

Private Hospital Sector in India 2021

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Abstracts

Market insights:

Hospitals are the major stakeholders in India's healthcare ecosystem. About 70% of the rural population and 80% of the urban residents rely on private hospitals. High disposable income, rise in population, and changes in disease profiles are driving the expansion of the market. Furthermore, the Ayushman Bharat initiative has strengthened the healthcare system, from primary to tertiary care. The private hospital sector was valued at INR 9,995.06 Bn in FY 2021. It is expected to reach INR 25,429.49 Bn by FY 2027, expanding at a compound annual growth rate (CAGR) of ~20.53% during the FY 2021 ? FY 2027 period

Segment insights:

It has three segments – self-pay, government payer, and corporate insurer. Initially at the beginning of 2020, the self-pay segment dominated the market, followed by government payer. However, owing to the expansion of insurance coverage by both government and corporate insurers, the corporate insurer segment is anticipated to experience noticeable growth.

Increase in purchasing power, growing demand for quality healthcare, technological advancements, and development of private hospital networks have fueled the growth of corporate medical insurance. It ensures patients' entitlement to accidental hospitalization, COVID-19 insurance, daily hospital benefits, critical illness cover, and maternity coverage.

Impact of COVID-19:

The second wave of COVID-19 affected the private hospital sector because patient

footfall, both, domestic and international, declined. High infection rates and lockdowns compelled hospitals to pause non-emergency, and outdoor patient department (OPD) and indoor patient department (IPD) services. Medical tourism also declined due to travel restrictions.

Despite the initial dip in footfall, signs of recovery in patients and relaxed lockdown norms by the end of July 2021 marked an increase in hospital occupancy rate. Although the initial setback caused a nationwide crisis in India's primary healthcare, key changes in the sector such as flexibility in operations, improved health insurance, and cost-effective medical tourism will strengthen the private hospital sector.

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Companies

Apollo Hospitals Enterprise Ltd.

Aster DM Healthcare Ltd.

Fortis Healthcare Ltd.

HealthCare Global Enterprises Ltd.

Max Healthcare Institute Ltd.
Narayana Hrudayalaya Ltd.
Shalby Ltd.
Columbia Asia Hospitals Pvt. Ltd.
Manipal Health Enterprises Pvt. Ltd.
Medanta The Medicity

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