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Private Healthcare Delivery Sector in India 2020

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Abstracts

The private healthcare delivery sector includes any healthcare services provided by an individual or group that is profitable and is not controlled or operated by the government. It plays a fundamental role in the Indian healthcare sector by serving around 79% of the urban and 72% of the rural population. In terms of revenue, the private healthcare delivery sector in India was valued at INR 11,197.43 Bn in 2019, and is estimated to reach INR 34,135.53 Bn by 2025, expanding at a CAGR of ~16.60% during the 2020 – 2025 period.

Segment insights:

The private healthcare delivery sector has three major segments – the private hospital sector, the private diagnostics sector, and the pharmacy retail sector. The private hospital sector was the largest segment, holding a market share of ~78.11% in 2019. The market share of the private diagnostics segment is estimated to increase sizeably to reach ~12.62% by 2025.

The private hospital sector has witnessed significant growth over the past few years, backed by private equity investments. The major private hospitals in India are concentrated in urban and semi-urban areas. The players in the sector are focusing on expanding their network of super-specialty and multi-specialty hospitals in tier II and tier III cities in India.

The private diagnostics sector is anticipated to exhibit a massive growth over the forecast period, on account of an increase in preventive healthcare and evidence-based treatment in India. The sector is largely fragmented and consists of hospital-based labs, standalone centers, and large diagnostic chains.

Pharmacy retail was the second-leading segment of the private healthcare delivery

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sector in Indian in 2019. An increase in the patient pool of those suffering from chronic illnesses, coupled with better affordability, has driven the pharmacy retail segment. With the improved digital infrastructure of the country, the online pharmacy sub-segment is expected to create immense opportunities in the market.

Impact of COVID-19:

The pandemic has had a huge impact on the private healthcare delivery sector in terms of business operations and financial performance. The enforcement of the stringent lockdown led to a steep decline in the number of patients in private hospitals, as well as diagnostic centers. The cancellation of elective surgeries and the closure of outdoor patient departments have caused a sharp decrease in industry revenue. Furthermore, travel restrictions and the closure of inter-state borders created blockages in the supply chain and logistics. However, strategies, including digital transformation, capacity expansion, and increased collaborations with vendors have improved sustainability and aided the recovery of the sector.

Companies covered:

Apollo Hospitals Enterprise Ltd

Dr. Lal PathLabs Ltd.

Fortis Healthcare Ltd.

HealthCare Global Enterprises Ltd.

Max Healthcare Institute Ltd.

Narayana Hrudayalaya Ltd.

Shalby Ltd.

Netmeds Marketplace Ltd.

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