

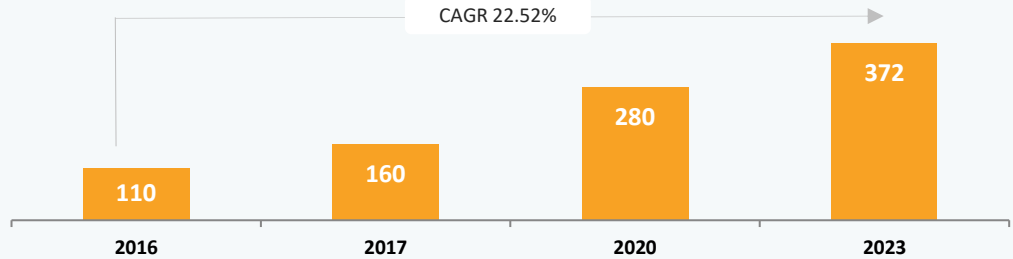


# HEALTHCARE



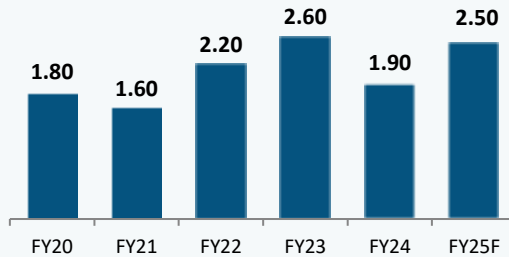
## MARKET SIZE

Healthcare Sector Growth Trend (US\$ billion)



## SECTOR COMPOSITION

Government Healthcare Expenditure (as a percentage of GDP)



Note: F- Forecast

Infrastructure Facts



Number of doctors reached 1.3 million in November 2022

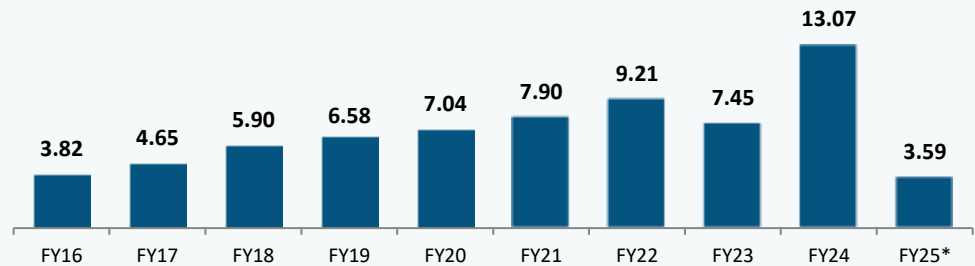


The number of medical colleges reached 758, as of May 2024

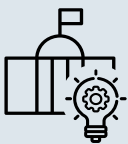


## KEY TRENDS

Health Insurance Premium Collection (US\$ billion)



Note: FY25\* - April-June 2024



## GOVERNMENT INITIATIVES



Public Private Partnership



National AYUSH Mission



'Vision 2035: Public Health Surveillance in India'



Ayushman Bharat Digital Mission



## ADVANTAGE INDIA

- Strong demand:** Rising income, greater health awareness, lifestyle diseases and increasing access to insurance will contribute to growth. The healthcare sector, as of 2024, is one of India's largest employers, employing a total of 7.5 million people. The demand for Indian healthcare professionals is expected to double nationally and globally by 2030 due to a shortage of healthcare workers in India, where there are only 1.7 nurses per 1,000 people and a doctor-to-patient ratio of 1:1,500 nationwide.
- Rising Manpower and Medical Colleges:** Availability of a large pool of well-trained medical professionals in the country. The number of allopathic doctors with recognised medical qualifications (under the I.M.C Act) registered with state medical councils/national medical councils increased to 1.308 million in June 2022, from 0.83 million in 2010.
- Government support:** India's Union Budget 2024-25 emphasizes transforming the healthcare sector through increased digital infrastructure and a revised health expenditure of Rs. 89,287 crores (US\$ 10.70 billion), aiming to enhance accessibility and innovation in healthcare services. The Indian government is planning to introduce a credit incentive programme worth Rs. 500 billion (US\$ 6.8 billion) to boost the country's healthcare infrastructure.
- Attractive opportunities:** The Indian healthcare sector is witnessing unprecedented growth, with private equity and venture capital investments surpassing US\$ 1 billion in the first five months of 2024, marking a 220% increase from the previous year.