

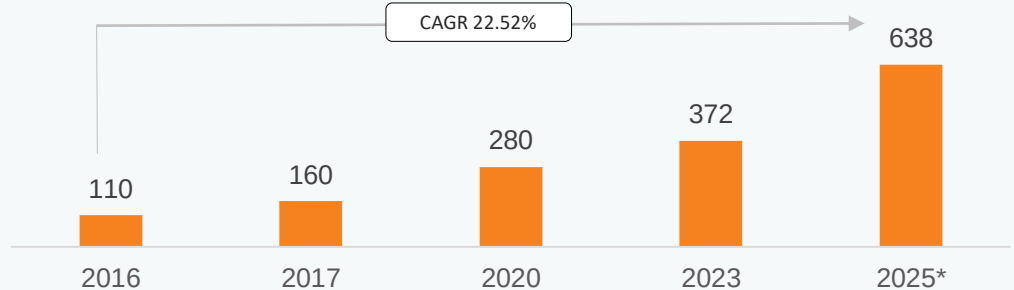


HEALTHCARE



MARKET SIZE

Healthcare Sector Growth Trend (US\$ billion)

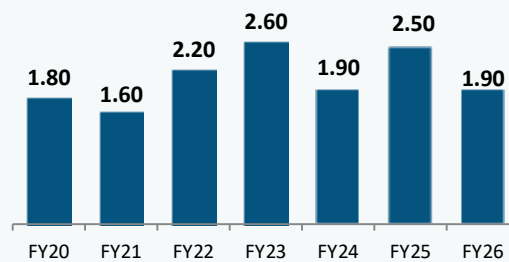


Note: * - Forecast



SECTOR COMPOSITION

Government Healthcare Expenditure (as a percentage of GDP)



Infrastructure Facts



Number of doctors reached 1.38 million in 2025

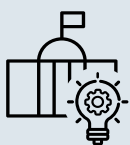
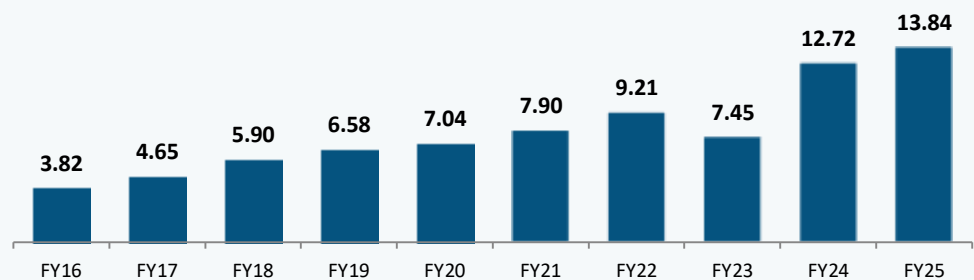


The number of medical colleges reached 780, as of April 2025



KEY TRENDS

Health Insurance Premium Collection (US\$ billion)



GOVERNMENT INITIATIVES



Public Private Partnership



National AYUSH Mission



'Vision 2035: Public Health Surveillance in India'



Ayushman Bharat Digital Mission



ADVANTAGE INDIA

- Strong demand:** 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. By 2025, India will require three million additional hospital beds to achieve the target of three beds per 1,000 people, along with 1.54 million doctors and 2.4 million nurses to address the growing healthcare demand.
- Rising Manpower and Medical Colleges:** India's healthcare workforce has already exceeded 6 million as of CY24. However, this represents only the beginning, as the sector is anticipated to experience substantial growth, with over 6.3 million additional jobs expected by CY30.
- Government support:** The government has allocated Rs. 99,858 crore (US\$ 11.50 billion) to the healthcare sector in the Union budget 2025-26 for the development, maintenance, and enhancement of the country's healthcare system. This reflects a 9.78% increase from the previous allocation of Rs. 90,958 crore (US\$ 10.47 billion) in FY25.
- Attractive opportunities:** The Indian healthcare sector is witnessing unprecedented growth, with private equity investment in Indian healthcare surging to Rs. 4,900 crore (US\$ 572 million) across 33 deals in Q2 CY25.