector (Project cost -Rs 50 million and above*)
PPP projects under VGF mechanism with in-principle approval
Health Insurance Premium Split: Share of Top Five States (2014-15)
Comparative Cost of Common Surgeries (\$)
Company Infrastructure Snapshot of AHEL
Key Financials of AHEL (Apollo)
AHEL Expansion Plans for Owned Bed Capacity
Company Infrastructure Snapshot of Care Hospitals Group
Company Infrastructure Snapshot of Cygnus Medicare Private Limited
Company Infrastructure Snapshot of Fortis Healthcare Limited
Key Financials of Fortis Healthcare Limited
Fortis Healthcare's Key Upcoming Greenfield/Brownfield Projects Under Various Stages of Development
Company Infrastructure Snapshot of Global Hospitals Group
Company Infrastructure Snapshot of HealthCare Global Enterprises Limited

Key Financials of HealthCare Global Enterprises Limited
Key Upcoming Projects of HealthCare Global Enterprises Limited
Company Infrastructure Snapshot of Kovai Medical Center and Hospital Limited
Key Financials of Kovai Medical Center and Hospital Limited
Hospitals and Beds of Krishna Institute of Medical Sciences Limited
Company Infrastructure Snapshot of Manipal Health Enterprises Private Limited
Company Infrastructure Snapshot of Max Healthcare Institute Limited
Key Financials of Max Healthcare Institute Limited
Company Infrastructure Snapshot of Medanta - The Medicity
Number of Beds of Metro Group of Hospitals
Company Infrastructure Snapshot of Narayana Health
Key Financials of Narayana Health
Upcoming Facilities of Narayana Health

List of Figures

Comparison of Hospital Bed Density (per 1,000 population) (2006-2012)
Comparison of Workforce Density (per 1,000 population) (2007-2013)
Rural-Urban Split in Government Hospital Beds
Share of Public Healthcare Providers in Rural and Urban Areas (in hospitalised care)
Healthcare Sector Size and Growth in India (\$ billion)
Composition of Healthcare Spending and Expenditure in India
Global Comparison of Total Health Expenditure as percentage of GDP
Global Comparison of Per Capita Health Expenditure (in \$)
Projected Investment Requirement in India (Rs trillion)
Private Sector Participation and Structure in Indian Health Sector
Split Between Formal and Informal Providers in Private Sector
Split Between Corporates and Own-account-enterprises in Private Sector
Public-private Split in Hospitals Beds and Private Beds' Components
Share of States in Total Government Hospital Beds
Growth of Bed Density in India
Bed Density Gap in India vis-à-vis Other Countries and the Global Average
Average Population Served per Government Hospital Bed
Global comparison of physicians per 1,000 population (2007-13)
Growth in Number of Registered Allopathic Doctors (2008-14)
Growth in Number of Registered Dental Surgeons (2008-14)
Growth in Number of Hospitals (in millions)
Share of Government and Private Hospitals
Growth in Number of AYUSH Hospitals
Number of Blood Banks in India
Hospital Infrastructure by City-type (2010)
Growth of Number of Pharmacies

List of Tables and Figures

Market Size of Pharmacies	Private Sector Market Composition in Indian Health Sector
Market Fragmentation of Pharmacies	Year-wise PE Deals in Healthcare Sector
Number of Diagnostic Companies with NABL-accredited Labs	PE Deals Investments in 2016
Market Fragmentation of Diagnostic Companies	Quarter-Wise PE Deals
Market Split of Diagnostic Companies	Sector-Wise PE Investments in Healthcare and Life Sciences in 2015
Expected Healthcare Market Size in a Modest Growth Scenario (\$ billion)	Trends in Number and Value of PE Transactions in Hospitals
Expected Market Size in a High Growth Scenario (\$ billion)	Trends in Number and Value of PE Transactions in Diagnostic Services
Projected Additional Bed Requirement in India (in millions)	Quarter-Wise PE Exits in the Healthcare and Life Sciences Sector
Projected Investment Requirement in India (Rs trillion)	FDI Equity Inflows in the Hospitals and Diagnostics Space
Ownership-Wise Project Pipeline (number of hospitals)	Trends in Life, Non-life and Industry-wide Insurance Penetration
Ownership-Wise Shares in Number of Beds in Pipeline	Share of Healthcare in Non-life Insurance Market in India
State-Wise Share in Number of beds across upcoming hospitals	Growth in Number of People Covered Under Health Insurance
Status-Wise Number of Upcoming Hospitals	Trend in Health Insurance Premium from Private, Public and Standalone Non-life Insurers
Actual and Estimated Public Expenditure on Healthcare	Change in Share of Health Insurance Premium as Per Classification
Component-wise Breakup Under Medical and Public Health 2013-14 (actual) vs. 2015-16 (BE)	Total Health Insurance Premium: Share of Top Five States (2014-15)
Plan-wise Expenditure and Outlay for Departments of MoHFW - Eleventh (2007-12) and Twelfth Plan (2012-17)	Health Insurance Premium from Private Sector Non-life Insurers
Growth of Number of Hospitals and Beds in Rural India	Health Insurance Premium from Public Sector Non-life Insurers
State-wise Distribution of Rural Hospitals	Health Insurance Premium from Standalone Health Insurers
State-wise Distribution of Rural Beds	Percentage Distribution of Rural Population by Coverage of Health Expenditure
Growth of Number of Hospitals and Beds in Urban India	Percentage Distribution of Urban Population by Coverage of Health Expenditure
State-wise Distribution of Urban Hospitals	Total number of wireless subscribers in India (in millions)
State-wise Distribution of Urban Beds	Market Size of Medical Tourism
Trend in Allocation, Release, and Expenditure of NHM Funds (2012-13 to 2015-16)	Telemedicine Market Size in India (\$ million)
State-wise Allocation of NHM Funds (2015-16)	Shareholding Pattern of AHEL (Apollo)
State-wise Release of NHM Funds (2015-16)	Segmental Revenue Split of AHEL (2012 and 2016)
State-wise Utilisation of NHM Funds (2015-16)	Shareholding Pattern of Fortis Healthcare Limited
Percentage Growth in Allocation of NHM Funds for Select States Between 2012-13 and 2015-16	Shareholding Pattern of HealthCare Global Enterprises Limited
Private and Government Share of Total NUHM Costs	Segmental Revenue Split of HealthCare Global Enterprises Limited (2012 and 2016)
Funds allocated and released for NUHM (Rs billion)	Shareholding Pattern of Kovai Medical Center and Hospital Limited
State-wise Funds Allocated and Released for NUHM (Rs billion) in 2014-15 and 2015-16	Revenue from Operations of Kovai Medical Center and Hospital Limited (2012 and 2016)
Plan Outlay for PMSSY	Shareholding Pattern of Max Healthcare Institute Limited
Declining Release of Central Share on Premium Under RSBY	Total Income Split of Max Healthcare Institute Limited (2014 and 2016)
State-wise RSBY Cards and Hospitalisations for 2015-16	Shareholding Pattern of Narayana Health
Private Sector Participation in Indian Healthcare Market	
Private Sector Expenditure Composition in Healthcare Market	
Market Size of Private Sector Hospitals in India	
Private Sector Participation in Hospital Market (%)	
Number of Private Hospital Beds per 1,000 Population	

I would like to purchase the “Healthcare Infrastructure and Market in India” report:

Format (PDF)	Price	GST (18%)	Total
Site Licence (Single Location)	Rs 75,000	Rs 13,500	<input type="checkbox"/> Rs 88,500
Enterprise Licence (Multiple Locations)	Rs 112,500	Rs 20,250	<input type="checkbox"/> Rs 132,750

I am enclosing a cheque/demand draft for Rs _____, vide cheque/demand draft no. _____ drawn on _____ dated _____ in favour of “India Infrastructure Publishing Pvt. Ltd.”

Signature

.....

Name (Block Letters) _____

Designation _____

Company _____

Mailing Address _____

Telephone _____ Mobile _____

Fax _____

E-mail _____

Wire transfer details:

Beneficiary : India Infrastructure Publishing Pvt. Ltd.
Bank Name : The Hongkong and Shanghai Banking Corporation Ltd
Bank Address : R-47, Greater Kailash – 1, New Delhi - 110048
Account No. : 094179587002
Swift Code : HSBCINBB
IFSC Code : HSBC0110006

Contact details:

Dhruba Jyoti Malkhandi
 Manager-Information Products
 India Infrastructure Publishing Pvt. Ltd.
 B-17, Qutab Institutional Area. New Delhi - 110 016. India
 Tel: +91 11 45793069, 41034600, 41034601
 Mobile: +91 8285580343 Fax: +91 11 2653 1196
 Email: dhruv.malkhandi@indiainfrastructure.com