

# **Hospital Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Ownership (Public v/s Private), By Type (General, Specialty, Multi- Specialty), By Type of Services (In-Patient Services v/s Out-Patient Services), By Bed Capacity (Up to 100 beds, 100-500 beds, Above 500 beds), By Region and Competition**

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## **Abstracts**

Global Hospital Market has valued at USD 4,616.43 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.76% through 2028. Hospitals play a vital role in the healthcare sector, serving as a significant revenue source for the industry and driving research and advancements in the field. Healthcare product manufacturers make substantial investments in marketing campaigns and sales efforts to promote their products and services to hospitals. Private hospitals are increasingly leveraging online and telecommunication networks to deliver high-quality outpatient services, including consultation, diet and medication analysis, and health monitoring. As a result, the quality of outpatient care has steadily improved, and the demand for such services is projected to surpass that of inpatient care in the future.

### **Key Market Drivers**

#### **High Prevalence of Diseases**

The rising incidence of cancer worldwide, along with the growing number of knee replacement surgeries and the availability of next-generation stents, are expected to be major drivers for the global hospital market in the forecast period. The high prevalence of diseases in contemporary society is expected to significantly boost the demand for

hospitals. This trend reflects several interconnected factors that underscore the critical role healthcare institutions play in addressing the growing healthcare needs of populations. The increase in disease prevalence, including chronic conditions, infectious diseases, and non-communicable illnesses, has resulted in a higher demand for medical services. Hospitals serve as central hubs for diagnosing, treating, and managing these health conditions, making them indispensable in the healthcare ecosystem. This surge in demand has led to the expansion and construction of new hospitals to accommodate the growing patient population. The high prevalence of diseases, demographic shifts, pandemic experiences, and evolving patient expectations have collectively contributed to the rising demand for hospitals. Ensuring the availability and accessibility of quality healthcare facilities is essential to meet the healthcare needs of a growing and increasingly health-conscious population.

### Increasing Healthcare Expenditures by Different Governments Across the Globe

The cost of medical facilities has witnessed a significant spike in the past few decades. This can be attributed to the advent of advanced diagnostic technologies that have paved the way for early and improved detection of diseases, such as cancer, as well as supported research for terminal disease treatments. These advancements in diagnostic technologies have enabled medical professionals to identify diseases at earlier stages, leading to more effective and timely interventions. Moreover, the increasing affordability and awareness among people have further fueled the demand for medical services, resulting in a surge in healthcare utilization in many countries. This surge, in turn, contributes significantly to the growth of the Gross Domestic Product (GDP), as the healthcare industry plays a vital role in a nation's economy. As a result, the healthcare industry continues to evolve, with new innovations and developments constantly emerging to meet the growing needs of the population and ensure better healthcare outcomes for all. This includes advancements in telemedicine, personalized medicine, and precision therapies, among others, which aim to provide tailored and targeted treatments for individuals based on their unique genetic and clinical characteristics. The integration of artificial intelligence and machine learning algorithms in healthcare systems is also revolutionizing medical diagnosis, treatment planning, and patient care delivery. These ongoing advancements and developments in the healthcare industry are not only improving the quality of healthcare services but also shaping the future of medicine, promising better health outcomes and enhanced patient experiences.

### Increase In the Penetration of Health Insurance Services

With the increasing cost of healthcare facilities, several developed nations have

established comprehensive health insurance plans to ensure access to quality healthcare services. In North America, healthcare insurance has become an integral and vital sector of the healthcare industry, playing a pivotal role in providing financial coverage and protection to individuals and families. The rising influence of healthcare insurance among consumers and the general public is projected to further spur the demand for these services in the coming years.

Moreover, healthcare services contribute significantly to the overall revenue of the healthcare industry. Various sectors such as pharmaceutical companies, long-term care services, medical devices, medical consumables industry, and healthcare facility management services collectively contribute prominently to the growth and sustainability of the healthcare services market. Among these, hospitals play a crucial role as an end-use segment, capturing a significant consumer base in the healthcare industry.

Hospitals, therefore, are not only an integral part of the healthcare industry but also a major revenue source that drives research and innovation in the field. Healthcare product manufacturers heavily invest in marketing strategies and revenue allocation to promote their products and services to hospitals. Consequently, strategic decisions made within the hospital sector have a notable impact on the other associated industries within the healthcare ecosystem. By continuously improving and expanding healthcare services, hospitals contribute to the overall well-being of individuals and communities, while also driving advancements in medical technology and patient care. Their role extends beyond providing treatment and medical services, as they serve as centers for research, education, and training, fostering collaboration and knowledge exchange among healthcare professionals.

Hospitals hold a significant position in the healthcare industry, serving as crucial pillars of healthcare delivery and acting as catalysts for progress and innovation across the entire healthcare ecosystem.

### Increasing Awareness and Advancements Pertaining To Diagnostic Technologies

The increasing awareness and advancements in diagnostic technologies are expected to play a pivotal role in boosting the demand for hospitals in contemporary healthcare landscapes. The rising awareness among individuals about the importance of early disease detection and preventive healthcare has led to increased demand for diagnostic services. Patients are becoming more proactive in seeking regular check-ups and screenings, often leading to the early detection of conditions that require hospital-based

care. This heightened awareness fosters a culture of preventative medicine, emphasizing the critical role hospitals play in diagnosing and treating health issues. The rapid advancements in diagnostic technologies have expanded the capabilities of healthcare institutions. Innovative imaging modalities, such as advanced MRI, CT scans, and PET scans, offer detailed insights into patient health, aiding in the precise diagnosis of various medical conditions. Hospitals that invest in cutting-edge diagnostic equipment can provide superior healthcare services, attracting patients seeking the most accurate and advanced diagnostics available.

Advancements in molecular diagnostics, genomics, and personalized medicine have revolutionized disease management. These breakthroughs require specialized laboratory facilities and expertise, further driving the demand for hospital-based services. Hospitals are increasingly becoming hubs for conducting advanced genetic testing and molecular analyses, facilitating personalized treatment plans and targeted therapies. The increasing awareness of the importance of early diagnosis and the continuous advancements in diagnostic technologies have synergistically contributed to the rising demand for hospitals. As healthcare continues to evolve, hospitals remain vital hubs for comprehensive and cutting-edge diagnostic services, playing an integral role in improving patient outcomes and overall public health.

## Key Market Challenges

### High Cost of Surgical Procedures

The high cost of surgical procedures has become a significant deterrent, leading to a decrease in the demand for hospital-based healthcare services. This issue highlights several challenges within the healthcare system that affect both patients and healthcare providers. The cost of surgical procedures encompasses various expenses, including surgeon fees, operating room charges, anesthesia, hospital stays, and post-operative care. For many patients, these costs can be overwhelming, especially if they lack adequate health insurance coverage. High out-of-pocket expenses and the potential for medical debt can discourage individuals from seeking necessary surgical treatments.

The lack of price transparency in the healthcare industry exacerbates the issue. Patients often have limited visibility into the actual costs of surgical procedures, making it difficult for them to make informed decisions about their healthcare options. This lack of transparency can lead to surprise bills and financial stress, further discouraging individuals from pursuing surgical interventions. The high cost of surgical procedures impacts healthcare providers. Hospitals face challenges related to revenue generation

and resource allocation. They must invest in expensive medical equipment, maintain healthcare facilities, and hire skilled medical staff. The need to cover these expenses can lead to higher procedural costs, contributing to the overall cost burden on patients.

The high cost of surgical procedures has prompted a shift towards alternative care settings. Outpatient surgical centers and ambulatory care facilities often offer more cost-effective options for certain surgical procedures, as they typically have lower overhead costs compared to traditional hospitals. This trend has reduced the demand for hospital-based surgeries.

### Shortage of Professionals

The shortage of healthcare professionals, particularly doctors, nurses, and specialized medical staff, has had a profound impact on the demand for hospital services. This issue stems from several interconnected challenges that significantly affect the healthcare landscape. The shortage of healthcare professionals directly hampers the capacity of hospitals to provide timely and quality care. Overworked and understaffed hospitals may struggle to meet the growing healthcare needs of their communities. Longer wait times for appointments, delayed surgeries, and limited access to specialized care are some of the consequences of this shortage, which can deter patients from seeking hospital-based services. The shortage of healthcare professionals can lead to burnout among existing staff. Overworked healthcare professionals are more likely to experience fatigue, stress, and job dissatisfaction, which can adversely affect the quality of care they provide. This can lead to concerns about patient safety and overall satisfaction with hospital services.

Moreover, rural and underserved areas are disproportionately affected by the shortage of healthcare professionals. In these regions, limited access to hospitals and medical facilities can result in delayed diagnoses and treatment, leading to poorer health outcomes for residents.

### Key Market Trends

#### Adoption of Digital Health Technologies

Hospitals across the globe have been increasingly embracing digital health technologies, such as electronic health records (EHRs), telemedicine, remote patient monitoring, and mobile health apps. These cutting-edge technologies are specifically designed to revolutionize patient care, streamline operational efficiency, and foster

seamless communication among healthcare professionals. In particular, the COVID-19 pandemic has acted as a catalyst for the rapid adoption of telemedicine services worldwide. Hospitals swiftly implemented robust telehealth platforms to facilitate remote consultations, closely monitor patients' health, and ensure uninterrupted care during the unprecedented times and beyond. Looking ahead, the telephonic case management services are expected to witness the highest demand, prompting suppliers to invest significantly in this area throughout the projection period. Moreover, it is anticipated that the demand for field case management services will exhibit a similar growth trajectory, emphasizing the need for comprehensive and well-rounded healthcare solutions.

### Growth of Specialized and Super-Specialized Hospitals

There has been a significant rise in the number of specialized and super-specialized hospitals, focusing on specific medical areas such as cancer treatment, cardiovascular care, orthopedics, and women's health. These hospitals cater to specific medical needs and provide advanced treatments and state-of-the-art facilities. Hospitals are increasingly prioritizing patient-centric care, aiming to enhance the patient experience and satisfaction. Strategies like patient engagement, personalized treatment plans, and improved communication between patients and healthcare providers are being implemented to achieve this objective.

The healthcare sector is undergoing substantial transformation due to the rapid proliferation of technology. As the strain on the healthcare infrastructure intensifies, there is a growing need for better management services from both patients and healthcare institutions. Hospital service providers are placing a strong emphasis on delivering products and services that meet individual needs while also being cost-effective and efficient in healthcare delivery.

### Segmental Insights

#### Ownership Insights

The market has been segmented based on hospital ownership type, specifically public and private hospitals. The hospital market structure has been influenced by the privatization of the hospital industry in the U.S. and U.K. Many retail clinics are affiliated with private hospitals. On a global scale, the hospital ownership segment reflects the revenue generated by different types of hospital institutions in each region.

The hospital market is expected to demonstrate growth, primarily driven by private and

public hospitals. Public hospitals continue to hold the largest market share worldwide. These hospitals have a significant number of patient beds and provide specialized departments catering to various service areas and medical conditions. However, in the future, especially in developed regions, these hospitals are projected to experience a declining market share.

### Type of Services Insights

Based on type of services, the market is segmented into in-patient services v/s out-patient services. The outpatient services segment is anticipated to experience the fastest growth during the forecast period. Outpatient services encompass a wide range of medical procedures, tests, and services that can be provided to patients without requiring an overnight hospital stay. This convenient and efficient approach not only allows for shorter patient stays but also helps mitigate the high costs associated with inpatient services. Moreover, the increasing adoption of minimally invasive surgical procedures and the continuous advancements in surgical equipment and devices are playing a pivotal role in bolstering the growth of the outpatient services segment. The ability to provide timely and effective healthcare services while minimizing patient inconvenience and reducing healthcare expenses makes outpatient services a crucial component of the healthcare industry.

### Regional Insights

In 2022, North America emerged as the dominant region in the market. This can be attributed to the rising cost of medical services and the increasing incidence of cancer, which are expected to drive market growth during the forecast period. However, it is worth noting that Asia Pacific is anticipated to witness the fastest growth over the same period. This growth can be attributed to several factors, including the continuous improvement in the quality of hospital services and the rising number of private players in countries such as China, India, and Thailand. These factors together are expected to fuel the growth of the regional market, making it a promising area to watch in the coming years.

### Key Market Players

Ramsay Health Care Limited

Community Health Systems, Inc.

Spire Healthcare Group plc

Tenet Healthcare Corporation

Universal Health Services, Inc.

IHH Healthcare Berhad

Apollo Hospitals Enterprise Limited

HCA Healthcare, Inc.

Fresenius SE & Co. KGaA

ORPEA Group

Report Scope:

In this report, the Global Hospital Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Hospital Market, By Ownership:

Public

Private

Hospital Market, By Type:

General

Specialty

Multi- Specialty

Hospital Market, By Type of Services:

In-Patient Services



Out-Patient Services

Hospital Market, By Bed Capacity:

Up to 100 beds

100-500 beds

Above 500 beds

Hospital Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Hospital Market.

## Available Customizations:

Global Hospital market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validations
- 2.7. Assumptions and Limitations

### **3. EXECUTIVE SUMMARY**

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### **4. VOICE OF CUSTOMER**

### **5. GLOBAL HOSPITAL MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Ownership (Public v/s Private)
  - 5.2.2. By Type (General, Specialty, Multi- Specialty)
  - 5.2.3. By Type of Services (In-Patient Services v/s Out-Patient Services)
  - 5.2.4. By Bed Capacity (Up to 100 beds, 100-500 beds, Above 500 beds)

- 5.2.5. By Region
- 5.2.6. By Company (2022)
- 5.3. Market Map

## **6. NORTH AMERICA HOSPITAL MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Ownership
  - 6.2.2. By Type
  - 6.2.3. By Type of Services
  - 6.2.4. By Bed Capacity
  - 6.2.5. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States Hospital Market Outlook
    - 6.3.1.1. Market Size & Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share & Forecast
      - 6.3.1.2.1. By Ownership
      - 6.3.1.2.2. By Type
      - 6.3.1.2.3. By Type of Services
      - 6.3.1.2.4. By Bed Capacity
  - 6.3.2. Canada Hospital Market Outlook
    - 6.3.2.1. Market Size & Forecast
      - 6.3.2.1.1. By Value
    - 6.3.2.2. Market Share & Forecast
      - 6.3.2.2.1. By Ownership
      - 6.3.2.2.2. By Type
      - 6.3.2.2.3. By Type of Services
      - 6.3.2.2.4. By Bed Capacity
  - 6.3.3. Mexico Hospital Market Outlook
    - 6.3.3.1. Market Size & Forecast
      - 6.3.3.1.1. By Value
    - 6.3.3.2. Market Share & Forecast
      - 6.3.3.2.1. By Ownership
      - 6.3.3.2.2. By Type
      - 6.3.3.2.3. By Type of Services
      - 6.3.3.2.4. By Bed Capacity

## 7. EUROPE HOSPITAL MARKET OUTLOOK

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Ownership

#### 7.2.2. By Type

#### 7.2.3. By Type of Services

#### 7.2.4. By Bed Capacity

#### 7.2.5. By Country

### 7.3. Europe: Country Analysis

#### 7.3.1. Germany Hospital Market Outlook

##### 7.3.1.1. Market Size & Forecast

###### 7.3.1.1.1. By Value

##### 7.3.1.2. Market Share & Forecast

###### 7.3.1.2.1. By Ownership

###### 7.3.1.2.2. By Type

###### 7.3.1.2.3. By Type of Services

###### 7.3.1.2.4. By Bed Capacity

#### 7.3.2. United Kingdom Hospital Market Outlook

##### 7.3.2.1. Market Size & Forecast

###### 7.3.2.1.1. By Value

##### 7.3.2.2. Market Share & Forecast

###### 7.3.2.2.1. By Ownership

###### 7.3.2.2.2. By Type

###### 7.3.2.2.3. By Type of Services

###### 7.3.2.2.4. By Bed Capacity

#### 7.3.3. Italy Hospital Market Outlook

##### 7.3.3.1. Market Size & Forecast

###### 7.3.3.1.1. By Value

##### 7.3.3.2. Market Share & Forecast

###### 7.3.3.2.1. By Ownership

###### 7.3.3.2.2. By Type

###### 7.3.3.2.3. By Type of Services

###### 7.3.3.2.4. By Bed Capacity

#### 7.3.4. France Hospital Market Outlook

##### 7.3.4.1. Market Size & Forecast

###### 7.3.4.1.1. By Value

- 7.3.4.2. Market Share & Forecast
  - 7.3.4.2.1. By Ownership
  - 7.3.4.2.2. By Type
  - 7.3.4.2.3. By Type of Services
  - 7.3.4.2.4. By Bed Capacity
- 7.3.5. Spain Hospital Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Ownership
    - 7.3.5.2.2. By Type
    - 7.3.5.2.3. By Type of Services
    - 7.3.5.2.4. By Bed Capacity

## **8. ASIA-PACIFIC HOSPITAL MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast
  - 8.2.1. By Ownership
  - 8.2.2. By Type
  - 8.2.3. By Type of Services
  - 8.2.4. By Bed Capacity
  - 8.2.5. By Country
- 8.3. Asia-Pacific: Country Analysis
  - 8.3.1. China Hospital Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Ownership
      - 8.3.1.2.2. By Type
      - 8.3.1.2.3. By Type of Services
      - 8.3.1.2.4. By Bed Capacity
  - 8.3.2. India Hospital Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Ownership
      - 8.3.2.2.2. By Type

- 8.3.2.2.3. By Type of Services
- 8.3.2.2.4. By Bed Capacity
- 8.3.3. Japan Hospital Market Outlook
  - 8.3.3.1. Market Size & Forecast
    - 8.3.3.1.1. By Value
  - 8.3.3.2. Market Share & Forecast
    - 8.3.3.2.1. By Ownership
    - 8.3.3.2.2. By Type
    - 8.3.3.2.3. By Type of Services
    - 8.3.3.2.4. By Bed Capacity
- 8.3.4. South Korea Hospital Market Outlook
  - 8.3.4.1. Market Size & Forecast
    - 8.3.4.1.1. By Value
  - 8.3.4.2. Market Share & Forecast
    - 8.3.4.2.1. By Ownership
    - 8.3.4.2.2. By Type
    - 8.3.4.2.3. By Type of Services
    - 8.3.4.2.4. By Bed Capacity
- 8.3.5. Australia Hospital Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Ownership
    - 8.3.5.2.2. By Type
    - 8.3.5.2.3. By Type of Services
    - 8.3.5.2.4. By Bed Capacity

## **9. SOUTH AMERICA HOSPITAL MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Ownership
  - 9.2.2. By Type
  - 9.2.3. By Type of Services
  - 9.2.4. By Bed Capacity
  - 9.2.5. By Country
- 9.3. South America: Country Analysis
  - 9.3.1. Brazil Hospital Market Outlook



- 9.3.1.1. Market Size & Forecast
  - 9.3.1.1.1. By Value
- 9.3.1.2. Market Share & Forecast
  - 9.3.1.2.1. By Ownership
  - 9.3.1.2.2. By Type
  - 9.3.1.2.3. By Type of Services
  - 9.3.1.2.4. By Bed Capacity
- 9.3.2. Argentina Hospital Market Outlook
  - 9.3.2.1. Market Size & Forecast
    - 9.3.2.1.1. By Value
  - 9.3.2.2. Market Share & Forecast
    - 9.3.2.2.1. By Ownership
    - 9.3.2.2.2. By Type
    - 9.3.2.2.3. By Type of Services
    - 9.3.2.2.4. By Bed Capacity
- 9.3.3. Colombia Hospital Market Outlook
  - 9.3.3.1. Market Size & Forecast
    - 9.3.3.1.1. By Value
  - 9.3.3.2. Market Share & Forecast
    - 9.3.3.2.1. By Ownership
    - 9.3.3.2.2. By Type
    - 9.3.3.2.3. By Type of Services
    - 9.3.3.2.4. By Bed Capacity
    - 9.3.3.2.5.

## **10. MIDDLE EAST AND AFRICA HOSPITAL MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Ownership
  - 10.2.2. By Type
  - 10.2.3. By Type of Services
  - 10.2.4. By Bed Capacity
  - 10.2.5. By Country
- 10.3. MEA: Country Analysis
  - 10.3.1. South Africa Hospital Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value

- 10.3.1.2. Market Share & Forecast
  - 10.3.1.2.1. By Ownership
  - 10.3.1.2.2. By Type
  - 10.3.1.2.3. By Type of Services
  - 10.3.1.2.4. By Bed Capacity
- 10.3.2. Saudi Arabia Hospital Market Outlook
  - 10.3.2.1. Market Size & Forecast
    - 10.3.2.1.1. By Value
  - 10.3.2.2. Market Share & Forecast
    - 10.3.2.2.1. By Ownership
    - 10.3.2.2.2. By Type
    - 10.3.2.2.3. By Type of Services
    - 10.3.2.2.4. By Bed Capacity
- 10.3.3. UAE Hospital Market Outlook
  - 10.3.3.1. Market Size & Forecast
    - 10.3.3.1.1. By Value
  - 10.3.3.2. Market Share & Forecast
    - 10.3.3.2.1. By Ownership
    - 10.3.3.2.2. By Type
    - 10.3.3.2.3. By Type of Services
    - 10.3.3.2.4. By Bed Capacity

## **11. MARKET DYNAMICS**

- 11.1. Drivers
- 11.2. Challenges

## **12. MARKET TRENDS & DEVELOPMENTS**

- 12.1. Recent Development
- 12.2. Mergers & Acquisitions
- 12.3. Product Launches

## **13. GLOBAL HOSPITAL MARKET: SWOT ANALYSIS**

## **14. PORTER'S FIVE FORCES ANALYSIS**

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants

- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Products

## **15. COMPETITIVE LANDSCAPE**

- 15.1. Business Overview
- 15.2. Service Offerings
- 15.3. Recent Developments
- 15.4. Key Personnel
- 15.5. SWOT Analysis
  - 15.5.1. Ramsay Health Care Limited
  - 15.5.2. Community Health Systems, Inc.
  - 15.5.3. Spire Healthcare Group plc
  - 15.5.4. Tenet Healthcare Corporation
  - 15.5.5. Universal Health Services, Inc.
  - 15.5.6. IHH Healthcare Berhad
  - 15.5.7. Apollo Hospitals Enterprise Limited
  - 15.5.8. HCA Healthcare, Inc.
  - 15.5.9. Fresenius SE & Co. KGaA
  - 15.5.10. ORPEA Group

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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