



Australian Government
Austrade



INDIA

Healthcare & Medical



Nidhi Bhardwaj
AUSTRADE - South Asia



Indian Health Industry

- **Estimated to be US\$37 Billion market**
- **Growing at 12% per annum**
- **Employs around 9 million people**
- **48,000 clinics & hospitals**
- **1 million beds**
- **500,000 doctors**
- **World's second largest population with very high incidence of disease**



Healthcare in India.....

Market Overview

- Total Size: \$US 56 Billion; approx. 5.5% of India's GDP
- Estimated to reach \$US 60.9 Billion by 2009 & approx. 8% of GDP by 2012
- 0.7 Million Doctors ~ 1 doctor for 235 people
- 1.1 Million hospital beds ~ approx. 1 bed for 1100 people
- 15000 hospitals ~ 1 hospital for 70,000 people
- 1.4 Million Nurses
- 229 Medical Colleges ~ 25,000 new medical graduates each year
- 70% of hospitals & 40% of hospital beds are in the private sector

Growth rate ~ about 12% per annum

- Low per capita healthcare spend (around \$US 49 currently)
- Needs to add approx. 100,000 beds / year over the next 15 years
- Healthcare delivery and pharmaceuticals ~ 75% of the total market
- Overall imports of products / services - about 20%



Healthcare in India...contd.

Increasing demand for Healthcare.....the key drivers

- Increase in life expectancy (approx. 65 years) and an ageing population (approx. 5.6%)
- Growing Middle Class and Patient Preferences
- Unmet demand for healthcare facilities & rapidly changing demographics
- **Low cost of medical care + High success rate + Growing credibility ~ a strong value proposition**
 - Approx. 20 - 30% of the costs in the USA*
- Shift from infectious diseases to Lifestyle-related diseases
Cardiac, Oncology, Stress, Digestive issues, Asthma, and Diabetes ~ 36 % of in-patient revenues
- “Medical Tourism” - attracting customers from outside India (Healthcare Hub)
\$US 333 million as on date; to touch US\$ 2.2 billion by 2012
- Privatization of insurance pushing growth
- Fresh-wave of foreign investments through increasing international alliances
- Increased government spending especially in the semi urban and rural areas
- Strong focus on Tele-medicine and e-Healthcare systems



HEALTH CITIES - Evolving in India

- ✓ Major corporate hospital groups are making significant investments
- ✓ Growing need for improved healthcare infrastructure in Boom Towns & Niche Cities
- ✓ Strong emphasis on Education, Research & Development
- ✓ Approx. 15-20 Health Cities are expected to come up in the next 5 years
- ✓ Offering facilities such as hotels, residential facilities, recreational facilities, golf courses
 - Dr. Naresh Trehan's MediCity – Gurgaon; 1,600 beds
 - Fortis MediCity – Gurgaon; 800 beds
 - Fortis MediCity – Lucknow; 800 beds
 - Apollo Health City – Hyderabad; 700 beds
 - Nagpur Health City – Nagpur; 2,000 beds
 - Chennai Health City - Chennai by Global Group - 1,000 beds
 - Bengal Health City - Durgapur – 50,000 beds
 - Narayana Health City – Bangalore; 5,000 beds
 - MIOT hospitals, Chennai - a multi-specialty medical city
 - Reliance ADAG - 60 acre health city in Kolkata
 - CMCH – Ludhiana; \$US 12.2 million MediCity project in Ludhiana

Source: *The Economic Times, Realty Plus*



Opportunities.....

- **Medical diagnostics equipments**
- **Pathology**
- **Surgical , Hospital supplies**
- **Hospital Accreditation**
- **Nutritional & wellness products**
- **Pharma products**
- **Hospital Management Software**
- **Hospital Infrastructure & Cost Management**
- **Education & Training**
- **Tele medicine**

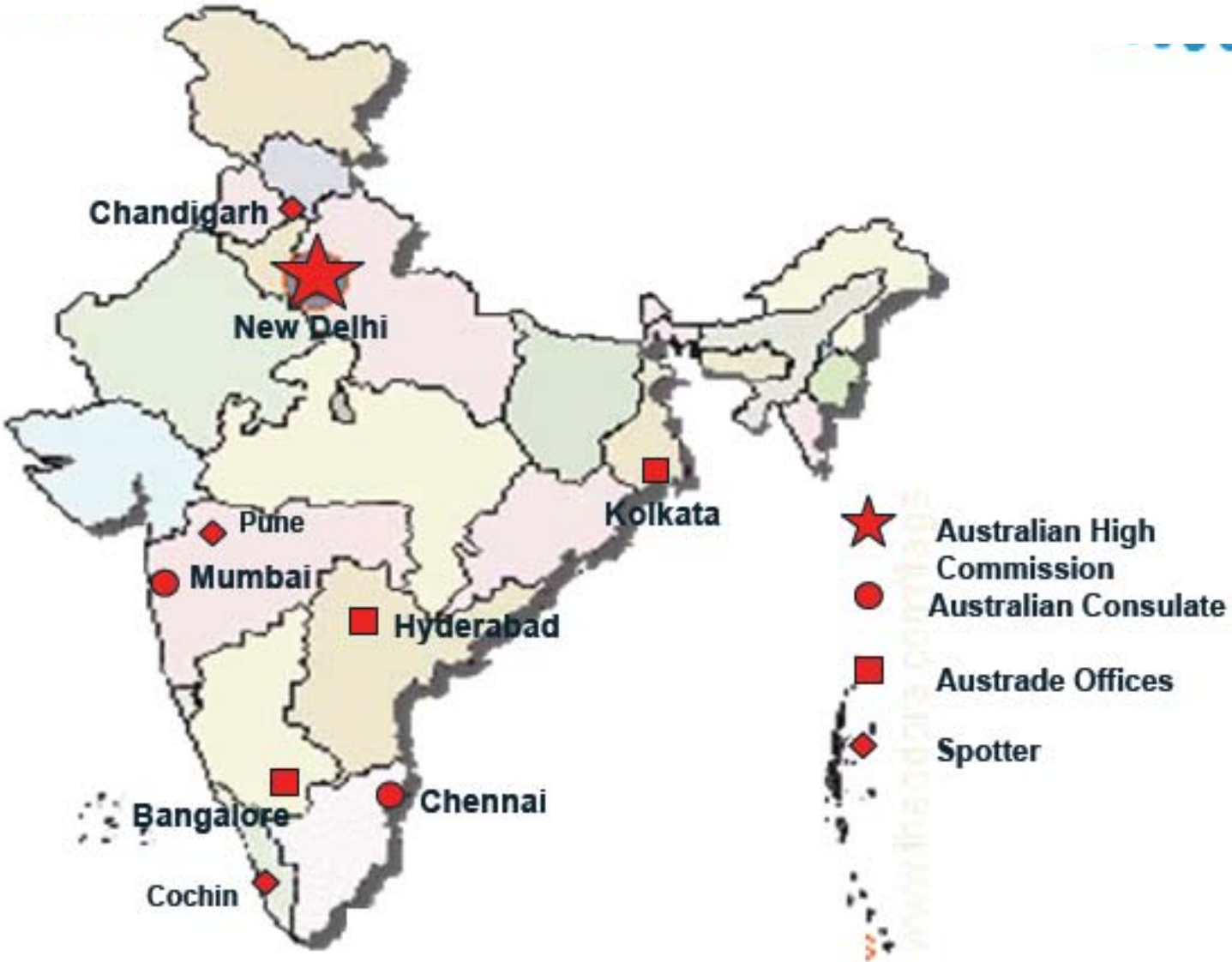


AUSTRADE'S VALUE addition !!!

- Thorough understanding of your needs and the market dynamics
- Provide up-to-date local market KNOWLEDGE & pragmatic INSIGHTS
- Quick access to Industry and Business networks
- Identification and qualification of prospective business partners
- Conduct of Market research + Evaluation and recommendation of appropriate market entry / expansion strategies for your organisation
- Consistent on - ground support and guidance to grow your business through our pan-India presence



Austrade Presence in India



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Thank You

