

INDIA'S HEALTHCARE SCENARIO: ROAD AHEAD

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AGENDA

- Global Healthcare Scenario
- Management of Hospital Services
- Conclusion



GLOBAL HEALTHCARE SCENARIO



A long, empty hospital corridor with a checkered floor and a vaulted ceiling. The corridor is brightly lit by windows on both sides, and the floor reflects the light. The perspective is from the end of the corridor, looking down its length.

10 BIGGEST HOSPITALS IN THE WORLD

pastimers

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THE IMPACT OF SICKNESS ON GLOBAL CITIZENS



- At the current rate it would take more than 130 years to rid the world of hunger.
- Everyday more than 30,000 children around the world die of preventable diseases.



Contd...

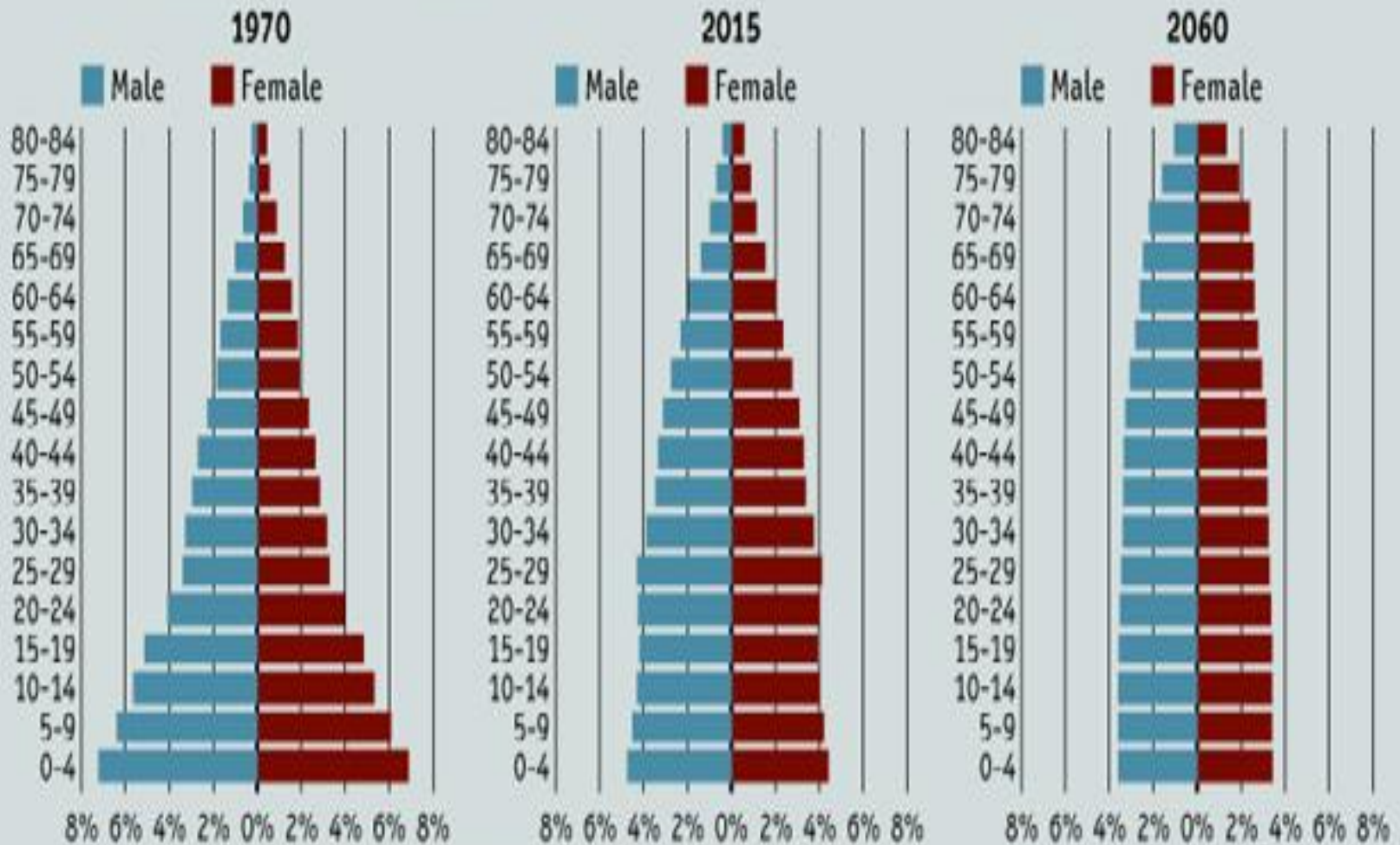
- Every year more than 5,00,000 women die as a result of pregnancy and childbirth.





Population pyramid: A thing of the past?

(Global population, % of total)

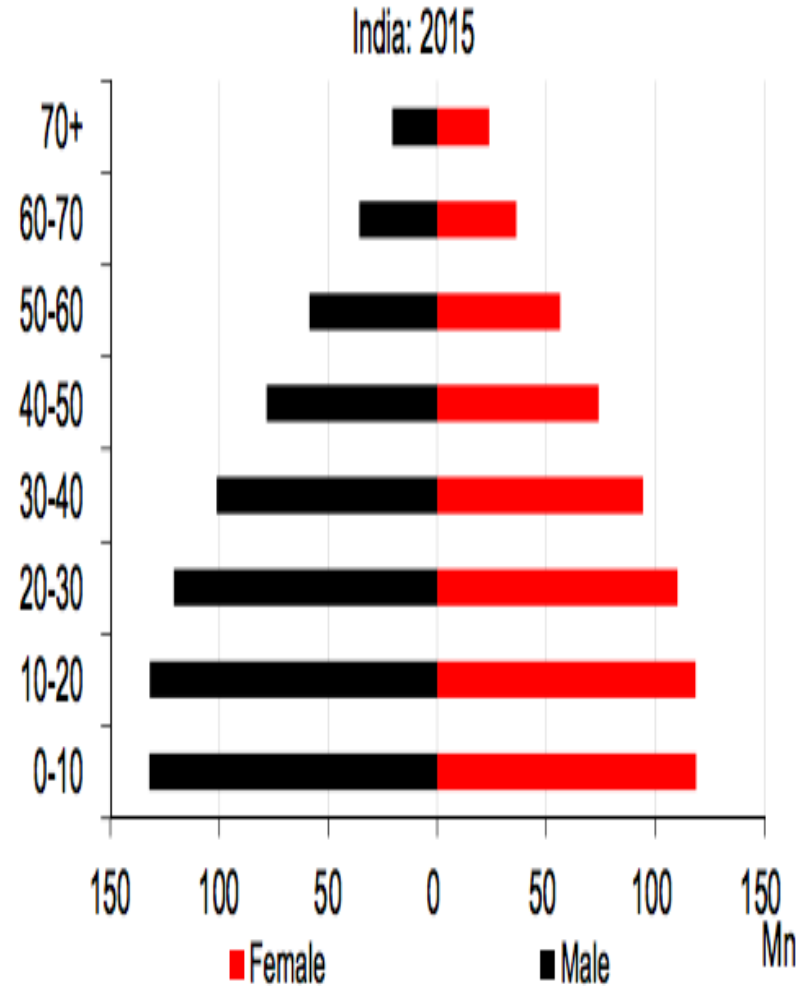


Sources: World Population Prospects: The 2012 Revision, Medium Variant.

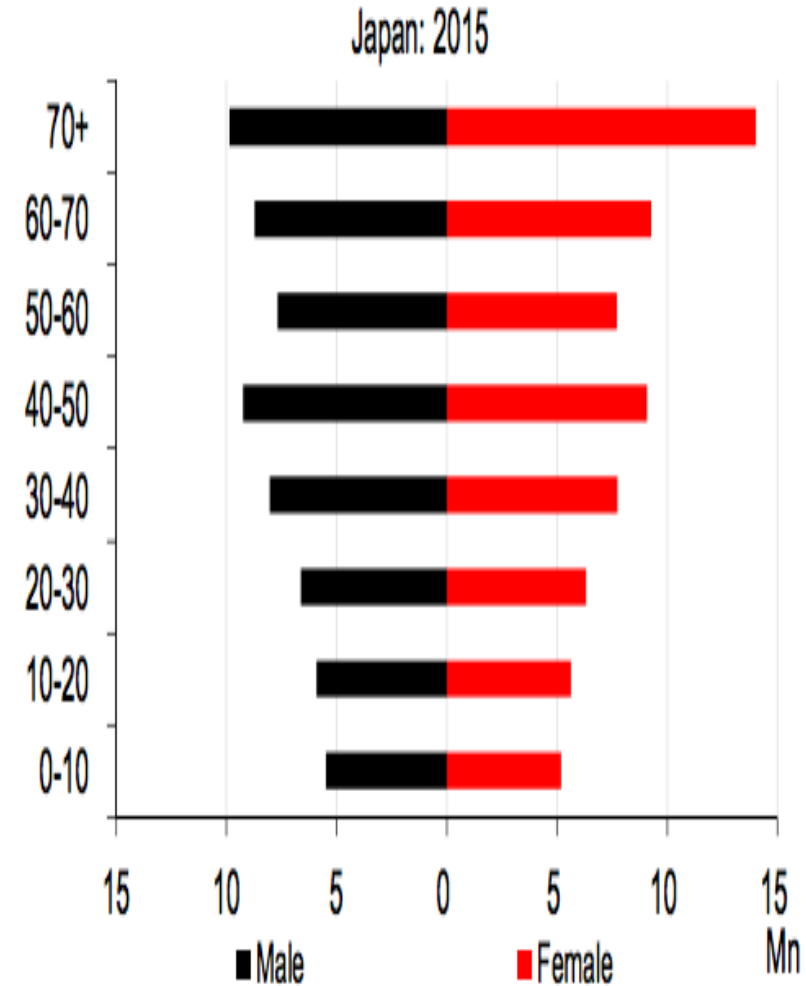


India's population pyramid is very different...

...to Japan's inverted one



Source: HSBC, UN Population Division



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Figure 5

Life Expectancy Forecasts, G-8 And BRIC Countries

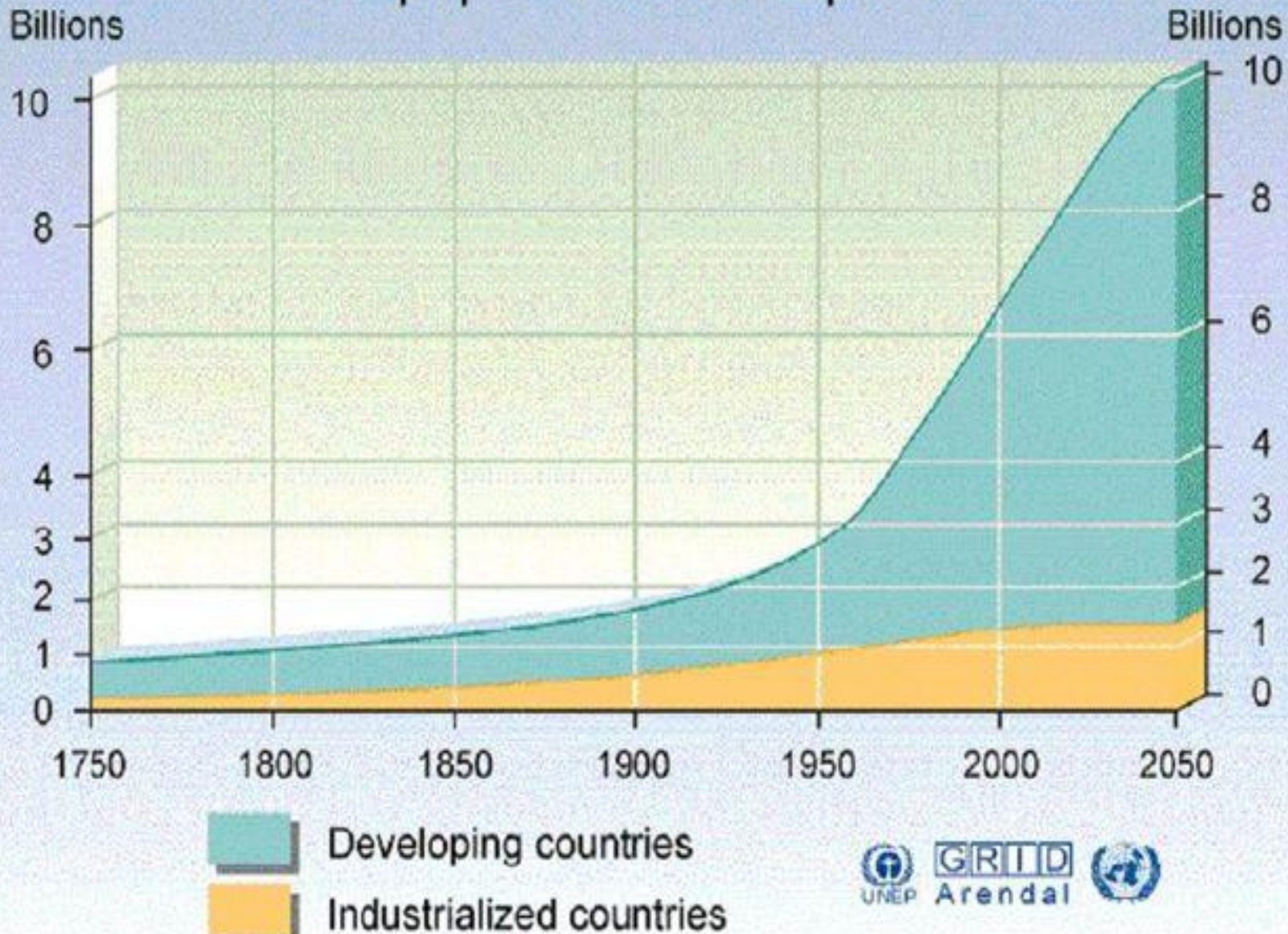
Country	2045-2050	2095-2100
Australia	86.0	91.0
Canada	85.0	90.1
France	85.8	90.8
Germany	84.9	90.0
Italy	85.7	90.6
Japan	87.4	92.3
United Kingdom	84.3	89.4
United States	83.0	88.2
Brazil	79.4	84.0
China	79.1	84.2
India	73.7	79.5
Russian Federation	75.5	81.8

Source: United Nations





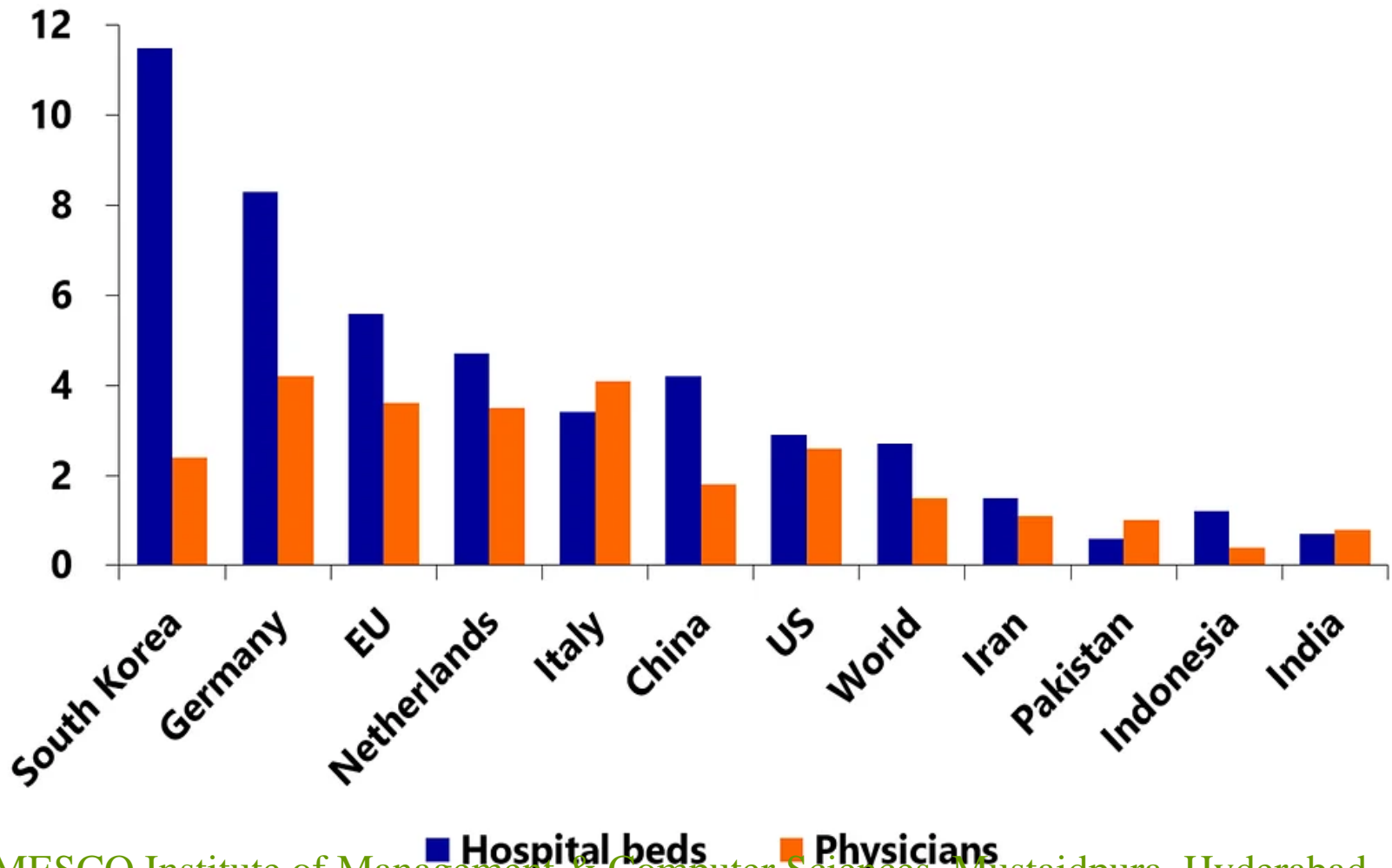
World population development





Healthcare Is Less Abundant In India Compared To Global Average

Per 1000 persons

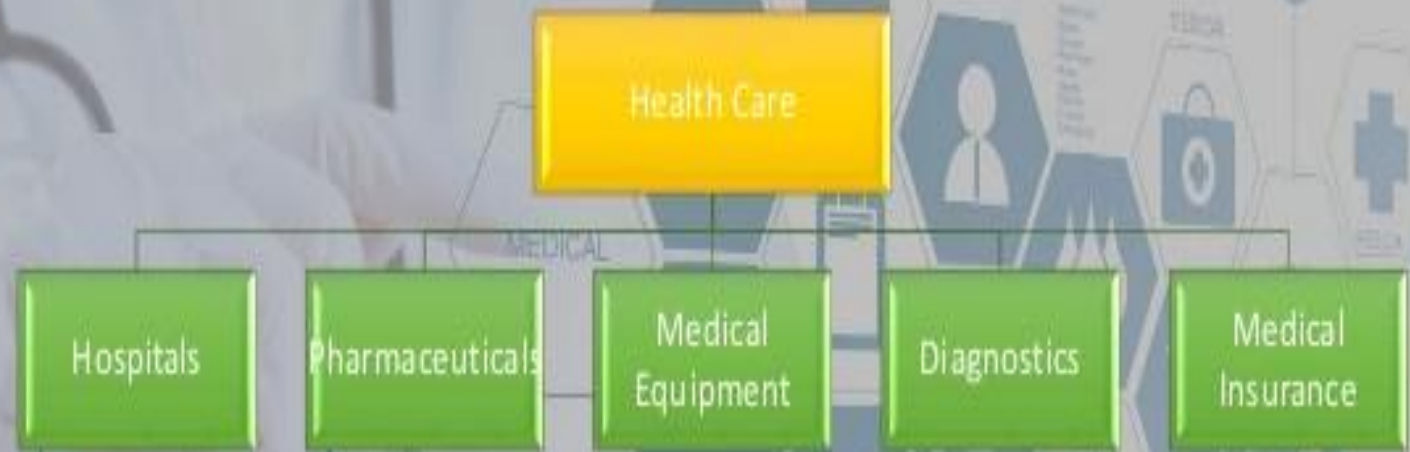


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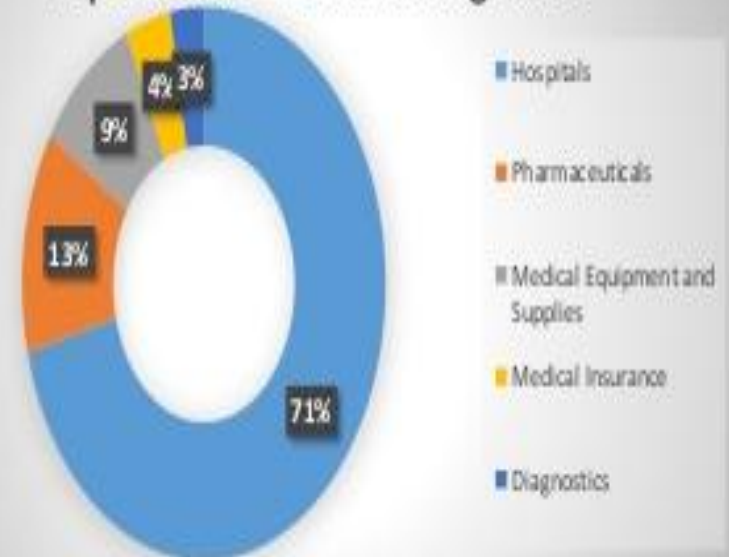
Source: World Bank

Bloomberg | Quint

Segments of HealthCare Industry

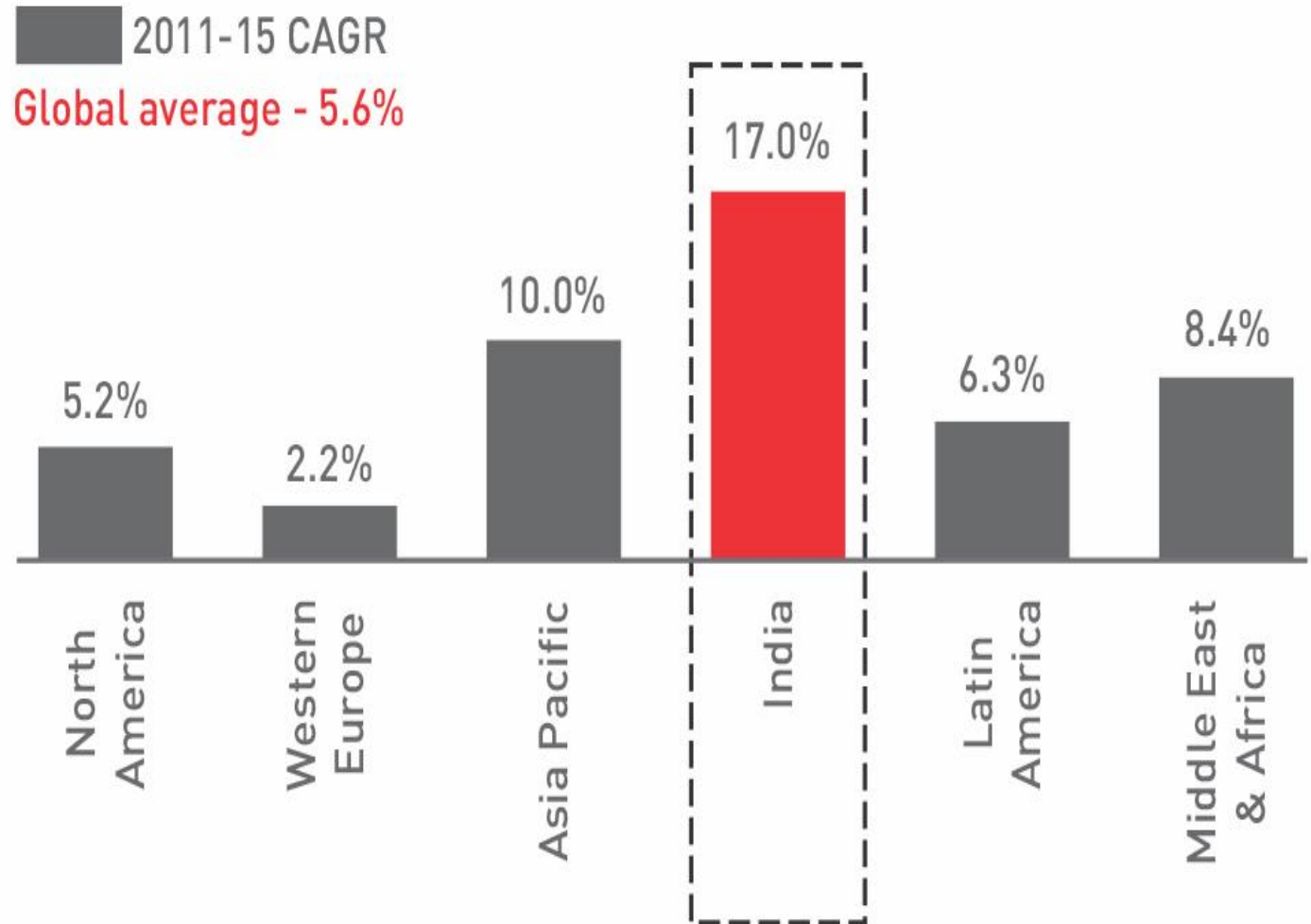


Expenditure on Various Segments





Indian Healthcare is among the fastest growing globally...





2016–17 Best Hospitals Honor Roll

- Mayo Clinic, Rochester, Minn.
- Cleveland Clinic
- Massachusetts General Hospital, Boston
- Johns Hopkins Hospital, Baltimore
- UCLA Medical Center
- New York-Presbyterian University Hospital of Columbia and Cornell
- UCSF Medical Center, San Francisco
- Northwestern Memorial Hospital, Chicago
- Hospitals of the University of Pennsylvania-Penn Presbyterian, Philadelphia
- NYU Langone Medical Center

INDIA'S SHARE IN GLOBAL HEALTH PROBLEMS

- 17% of the population
- 2% of land
- 21% of global burden of disease
- 23% of the child deaths
- 26% of the childhood vaccine preventable deaths
- 20% of the maternal deaths
- 68% of the leprosy cases
- 30% of tuberculosis
- 1% of motor vehicles but bears the burden of 6% of vehicular accidents

HEALTHCARE OF THE CORPORATE HOSPITALS CAN IMPOVERISH!

- “24% OF INDIAN PATIENTS WHO TAKE TREATMENT IN CORPORATE HOSPITALS SLIDE BELOW POVERTY LINE FROM ABOVE POVERTY LINE”- COURTESY CORPORATE HOSPITALS.







-WORLD BANK REPORT-2002





India's Healthcare Challenges

KEY PLAYERS IN THE MARKET

	Company	No of beds*	Presence
	Apollo Hospitals Enterprise Ltd	8,717	Chennai, Madurai, Hyderabad, Karur, Karim Nagar, Mysore, Visakhapatnam, Bilaspur, Aragonda, Kakinada, Bengaluru, Delhi, Noida, Kolkata, Ahmedabad, Mauritius, Pune, Raichur, Ranipet, Ranchi, Ludhiana, Indore, Bhubaneswar, Dhaka
	Aravind Eye Hospitals	3,649	Theni, Tirunelveli, Coimbatore, Puducherry, Madurai, Amethi, Kolkata
	CARE Hospitals	1,912	Hyderabad, Vijayawada, Nagpur, Raipur, Bhubaneswar, Surat, Pune, Visakhapatnam
	Fortis Healthcare Ltd	12,000	Mumbai, Bengaluru, Kolkata, Mohali, Noida, Delhi, Amritsar, Raipur, Jaipur, Chennai, Kota
	Max Hospitals	1,973	Delhi, NCR, Punjab, Uttarakhand
	Manipal Group of Hospitals	4,900	Udupi, Bengaluru, Manipal, Attavar, Mangalore, Goa, Tumkur, Vijaywada, Kasaragod, Visakhapatnam

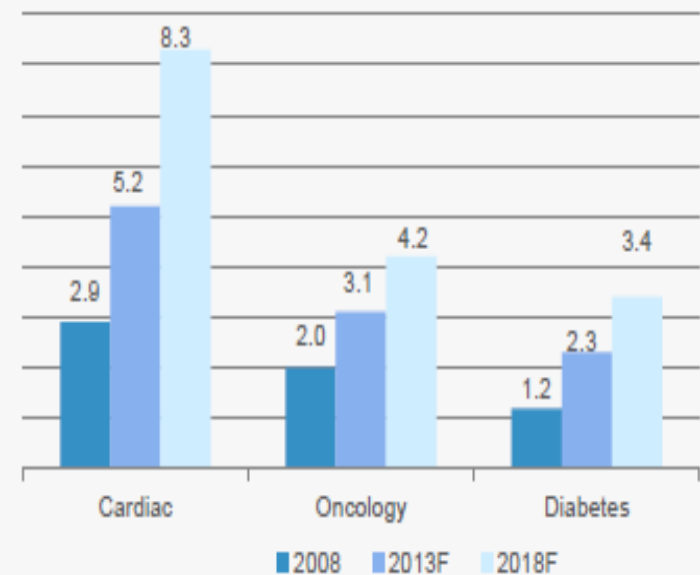
Source: Company websites, Fortis Red Herring Prospectus, Aranca Research

Note: * - No of beds include owned subsidiaries, joint ventures and affiliations

LIFESTYLE DISEASES AND GROWING AWARENESS TO INCREASE HOSPITALISATION

- * Increased incidences of lifestyle diseases such as heart disease, obesity and diabetes have contributed to rising healthcare spending by individuals
 - * Lifestyle diseases are expected to account for 48 per cent of the in-patient revenue in 2013
- * Growing health awareness and precautionary treatments coupled with improved diagnostics are resulting in an increase in hospitalisation
- * CAGR of hospitalised cases from 2008 – 18:
 - * Cardiac – 18 per cent
 - * Oncology – 16 per cent
 - * Diabetes – 19 per cent

Number of hospitalised cases (million)



Source: Apollo Investor Presentation August 2013, Aranca Research
Note: F - Forecast

THE EXPECTED CONTRIBUTION OF HOSPITAL ADMINISTRATORS

Issues and Challenges of Healthcare system:

- Poor service quality in Government hospitals
- Low utilization of private hospitals
- Unaffordable services of the private and corporate groups

The role cut for a Hospital Administrator is:

- Improvement of Quality of Service in government hospitals
- Increase the bed- occupancy ratio of the corporate hospitals
- Making the private hospital services affordable to common public
- Cutting the length of stay of a patient, which benefits both patient and hospital-reduced cost and availability of bed for the next patient.



THANKYOU

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