India Hospital Market, By Ownership (Public, Private, PPP), By Type (General, Multi- Speciality Hospitals, Specialty), By Bed Capacity (Up to 100 beds, 101-300beds, 301-700 Beds, Above 700 Beds), By Regionality (Regional/District, Rural, Others), By Type of Services (In-patient Services v/s Out-patient Services), By Region, Competition Forecast & Opportunities, FY2027

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Abstracts

India hospital market stood at USD66.77 billion in FY2021 and is expected to grow at a steady CAGR of 8.32% during the forecast period. The India hospital market is driven by the growing prevalence of various chronic and infectious diseases. This has in turn increased the patient pool requiring diagnosis and treatment and the demand for hospitals in the country. According to the first Longitudinal Ageing Study in India (LASI) released by the Union Ministry of Family and Health Welfare in January 2020, two in every three citizens in India suffer from some chronic disease. Besides, the growing penetration of health insurance plans is expected to positively influence the growth of the India hospital market. Additionally, an increase in coverage towards various diseases and injuries in different health insurance plans is also expected to drive the market growth. Furthermore, growing awareness towards the adoption of health insurance plans, emergence of various health insurance provider companies, among others are expected to create lucrative opportunities for the growth of the India hospital market. Furthermore, supportive government policies such as increase in FDI limit from 49% to 74% in Union Budget 2021 coupled with announcement of USD413.13 million funds infusion by the finance ministry of India into state-owned general insurance companies to improve the overall status of these companies is further expected to

create lucrative opportunities for the market growth over the next few years.

The India hospital market is segmented based on ownership, type, bed capacity, regionality, type of services, region, and company. Based on ownership, the market can be categorized into private, public and public-private-partnership (PPP). The private ownership segment dominated the market in FY2021 with a share of around 54.84% and will continue to dominate the market during the forecast period as well. This can be ascribed to the growing privatization across the healthcare industry and emergence of large private hospital chains in the country. Also, the growing popularity among the population to avail treatment at private hospitals is further projected to fuel the market growth. While the PPP model can also witness growth in the coming years on account of the supportive government policy of NITI Aayog to link new and/or existing Private Medical Colleges with functional District Hospitals through PPP.

Based on type, the India hospital market can be categorized into general, multi-specialty and specialty. The multi-specialty hospital type is expected to witness significant growth during the forecast period owing to the increasing penetration of multi-specialty hospital chains. Additionally, the patients prefer multi-specialty hospitals on account of availability of various diagnostic and treatment facilities under a single roof, especially in the urban parts of the country. Besides, multi-specialty hospitals are equipped with advanced diagnostic and treatment options along with the presence of skilled professionals. However, the general hospitals are expected to dominate the market during the forecast period owing to their cost effectiveness and easy availability of hospital beds.

Major players operating in the India hospital market include Apollo Hospitals Enterprise Limited, Max Healthcare Institute Limited, Fortis Healthcare Limited, Narayana Health, Aster DM Healthcare Limited, Shalby Limited, Medanta The Medicity Global Health Pvt Ltd, Tata Memorial Center (TMC), All India Institute of Medical Science (AIIMS), Kokilaben Dhirubhai Ambani Hospital & Medical Research Institute, Sir Ganga Ram Hospital, Lilavati Hospital & Research Centre, and others. The companies are adopting competitive strategies in order to expand their geographic reach and to increase their market share.

Years considered for this report:

Historical Years: FY2017-FY2020

Base Year: FY2021

Estimated Year: FY2022

Forecast Period: FY2023-FY2027

Objective of the Study:

To analyze the historical growth in the market size of India hospital market from FY2017 to FY2020.

To estimate and forecast the market size of India hospital market from FY2021 to FY2027 and growth rate until FY2027.

To classify and forecast India hospital market based on ownership, type, bed capacity, regionality, type of services, region, and company.

To identify dominant region or segment in the India hospital market.

To identify drivers and challenges for India hospital market.

To examine competitive developments such as expansions, new product launches, mergers & acquisitions, etc., in India hospital market.

To identify and analyze the profile of leading players operating in India hospital market.

To identify key sustainable strategies adopted by market players in India hospital market.

TechSci Research performed both primary as well as exhaustive secondary research for this study. Initially, TechSci Research sourced a list of hospitals/clinics across the country. Subsequently, TechSci Research conducted primary research surveys with the identified companies. While interviewing, the respondents were also enquired about their competitors. Through this technique, TechSci Research could include the hospitals/clinics which could not be identified due to the limitations of secondary research. TechSci Research analyzed the hospitals/clinics, end users and presence of all major players across the country.

TechSci Research calculated the market size of India hospital market using a bottom-up approach, wherein data for various end-user segments was recorded and forecast for the future years. TechSci Research sourced these values from the industry experts and company representatives and externally validated through analyzing historical data of these hospital types and applications for getting an appropriate, overall market size. Various secondary sources such as company websites, news articles, press releases, company annual reports, investor presentations and financial reports were also studied by TechSci Research.

Key Target Audience:

- Hospital, clinics, and other stakeholders
- Government bodies such as regulating authorities and policy makers
- Organizations, forums and alliances related to hospital
- Market research and consulting firms

The study is useful in providing answers to several critical questions that are important for the industry stakeholders such as hospitals, clinics, partners, end users, etc., besides allowing them in strategizing investments and capitalizing on market opportunities.

Report Scope:

In this report, India hospital market has been segmented into following categories, in addition to the industry trends which have also been detailed below:

- India Hospital Market, By Ownership:
  - Private
  - Public
  - PPP

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India Hospital Market, By Type:

- General
- Multi- Speciality Hospitals
- Specialty

India Hospital Market, By Bed Capacity:

- Up to 100beds
- 101-300beds
- 301-700 Beds
- Above 700 Beds

India Hospital Market, By Regionality:

- Regional/District
- Rural
- Others

India Hospital Market, By Type of Services:

- In-patient Services
- Out-patient Services

India Hospital Market, By Region:

- North Region
- South Region
- West Region

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East Region

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in India hospital market.

Available Customizations:

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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