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Ambulatory Surgery Market In India (2018-2023) with Data on Surgery Type, Day Care Surgery Centers and Outpatient Surgery Center Distribution (Urology, Ophthalmology, Gastroentrology, Orthopedics, Gynecology, Plastic Surgery, ENT, General, Oncology)

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Abstracts

Ambulatory surgery is a surgical procedure that allows patients to return home on the same day of the surgery. Such surgery centers can be either standalone units, or attached/affiliated to hospitals. Currently, with rapid technological advancements in the Indian healthcare sector, ~60% of all surgeries can be performed at short-stay surgery centers. Ambulatory care services are provided at various healthcare facilities like dialysis clinics, ambulatory surgical centers, hospital outpatient departments, and outpatient clinics, among others.

Ambulatory Surgery Market in India (2018-2023)

Global market overview:

As of 2018, 60% of surgeries performed globally are day care or short stay surgeries. The global ambulatory service market is expected to reach INR 242 Tn by 2024, growing at a CAGR of ~6% from INR 155 Tn in 2016.

The major factors boosting the growth of the market are increasing aging population, growing treatment costs, increasing consumer awareness, and high government expenditure on ambulatory care services, among others.

AmSurg Corp., Surgery Partners, Symbion, and IntergraMed America, Inc., among others, are some of the major players operating in the global ambulatory services

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market.

India market overview:

The ambulatory surgery market has immense potential for growth in India, since the country is currently burdened with more than 20% of the world's diseases, but has only 6% of the world's hospital beds. Ambulatory surgery is expected to reduce the average cost of treatment by 70%, when compared to the cost of inpatient surgery.

In the last few years, there has been a significant increase in ambulatory surgery centers in the fields of ophthalmology, gastroenterology, and orthopaedics, among others. It is expected that by 2020, 75% of the surgeries performed in India will be ambulatory surgeries, as compared to 43% in 2016. Hospitals are allotting some of their beds to ambulatory surgery centers, for efficient asset utilization.

Hospital integrated units, hospital autonomous units, hospital satellite units, and freestanding units are the different formats of ambulatory surgery centers in India. Hospital integrated units share facilities like operation theater (OT), outpatient department (OPD), and the healthcare workforce with the hospital, without the nursing staff. Freestanding units are autonomous units that have all the facilities like pharmacies, diagnostic labs, operation theaters, outpatient departments, dedicated workforce, and full-time consultants.

Healthcare centers specializing in eye care, dialysis, and oncology treatment have the same format as ambulatory surgical centers. It is expected that by the end of 2020, more ambulatory surgical centres specializing in oncology will be established in Tier II and Tier III cities in India, to meet the increasing demand for radiation therapy and healthcare consultancy services.

In 2015, the Indian ambulatory surgery market was valued at INR 250 Bn, and it is expected to grow at a CAGR of ~15% during the forecasted period.

Key growth drivers of the market:

The factors driving market growth are high demand for ambulatory care centers in various therapeutic areas, cost-effectiveness, advancements in the healthcare sector, and lack of proper medical facilities in India.

India lacks proper medical facilities for a number of diseases like cataract, cancer, and acute kidney diseases, among others. As of 2016, ~0.2 Mn people needed dialysis treatment every year in India, whereas there were only 0.4 dialysis centers per Mn people. In India, 95% of medical colleges do not provide comprehensive cancer care services that include surgical, medical, and radiation oncology departments, in the same campus. Thus, there is scope to establish more day care centers that will meet the rising demand for healthcare facilities in the country.

As of 2017, medical inflation in India was 15%, while the government's expenditure on healthcare was around 1.4% of the GDP. More ambulatory surgery centers need to be set up to provide surgery treatments on an outpatient basis, thereby reducing expenditure on hospital stays.

The public healthcare system in India is plagued with underfunded hospitals and clinics, and ineffective health schemes. Rising patient inflow from rural areas to metropolitan cities for healthcare services, and lack of hospital beds, have led to the inception of day care surgery or ambulatory surgery centers (ASC). In 2016, it was reported that India had 0.9 hospital beds per 1,000 people, which is lowest among the BRIC nations. These are the key factors driving the growth of ambulatory care services across the country.

Key challenges of the market:

The major challenges affecting market growth are diagnostic errors, and challenges with regard to post-operative care.

Patients have to be diagnosed quickly at ambulatory surgery centres, which can lead to inaccurate diagnosis, and improper treatment by medical practitioners.

Ambulatory surgery centers discharge their patients on the same day of the surgery. This acts as a challenge in providing proper post-operative care and controlling infections may become difficult.

Competitive Landscape:

Some of the key players operating in the market are:

- Dr. Agarwal's Eye Hospital Limited
- Fortis Healthcare Limited

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Apollo Health and Lifestyle Limited

CARE Hospitals Private Limited

Max Healthcare Institute Limited

Sankara Nethralaya Private Limited

Vasan Healthcare Private Limited

Columbia Asia Hospitals Private Limited

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