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India Single Specialty Hospitals and Clinics Industry Outlook to 2019 - Day Care Specialty Clinics to Impel Growth

https://marketpublishers.com/r/I47EF24622CEN.html
Date: November 2014
Pages: 254
Price: US$ 1,400.00 (Single User License)
ID: I47EF24622CEN

Abstracts

The report titled "India Single Specialty Hospitals and Clinics Industry Outlook to 2019- Day Care Specialty Clinics to Impel Growth" presents a comprehensive analysis of the industry covering aspects including market size by revenue and market segmentation by single specialty hospitals and clinics covering therapeutic classes such as Cardiology, Oncology, Orthopedics, Maternity and Urology and dental, eyecare, IVF and kidney dialysis. State wise presence of hospitals in each category is also presented as a segment of the market. A detailed analysis on total number of hospitals in major therapeutic classes, average revenue per bed per day in a therapeutic class, cost of treatments has been provided in the report. The report also entails a detailed description on the recent trends and developments, private equity investments in the sector, growth drivers and challenges and competitive landscape of major players in key therapeutic classes with revenue. Future Prospects of the industry along with future projections have been discussed.

India has the largest number of patients paying out of pocket expenses for medical purposes. This phenomenon has led to the emergence of the 'healthcare consumer' who is treated like a consumer and not just as a patient. The high expectations of healthcare consumers and the rise of branded private hospital chains have led to a shift in the consumer attitude towards doctors and hospitals. The healthcare sector in India which witnessed an initial wave of private investments in tertiary multi specialty hospitals, over the last decade, has witnessed spurring investments in single specialty chains. Some major names in single specialty hospitals in the country include: Fortis Escorts Heart and Research Centre (New Delhi), Tata Memorial Cancer Hospital (Mumbai), Sankara Nethralaya (Chennai), Vasan Eye Care (Chennai), HOSMAT Hospital (Bengaluru) among others.

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Single specialty hospitals and clinics market in India has shown double digit growth rates over the last few years. The market revenue has escalated from INR ~ million in FY'2010 to INR ~ million in FY'2014. The industry has recorded a CAGR of 12.6% over the years FY'2010-FY'2014. Low capital investment and investment friendly business models have led to a spur of investments made in this business in India in the recent years. The share of hospitals in single specialty chains in total market value in the country stood at ~% in FY'2014, demurring from ~% in FY'2010.

Cardiology accounts for the maximum share of ~% in single specialty hospital market in India in terms of revenue, as recorded in FY'2014. Players such as Fortis Escorts Hearth Institute, Frontier Lifeline Hospital, Narayana Hrudayalaya have been recording impressive turnovers in the recent times, thus driving the market for cardiology hospitals in India. Oncology is the second largest revenue contributor to the SSH market in India. Maternity segment, at 4th largest position, was valued at INR ~ million in FY'2014 and has grown from INR ~ million in FY'2010. The specialties' share in the overall SSH market has risen from ~% in FY'2010 to ~% in FY'2014. Urology forms a niche segment of single specialty hospitals industry in India with a share of ~% as recorded in FY'2014, however, the urology single specialty hospitals industry in the country has been displaying double digit growth rates in the past few years. The eyecare single specialty centres industry in India too has showcased stupendous growth of 30.8% over the years FY'2010-FY'2014.

Major healthcare chains such as Fortis healthcare, Apollo Hospitals have invested greatly in setting up single specialty centres for dialysis, maternity centres, and dental care centres in the country in the recent years. Fortis and Apollo have also established maternity centres in the country under the brand names, Fortis La Femme and Apollo Cradle, respectively.

The rapidly evolving single specialty hospital and clinics industry in India will change the facade of the healthcare sector in the coming years. The emergence of single specialty chains across a gamut of sub specialties with business models thriving on the ability to craft a custom solution for a specific requirement, backed by specialized infrastructure and medical personnel's focused on providing quality care to the consumer will continue to drive growth in the coming years.

KEY TOPICS COVERED IN THE REPORT

Market Size of India Single Specialty Hospitals and Clinics Industry by Revenue,

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FY’2010-FY’2014

Market Segmentation by Single Specialty Hospitals (Cardiology, Oncology, Orthopedics, Maternity and Urology) and Clinics (dental, eyecare, IVF and kidney dialysis), FY’2010-FY’2014

Market Size of each therapeutic class (Cardiology, Oncology, Orthopedics, Maternity and Urology, dental, eyecare, IVF and kidney dialysis)

Market Segmentation by States by therapeutic classes: Cardiology, Oncology, Orthopedics, Maternity and Urology, dental and eyecare

List of major hospitals in major therapeutic classes by Bed Strength and State Presence

Detailed Analysis on Investment Required to Set up Single Specialty Hospitals by therapeutic classes

Competitive Landscape of Major Players in each therapeutic class (Covering of No. of beds, Year of Establishment, services offered, revenue)

Growth Drivers and Challenges in the Industry

Private Equity Investments in the Industry

Future Outlook and Projections of India Single Specialty Hospitals and Clinics Industry, FY’2015-FY’2019

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