

Healthcare Investment Trends and Market Opportunities

❖ Research Report

The report will help you to:

- ❖ Analyse trends and recent developments
- ❖ Gauge the impact of Covid on investments and business strategies
- ❖ Gather insights and analysis across key segments
- ❖ Understand the past investment trends, risks and returns
- ❖ Assess the immediate and long-term opportunities for investors
- ❖ Identify the market opportunities for key stakeholders

India's healthcare industry has grown at a CAGR of over 20 per cent in the past four to five years. At this rate, the market size is expected to reach USD 372 billion by 2022. Covid-19 will catalyse long-term changes in India's healthcare landscape and give rise to significant innovations. Beyond metropolitan cities, Tier II and III cities present an attractive investment opportunity. Domestic manufacturing of medical devices and equipment are lucrative investment areas as well. The pandemic has also accelerated the adoption of digital technologies, including telemedicine and mobile health. In the recent times, the healthcare sector has seen a lot of interest from private equity investors and venture capitalists. Majority of these investments were in the healthtech segment. The FDI regime has been liberalised with up to 100 per cent under the automatic route in the hospital sector and in the manufacture of medical devices. These factors put together highlight a host of opportunities in the healthcare industry.

Summary and Key Insights

1. Trends, Developments and Market Analysis

- ❖ Current Status: Coverage, Infrastructure Creation & Spending
- ❖ Demand-Supply Gap
- ❖ Impact of Covid-19
- ❖ Key Policies and Programmes
- ❖ New and Emerging Trends
- ❖ Recent Developments
- ❖ Business and Investment Climate
- ❖ Key Challenges
- ❖ Future Outlook

2. Investment Trends and Returns

- ❖ Trends in Spending
- ❖ Private Investment & Role of PPPs
- ❖ Trends in Debt Funding
- ❖ FDI Trends (Past 5 years)
- ❖ Private Equity Deals (Past 5 years)
- ❖ Mergers and Acquisitions (Past 5 years)
- ❖ Recent IPOs
- ❖ Investment Analysis
 - By Investment Type
 - By Segment
 - Investor Type
- ❖ Historical and Expected Returns
- ❖ Opportunities for Global Investors
- ❖ New and Potential Funding Sources
- ❖ Risks and Challenges

3. Future Outlook and Key Projections (2025-26)

- ❖ Growth Drivers in light of the Pandemic
- ❖ Projected Healthcare Market Size by 2025-26
- ❖ Future Capacity Projections
 - Hospitals
 - Super Specialties and Medicities
 - Diagnostics and Pathology Centres

- Medical Device Manufacturing

- ❖ Investment Projections
- ❖ Segment-wise Investment Opportunities
- ❖ Market Opportunities for:
 - Developers
 - Equipment Providers
 - Technology Providers
- ❖ Overall Sector Outlook

4. Hospital Infrastructure

- ❖ Size and Growth
 - Public Hospitals
 - Private Hospitals
- ❖ Demand-Supply Gap
- ❖ Impact of Covid-19
- ❖ Recent Investment Trends
- ❖ Key Players and their Expansion Plans
- ❖ Key Upcoming Projects
- ❖ Upcoming Market Opportunities
 - Tertiary Care Hospitals
 - Hospitals in Tier II and III Cities
 - Super Specialties and Medicities
 - Others
- ❖ Opportunities for Investors
- ❖ Risks and Returns
- ❖ Future Outlook

5. Healthcare Start-ups

- ❖ Focus Areas
- ❖ Impact of Covid-19
- ❖ Recent Investment Trends
- ❖ Top Investment Deals
- ❖ Investment Opportunities
- ❖ Future Plans and Strategies
- ❖ Risks and Challenges
- ❖ Future Outlook

This chapter will also cover profiles of 10-15 top start-ups in the healthcare industry

6. Digital Healthcare

- ❖ Market Size and Growth
- ❖ Recent Investment Trends
- ❖ Top Investment Deals
- ❖ New Initiatives and Use Cases
- ❖ Investments Opportunities in Healthcare Platforms & Applications
- ❖ Growth Drivers for Investment
- ❖ Upcoming Projects
- ❖ Investments Planned under National Digital Health Mission
- ❖ Risks and Challenges
- ❖ Future Outlook

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

7. Medical Devices and Equipment

- ❖ Market Size and Growth
- ❖ Import Trends
- ❖ Regulatory Changes and Enabling Policies
- ❖ Recent Investment Trends
- ❖ Upcoming Medical Equipment Manufacturing Projects
- ❖ Upcoming Market Opportunities
 - Ventilators and Concentrators
 - Medical Imaging Tools
 - Consumables & Disposables
 - Patient Aids
 - Orthopaedics & Prosthetics
 - Dental Products
 - Others
- ❖ Opportunities for Investors
- ❖ Projections for Key Medical Equipment (Till 2024-25)
- ❖ Risks and Returns
- ❖ Future Outlook

8. Diagnostics and Pathology Centres

- ❖ Size and Growth
- ❖ Impact of Covid-19
- ❖ Recent Investment Trends
- ❖ Key Players and their Expansion Plans
- ❖ Upcoming Projects

- ❖ Potential for Miniaturised Diagnostics
- ❖ Upcoming Market Opportunities
- ❖ Opportunities for Investors
- ❖ Risks and Returns
- ❖ Future Outlook

9. Home Healthcare and Telemedicine

- ❖ Market Size and Growth
- ❖ Impact of Covid-19
- ❖ Recent Investment Trends
- ❖ Top Investment Deals
- ❖ Investment Opportunities
- ❖ Future Potential and New projects
- ❖ Issues and Challenges
- ❖ Risks and Challenges
- ❖ Future Outlook

10. Health Insurance

- ❖ Current Scenario
- ❖ Impact of Covid-19
- ❖ Recent Investment Trends
- ❖ Top Investment Deals
- ❖ Ayushman Bharat Yojana: Impact and Targets
- ❖ Health Insurance Penetration
 - Industry-level Analysis
 - Trends in Life, Non-life and Industry TM
- ❖ Health Insurance Premium Trends
- ❖ Market Composition - Trends in Public, Private and Standalone Health Insurance TM
- ❖ Key Players and their Plans
- ❖ Recent Developments TM
- ❖ Opportunities under Digitalisation
- ❖ Future Outlook

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