

# **India Ambulatory Surgical Centers Market By Type (Hospital-Based Ambulatory Surgical Centers, Free-Standing Ambulatory Surgical Centres), By Application (Orthopedics, Plastic Surgery, Ophthalmology, Gastroenterology, Neurology, Others), By Ownership (Physician Only, Hospital Only, Corporation Only, Physician & Hospital, Physician & Corporation, Hospital & Corporation), By Specialty Type (Single, Multispecialty), By Region, By Competition, Forecast and Opportunities, 2020-2030F**

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## **Abstracts**

India Ambulatory Surgical Centers Market was valued at USD 274.42 Million in 2024 and is anticipated to reach USD 393.08 Million by 2030, with a CAGR of 6.25% during 2025-2030. The Ambulatory Surgical Centers Market refers to the thriving business sector comprising of specialized healthcare facilities known as ambulatory surgery centers (ASCs), also commonly referred to as outpatient surgery centers. These centers are exclusively dedicated to providing a wide range of surgical procedures, including preventive interventions, that do not necessitate an overnight hospital stay. The market encompasses a comprehensive spectrum of operations, spanning from the initial setup, efficient management, and sustainable growth of these centers. Key aspects encompassed within this sector include the meticulous establishment of state-of-the-art facilities, strategic acquisition of cutting-edge medical equipment, recruitment of highly skilled and specialized medical staff, and unwavering adherence to stringent healthcare regulations. The market trends within this domain are significantly influenced by a multitude of factors, encompassing groundbreaking medical advancements, dynamic

health insurance policies, and evolving patient preferences. The continuous evolution of these factors shapes the landscape of the Ambulatory Surgical Centers Market, paving the way for enhanced patient care, improved accessibility, and heightened convenience in the realm of outpatient surgical services.

## Key Market Drivers

### Growing Burden of Chronic Diseases and Surgeries

The burgeoning burden of chronic diseases, including diabetes, heart disease, and cancer, coupled with the increasing need for surgeries in India, has led to a significant rise in the growth of Ambulatory Surgical Centers (ASCs). These specialized centers cater to the rising demand for specialized care and surgical interventions, providing a cost-effective and efficient alternative to hospital-based procedures. Approximately 21% of the elderly population in India are reported to have at least one chronic disease, with notable disparities between rural and urban areas. In rural regions, 17% of elderly individuals are affected, compared to 29% in urban areas. Chronic conditions such as hypertension and diabetes dominate, accounting for approximately 68% of all reported cases.

ASCs prioritize outpatient surgical services, offering state-of-the-art facilities and leveraging the latest technologies to deliver high-quality care. With their focus on minimally invasive procedures, ASCs not only facilitate quicker recovery but also reduce the likelihood of hospital readmissions. This becomes especially crucial given the preference for less invasive treatments and the growing elderly population. In line with the Indian government's commitment to improving healthcare infrastructure and increasing accessibility, the establishment of more ASCs is inevitable. This trend is expected to continue, with the ASC market in India poised for substantial growth in the coming years, fueled by the escalating need for comprehensive medical and surgical care.

The growth of ASCs provides a promising outlook for healthcare in India, addressing the challenges posed by chronic diseases and the increasing demand for surgeries. With their ability to provide specialized care, cost-effectiveness, and advanced technologies, ASCs play a vital role in ensuring accessible and high-quality healthcare for all.

### Rising Preference Towards Ambulatory Surgery Centers

In India, there has been a tremendous surge in the preference for Ambulatory Surgical

Centers (ASCs) due to their remarkable efficiency, unmatched convenience, and exceptional cost-effectiveness. With the ever-increasing population and the subsequent rise in the demand for healthcare services, the need for swift and efficient delivery of medical care has become paramount. ASCs, which offer same-day surgical care encompassing diagnostic and preventive procedures, have emerged as an ideal solution to address these challenges. They represent a transformative shift towards a patient-centric approach, significantly reducing hospital stays and allowing patients to recuperate in the comforting confines of their own homes. This is particularly significant in India, where overcrowded hospitals often result in compromised care and hinder the patient experience. Nova Medical Centre is currently the sole Ambulatory Surgery Center (ASC) network operating in India. The company has ambitious plans to establish 100 centers across the country within the next four years, supported by an investment exceeding ₹900 crore. Nova intends to collaborate with leading physicians in various regions through strategic partnership agreements. Under this model, approximately 30% ownership of each center will be allocated to 35–40 doctors practicing at the facility, while the remaining investment will be provided by GTI LLC, a US-based venture capital firm. Participating physicians will earn surgeon fees in addition to 30% of the profits at the EBITDA level. In its initial phase, the company aims to establish 25 centers in major Indian cities, laying the foundation for its broader expansion strategy.

ASCs exhibit a more cost-effective model due to their lower overhead costs compared to traditional hospitals, making high-quality healthcare more accessible to wider sections of the population. The rise in chronic diseases and the growing demand for surgeries such as cataract, orthopedic, and endoscopic procedures also contribute to the exponential growth of ASCs in India. In the backdrop of the ongoing COVID-19 pandemic, these centers provide safer alternatives for non-emergency surgeries, alleviating the burden on hospitals and reducing the risk of infection transmission. Taken together, these factors, along with the increasing recognition of the numerous benefits ASCs bring, have led to a significant rise in preference and subsequent growth of Ambulatory Surgical Centers in India.

### Growing Patient Preference for Minimally Invasive Surgeries

The rise in patient preference for minimally invasive surgeries (MIS) is significantly contributing to the growth of Ambulatory Surgical Centers (ASCs) in India. These centers provide a patient-friendly environment suitable for MIS that involve small incisions, quicker recovery times, less post-operative discomfort, and often, lower costs. As the Indian population becomes more health-conscious and informed, there is a growing demand for high-quality healthcare that is both effective and less physically

taxing. This trend is fueling the expansion of ASCs, as they are well-equipped to meet these needs with their specialized infrastructure and skilled personnel. By offering MIS, these centers can increase patient turnover, thereby boosting their operational efficiency and profitability.

The surge in health insurance penetration and government initiatives promoting affordable healthcare further enhance the appeal of ASCs for MIS. Patients are increasingly seeking out ASCs as a cost-effective alternative to traditional hospital settings, where they can receive the same level of care in a more streamlined and convenient manner. The cumulative effect of these factors is creating a favorable landscape for the growth of ASCs in India, making them an integral part of the country's evolving healthcare ecosystem. With advancements in technology and increasing awareness of the benefits of MIS, ASCs are poised to play a crucial role in providing accessible and efficient healthcare services to the Indian population.

### Advancements in Medical Technology

Advancements in medical technology are playing a pivotal role in the exponential growth of Ambulatory Surgical Centers (ASCs) in India. This remarkable progress can be primarily attributed to the continuous development of minimally invasive surgical techniques and the constant improvement of diagnostic tools. Minimally invasive procedures have revolutionized the field of surgery by offering numerous benefits, including smaller incisions, reduced hospital stays, and a quicker return to normal activities for patients. These advancements have made ASCs increasingly appealing to individuals seeking high-quality healthcare with enhanced expediency and cost-effectiveness. ASCs are actively adopting advanced diagnostic tools such as robotic systems and AI-powered imaging equipment. These cutting-edge technologies further enhance the accuracy of diagnosis and treatment, ultimately leading to improved patient outcomes. The integration of telemedicine in ASCs has revolutionized post-operative care, providing patients with the convenience of remote follow-ups, eliminating the need for unnecessary travel.

The remarkable growth of ASCs in India is bolstered by the favorable healthcare infrastructure policies implemented by the Indian government. These policies, combined with the rapid adoption of advanced technologies, are driving unprecedented accessibility to healthcare for a larger population. Overall, the synergistic effect of innovative medical technologies, favorable policies, and patient-centric approaches is transforming the healthcare landscape in India, making it more accessible and efficient for all.

## Key Market Challenges

### Regulatory Concerns Regarding Outpatient Care

In India, Ambulatory Surgical Centers (ASCs) show promise as an efficient and cost-effective healthcare delivery model, particularly for minor surgeries and procedures. These centers provide convenience and shorter recovery times for patients, reducing the burden on traditional hospital settings. However, their growth is hindered by certain regulatory concerns surrounding outpatient care. While stringent safety and quality controls are necessary, they often impose significant financial and operational burdens on ASCs. These centers must invest in advanced equipment, skilled staff, and rigorous protocols to ensure patient safety. However, these investments can make it challenging for ASCs to sustain operations, especially considering the lower reimbursement rates for outpatient procedures.

The absence of a comprehensive accreditation process for ASCs creates uncertainties regarding their credibility and acceptance among the public. Accreditation plays a vital role in assuring patients of the quality and standards maintained by ASCs. Without a well-defined accreditation process, potential patients may hesitate to choose ASCs for their healthcare needs.

The limited insurance coverage for procedures conducted in ASCs compared to extensive inpatient procedures coverage discourages patient preference. This disparity in coverage creates a barrier to the growth of ASCs, as patients may opt for inpatient procedures due to better insurance benefits, despite the suitability of ASCs for their specific needs. Overall, these regulatory issues surrounding outpatient care are decelerating the growth of Ambulatory Surgical Centers in India. Addressing these concerns and establishing clear policies tailored to the unique nature of ASCs can unlock their full potential in revolutionizing healthcare delivery in the country.

### Dearth Of Skilled Professionals

In India, the growth of Ambulatory Surgical Centers (ASCs) is being impeded by the dearth of skilled professionals. ASCs, known for providing same-day surgical care, hinge on the availability of skilled healthcare professionals who are adept at delivering rapid, high-quality care. Yet, the scarcity of such professionals is proving to be a significant bottleneck. This shortage is not just related to the number of healthcare professionals, but also the skillsets required to operate in such environments. The

subtle nuances of ambulatory care demand a mix of skills, including efficient patient management, the ability to handle high patient turnover, and proficiency in minimally invasive surgical procedures. However, such skills are in short supply due to inadequate training infrastructure and a lack of emphasis on specialized healthcare education. This has resulted in a gap between the demand for and supply of skilled professionals in ASCs, which is severely curtailing their growth. To address this issue, it becomes essential to invest in healthcare education and training, with a specific focus on ambulatory care, to cultivate a workforce that is equipped to meet the unique demands of ASCs. Without adequate skilled professionals, the expansion of ASCs will remain stunted, hindering the evolution of India's healthcare sector.

## Key Market Trends

### Increased Focus on Outpatient Care

The mounting focus on outpatient care in India is significantly contributing to the growth of Ambulatory Surgical Centers (ASCs). This shift is propelled by the push towards reducing healthcare costs while still providing high-quality patient care. ASCs offer a more cost-effective solution compared to traditional inpatient hospital care, making them a preferred choice for many patients. One of the key advantages of ASCs is efficient patient management. With a streamlined process and dedicated facilities, ASCs allow for shorter wait times, ensuring that patients can receive the care they need in a timely manner. The lower operational costs of ASCs translate into more affordable healthcare services, making surgeries and treatments more accessible to a larger population.

Advancements in medical technology and improved anesthesia techniques have also played a significant role in the growth of ASCs. These advancements have expanded the range of procedures that can be performed in ASCs, allowing for a wider array of treatments and surgeries. The adoption of minimally invasive techniques has further enhanced the appeal of ASCs. These techniques not only enable quicker recovery but also reduce the need for prolonged hospital stays, improving the overall patient experience. The increased emphasis on outpatient care is transforming the healthcare landscape in India. ASCs are spearheading this transformation by providing cost-effective, efficient, and accessible healthcare services. As the demand for outpatient care continues to rise, ASCs are poised to play an even more significant role in shaping the future of healthcare in India.

### Rising Healthcare Expenditure

The surge in healthcare expenditure in India has significantly propelled the growth of Ambulatory Surgical Centers (ASCs). This upward trajectory is largely due to the escalating costs of hospital-based outpatient care, which have become increasingly burdensome for patients. In contrast, ASCs offer a cost-effective alternative for minor and non-emergency surgical procedures, thus making them an attractive option for individuals seeking affordable healthcare solutions. ASCs are equipped with state-of-the-art technology, ensuring the delivery of high-quality healthcare services that are comparable to those provided by hospital outpatient departments. This advanced technology not only enhances patient care but also contributes to improved patient outcomes. With the increasing number of patients opting for ASCs, the demand for these centers has surged, and the ASC market in India is witnessing remarkable growth. The Indian healthcare system is currently witnessing a shift towards value-based care, which aims to maximize patient outcomes against expenses. This change in approach is further driving the growth of ASCs, as they can provide cost-efficient, quality care that aligns with the principles of value-based healthcare. The growing prevalence of chronic diseases, the aging population, and advancements in minimally invasive surgeries are additional factors contributing to the rising healthcare expenditure in this sector.

Despite the challenges faced by ASCs, such as stringent regulatory frameworks and high establishment costs, their growth in India is expected to continue, fueled by the climbing healthcare expenditure and the need for accessible and affordable healthcare services. The ASC market in India is thus poised for substantial growth, driven by evolving consumer preferences and the changing dynamics of healthcare spending patterns. The growth of Ambulatory Surgical Centers in India is driven by the increasing healthcare expenditure, the shift towards value-based care, and the rising demand for cost-efficient and quality healthcare services. With their advanced technology and focus on patient outcomes, ASCs are playing a crucial role in meeting the evolving healthcare needs of the Indian population.

## Segmental Insights

### Type Insights

Based on the type, in the Indian Ambulatory Surgical Centers market, Hospital-Based Ambulatory Surgical Centers segment is anticipated to dominate in the forecast period. This is largely due to the extensive infrastructure, comprehensive range of services, and significant patient trust associated with hospital-based entities. These centers often have more advanced resources and a larger staff, making them well-equipped to handle

a wide array of surgical procedures. With state-of-the-art equipment, specialized departments, and a dedicated team of medical professionals, these hospital-based centers prioritize patient safety and provide a seamless experience throughout the surgical journey. The availability of specialized units, such as intensive care and emergency departments, further enhances their capabilities in managing complex cases and potential complications. Overall, the dominance of Hospital-Based Ambulatory Surgical Centers in the Indian market is a testament to their commitment to delivering high-quality care and ensuring optimal patient outcomes.

### Application Insights

Based on application, in the India Ambulatory Surgical Centers Market, the Orthopedics segment is projected to dominate in the forecast period. This can be attributed to the escalating prevalence of orthopedic disorders, such as arthritis and osteoporosis, heightened by aging demographics, sedentary lifestyles, increased awareness of musculoskeletal health, and the detrimental impact of inadequate physical activity. The rising incidence of sports-related injuries, including torn ligaments and fractures, and the growing demand for joint replacement surgeries due to age-related degeneration further contribute to the prominence of this segment. Advancements in minimally invasive surgical procedures, such as arthroscopy, which enable precise diagnosis and targeted treatment, and the increasing efficacy of outpatient orthopedic surgeries are expected to further propel this segment's growth. These developments not only provide patients with less invasive treatment options, resulting in reduced post-operative pain and faster recovery, but also offer healthcare providers a more efficient and cost-effective approach to orthopedic care, ultimately benefiting the overall healthcare system and improving patient outcomes.

### Regional Insights

The Western region of India is poised to dominate the India Ambulatory Surgical Centers Market. This can be attributed to the significant concentration of state-of-the-art healthcare facilities, advanced infrastructure, and the growing preference for minimally invasive surgical procedures in this region. The Western region benefits from its geographical advantage. Its proximity to major cities and transportation hubs ensures easy accessibility for patients seeking ambulatory surgical services. This, combined with the region's well-developed healthcare ecosystem and the availability of specialized surgical expertise, positions the Western region as a frontrunner in providing high-quality and accessible ambulatory surgical care.

With a strong foundation in healthcare, the Western region is well-positioned to drive innovation and lead the way in revolutionizing ambulatory surgical services in India. The continuous efforts towards research and development, coupled with collaborations between medical institutions and industry players, further contribute to the region's potential for growth and advancement in the market. The Western region of India stands as a beacon of excellence in the India Ambulatory Surgical Centers Market, offering comprehensive and top-notch ambulatory surgical services to patients across the country.

### Key Market Players

Fortis Healthcare Ltd

Apollo Health & Lifestyle Limited

Care Hospitals Private Limited

Max Healthcare Institute Limited

Vasan Healthcare Private Ltd

Columbia Asia Hospitals Pvt. Ltd.

Nova Medical Centre

SCA Health (India)

### Report Scope:

In this report, the India Ambulatory Surgical Centers Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Ambulatory Surgical Centers Market, By Type:

Hospital-Based Ambulatory Surgical Centers

Free-Standing Ambulatory Surgical Centres

### India Ambulatory Surgical Centers Market, By Application:

Orthopedics

Plastic Surgery

Ophthalmology

Gastroenterology

Neurology

Others

### India Ambulatory Surgical Centers Market, By Ownership:

Physician Only

Hospital Only

Corporation Only

Physician & Hospital

Physician & Corporation

Hospital & Corporation

### India Ambulatory Surgical Centers Market, By Specialty Type:

Single

Multispecialty

### India Ambulatory Surgical Centers Market, By Region:

North

South

West

East

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Ambulatory Surgical Centers Market.

## Available Customizations:

India Ambulatory Surgical Centers Market report with the given market data, TechSci 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).

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