

Market Survey cum Detailed Techno Economic Feasibility Report on Multispeciality Hospital

Introduction

The Indian healthcare dates back to the Vedic system of healthcare (Ayurveda) in 5000 BC. The Ayurvedic principles of positive health and therapeutic measures relate to physical, mental, social and spiritual welfare of human beings. During the early Vedic period, Ayurveda was perhaps the only system of overall healthcare and medicine. It enjoyed the unquestioned patronage and support of the people and their rulers.

Ayurveda proliferated the most during the Vedic period. The Vedic period is followed by a long medieval history marked by uncertain political conditions and several invasions from outside the country when Ayurveda faced utter neglect and its growth stunted. Unani medicine was brought into India during this time and gained momentum with the extensive support of Mughal emperors. With the British invasion, Allopathy was also brought to India and soon got acceptance for swift results.

Today, with continuous research and development, Aallopathy dominates the Indian health care market. Healthcare industry in India is divided into two segments - services and manufacturing. While the manufacturing segment consists of both medical equipment manufacturing industry and the pharma production, the services segment is basically split into direct services and indirect services.



hospital



Hospitals, health insurance services and R&D services are considered as direct services, while third party insurance, claims settlement services and others, are considered as indirect services. The chart given below shows the structure of the industry. The estimated size of Indian Healthcare industry was USD 35 billion in 2008 and grew at 23 per cent per annum and touched USD 80 billion in 2012 and by 2017 will reach over USD 150 billion.

There is an increasing number of private and public healthcare facilities and are expected to rise in demand for the industry accounting for USD 6.7 billion. A specialty hospital is dedicated to specific sub-specialty care (paediatric centres, oncology centres, psychiatric hospitals). Patients will often be referred from smaller hospitals to a speciality hospital for major operations, consultations with sub-specialists and when sophisticated intensive care facilities are required.

These hospitals have highly trained specialists, high-end technology and provide round the clock services. These hospitals are able to do specialised tests, undertake dialysis for acute renal failure, provide ventilation to patients with respiratory failure and render intensive care to critically ill patients. These hospitals undertake research and have adequate library facilities. These hospitals concentrate on a particular organ of the body and provide medical care e.g., cancer, dental, psychiatry, T.B. etc.



The healthcare equipment sector attracted 8.8 per cent of the total investments in terms of deal value with an aggregate of US\$ 249.01 million (20 deals), according to data released by VCCEdge. The hospital and diagnostics centre in India received foreign direct investment (FDI) worth US\$ 1,597.33 million, while drugs & pharmaceutical and medical & surgical appliances industry registered FDI worth US\$ 10,318.17 million and US\$ 622.99 million,

respectively during April 2000 to March 2013, according to data provided by Department of Industrial Policy and Promotion (DIPP).The diagnostics sector in India has been witnessing immense progress in innovative competencies and credibility. In addition, the emerging sectors, such as bio-generics and pharma packaging are also paving way for the pharmaceutical market to continue its upward trend during FY 2012- 2014 FY.

To determine the feasibility of the project, the first consideration in the survey is to study the character, needs and possibilities of the community which the hospital is going to serve. Based on the health indicators for India released by the WHO, CRISIL Research estimates the Indian healthcare delivery industry to reach Rs 2.3 trillion in 2010-11. As healthcare coverage across the country increases, the industry is expected to register a CAGR of 12 per cent to reach Rs 4.2 trillion in 2015-16.

As private investments have been skewed towards in-patient department (IPD) treatments, its share in the overall market is expected to increase from 64 per cent in 2010-11 to 66 per cent by 2015-16. The growth in demand for healthcare delivery services will be mainly driven by a combination of various factors including changing demographics, increasing income levels, greater health awareness and increasing health insurance coverage.

Investments of over Rs 5.6 trillion required to attain healthcare delivery benchmarks India lags behind several global benchmarks for healthcare delivery. In terms of both healthcare infrastructure and manpower, India ranks below even developing countries like China, Thailand, Sri Lanka and Vietnam in terms of both beds to population and physicians to population ratios. In order to meet the global median of 24 beds per 10,000 population, as per WHO statistics, investments of Rs 5.6 trillion would be required over the next 5 years.

The growth in the healthcare services in the country is primarily driven by the 350 million strong middle class people aspiring for quality healthcare services, thus increasing international confidence on India as a potential, high quality and low cost medical tourism destination. According to the WHO report, India needs to add 80,000 hospital beds each year for the next five years to meet the demands of its growing population.

High quality talent pool, proven track record, favourable government policies, ability to deliver healthcare services at low cost and high quality infrastructure has put India on the global map for outsourcing various healthcare related services. This has been further intensified by Government of India's recent budget declarations, where enough emphasis has been given on setting up of healthcare delivery infrastructure mainly in Tier – I & Tier – II cities.

PRESENT MANUFACTURERS

Alps Hospital Ltd.

Amri Hospitals Ltd.

Apollo Hospitals

Enterprise Ltd.

Apollo Hospitals Intl. Ltd.

Apollo Lavasa Health Corpn.
Ltd.

Artemis Health Sciences
Pvt. Ltd.

Artemis Medical Institute &
Hospitals Pvt. Ltd.

Asia Healthcare Devp. Ltd.

Asian Heart Institute &
Research Centre Pvt. Ltd.

Amrita Hermitage

W. F. H. S. S. Center Pvt. Ltd.

Breach Candy Hospital
Trust

Central Travancore
Specialists Hospital Ltd.

Chandak Hospital &
Research Institute Ltd.

Chennai Meenakshi
Multispeciality Hospital
Ltd.

Crystal Hospitals Ltd.

Deccan Hospitals Corpn.
Ltd. [Merged]

Dr. Agarwal's Eye Hospital
Ltd.

Durgapur Projects Ltd.

Emed Com Technologies Ltd

ESV Health Mart &



Fortis Malar Hospitals Ltd.
Galaxy Care Laparoscopy
Institute Pvt. Ltd.
Ganga Care Hospital Ltd.
Gokuldas Hospitals Ltd.
Goodwill Hospital &
Research Centre Ltd.
Gowri Gopal Hospitals Pvt.
Ltd.
Harvey Health Care Ltd.
Hometrail Buildtech Pvt.
Ltd.
Hometrail Estate Pvt. Ltd.
Imperial Hospital &
Research Centre Ltd.

J a y a D i a g n o s t i c & R e s e a r c h
C e n t r e L t d .

J u b i l a n t F i r s t T r u s t
H e a l t h c a r e L t d .

K M C S p e c i a l i t y H o s p i t a l s
(I n d i a) L t d .

K e s h l a t a C a n c e r H o s p i t a l
L t d .

K e t k i R e s e a r c h I n s t i t u t e O f
M e d i c a l S c i e n c e s L t d .

K o v a i M e d i c a l C e n t e r &
H o s p i t a l L t d .

L a k e s h o r e H o s p i t a l &
R e s e a r c h C e n t r e L t d .

L o t u s E y e C a r e H o s p i t a l
L t d .

M a n a l a c e n t H o s p i t a l L t d .

N a g a r j u n a A y u r v e d i c C e n t r e
L t d .

N a g a r j u n a H o s p i t a l s L t d .

N a i r s o n s M e d i c a l S e r v i c e s
L t d .

N e w r i s e H e a l t h c a r e P v t .
L t d .

N o i d a M e d i c a r e C e n t r e L t d .

O n n u K u r a e A y i r a m Y o g a m
M i s s i o n H o s p i t a l L t d .

P e e r l e s s H o s p i t e x H o s p i t a l
& R e s e a r c h C e n t e r L t d .

P u l i k k a l M e d i c a l F o u n d a t i o n
Q u a l i t y C a r e I n d i a L t d .

R M C M e d L t d .

R a i a s t h a n C a n c e r C u r e
d .

S R L Diagnostics Private
Ltd.

S R L Ltd.

Sada Sharada Tumour &
Research Institute.

Sahara India Medical
Institute Ltd.

Sahyadri Hospitals Ltd.

Samudra Healthcare
Enterprises Ltd.

Saumya Medicare
International Ltd.

Sharma East India Hospitals
& Medical Research Ltd.

Shushrusha Citizens' Co-Op

Healthcare Ltd.

Sri Medica Pvt. Ltd.

S u s h r u t a M e d i c a l A i d &
R e s e a r c h H o s p i t a l L t d .
T a m i l n a d H o s p i t a l L t d .
T r i c h u r H e a r t H o s p i t a l L t d .
T r i v a n d r u m I n t e r n a t i o n a l
H e a l t h S e r v i c e s L t d .
T r i v a n d r u m M e d i c a l
S p e c i a l i t y S e r v i c e s L t d .
V a l l u v a n a d H o s p i t a l
C o m p l e x L t d .
V i s a k h a H o s p i t a l s &
D i a g n o s t i c s L t d .
W i n H e a l t h C a r e P v t . L t d .
W o c k h a r d t H o s p i t a l L t d .
T r i v a n d r u m H o s p i t a l s L t d .

PROJECT AT A GLANCE

PROJECT AT A GLANCE				(Rs. in lacs)			
COST OF PROJECT				MEANS OF FINANCE			
Particulars	Existing	Proposed	Total	Particulars	Existing	Proposed	Total
Land & Site Development Exp.	0.00	290.00	290.00	Capital	0.00	1944.53	1944.53
Buildings	0.00	1000.00	1000.00	Share Premium	0.00	0.00	0.00
Plant & Machineries	0.00	5280.47	5280.47	Other Type Share Capital	0.00	0.00	0.00
Motor Vehicles	0.00	125.00	125.00	Reserves & Surplus	0.00	0.00	0.00
Office Automation Equipments	0.00	383.50	383.50	Cash Subsidy	0.00	0.00	0.00
Technical Knowhow Fees & Exp.	0.00	75.00	75.00	Internal Cash Accruals	0.00	0.00	0.00
Franchise & Other Deposits	0.00	0.00	0.00	Long/Medium Term Borrowings	0.00	5833.58	5833.58
Preliminary & Pre-operative Exp	0.00	7.50	7.50	Debentures / Bonds	0.00	0.00	0.00
Provision for Contingencies	0.00	530.00	530.00	Unsecured Loans/Deposits	0.00	0.00	0.00
Margin Money - Working Capital	0.00	86.64	86.64				
TOTAL	0.00	7778.11	7778.11	TOTAL	0.00	7778.11	7778.11

PROJECT AT A GLANCE

Year	Annualised		Book Value	Debt	Dividend	Retained Earnings		Payout	Probable Market Price	P/E Ratio	Yield Price/ Book Value
	EPS	CEPS	Per Share		Per Share	Per Share				No.of Times	
	Rs	Rs	Rs	Rs	Rs	%	Rs	%	Rs		%
1-2	5.48	10.78	15.48	24.00	0.00	100.00	5.48	0.00	5.48	1.00	0.00
2-3	7.88	12.42	23.36	18.00	0.00	100.00	7.88	0.00	7.88	1.00	0.00
3-4	10.31	14.21	33.66	12.00	0.00	100.00	10.31	0.00	10.31	1.00	0.00
4-5	12.73	16.09	46.40	6.00	0.00	100.00	12.73	0.00	12.73	1.00	0.00
5-6	15.13	18.01	61.53	0.00	0.00	100.00	15.13	0.00	15.13	1.00	0.00



PROJECT AT A GLANCE

Year	D. S. C. R.			Debt / - Deposits Debt	Equity as- Equity	Total Net Worth	Return on Net Worth	Profitability Ratio					Assets Turnover Ratio	Current Ratio
	Individual	Cumulative	Overall					GPM	PBT	PAT	Net Contribut ion	P/V Ratio		
	(Number of times)			(Number of times)		%	%	%	%	%		%		
Initial				3.00	3.00									
1-2	1.51	1.51		1.55	1.55	1.60		45.35%	29.50%	23.36%	4287.90	94.00%	0.59	0.89
2-3	1.75	1.62		0.77	0.77	0.81		52.79%	41.69%	28.79%	5002.54	94.00%	0.65	1.81
3-4	2.04	1.75	2.05	0.36	0.36	0.39		57.84%	50.30%	32.95%	5717.19	94.00%	0.67	2.96
4-5	2.41	1.89		0.13	0.13	0.15		61.33%	56.55%	36.19%	6431.83	94.00%	0.66	4.33
5-6	2.86	2.05		0.00	0.00	0.02		63.73%	61.15%	38.70%	7146.48	94.00%	0.62	33.10

PROJECT AT A GLANCE

BEP

BEP - Maximum Utilisation Year	5
Cash BEP (% of Installed Capacity)	27.10%
Total BEP (% of Installed Capacity)	34.95%

IRR, PAYBACK and FACR

Internal Rate of Return .. (In %age)	27.77%
Payback Period of the Project is (In Years)	2.814 Years
Fixed Assets Coverage Ratio (No. of times)	1.880

See more

<http://goo.gl/VLdxvP>

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Our Approach

Requirement collection

Thorough analysis of the project

Economic feasibility study of the Project

Market potential survey/research

Report Compilation

Who do we serve?

- *Public-sector Companies*
- *Corporates*
- *Government Undertakings*
- *Individual Entrepreneurs*
- *NRI's*
- *Foreign Investors*
- *Non-profit Organizations, NBFC's*
- *Educational Institutions*
- *Embassies & Consulates*
- *Consultancies*
- *Industry / trade associations*

Sectors We Cover

- *Ayurvedic And Herbal Medicines, Herbal Cosmetics*
- *Alcoholic And Non Alcoholic Beverages, Drinks*
- *Adhesives, Industrial Adhesive, Sealants, Glues, Gum & Resin*
- *Activated Carbon & Activated Charcoal*
- *Aluminium And Aluminium Extrusion Profiles & Sections,*
- *Bio-fertilizers And Biotechnology*
- *Breakfast Snacks And Cereal Food*
- *Bicycle Tyres & Tubes, Bicycle Parts, Bicycle Assembling*

- *Bamboo And Cane Based Projects*
- *Building Materials And Construction Projects*
- *Biodegradable & Bioplastic Based Projects*
- *Chemicals (Organic And Inorganic)*
- *Confectionery, Bakery/Baking And Other Food*
- *Cereal Processing*
- *Coconut And Coconut Based Products*
- *Cold Storage For Fruits & Vegetables*
- *Coal & Coal Byproduct*

- *Copper & Copper Based Projects*
- *Dairy/Milk Processing*
- *Disinfectants, Pesticides, Insecticides, Mosquito Repellents,*
- *Electrical, Electronic And Computer based Projects*
- *Essential Oils, Oils & Fats And Allied*
- *Engineering Goods*
- *Fibre Glass & Float Glass*
- *Fast Moving Consumer Goods*
- *Food, Bakery, Agro Processing*

- *Fruits & Vegetables Processing*
- *Ferro Alloys Based Projects*
- *Fertilizers & Biofertilizers*
- *Ginger & Ginger Based Projects*
- *Herbs And Medicinal Cultivation And Jatropha (Biofuel)*
- *Hotel & Hospitality Projects*
- *Hospital Based Projects*
- *Herbal Based Projects*
- *Inks, Stationery And Export Industries*

- *Infrastructure Projects*
- *Jute & Jute Based Products*
- *Leather And Leather Based Projects*
- *Leisure & Entertainment Based Projects*
- *Livestock Farming Of Birds & Animals*
- *Minerals And Minerals*
- *Maize Processing(Wet Milling) & Maize Based Projects*
- *Medical Plastics, Disposables Plastic Syringe, Blood Bags*
- *Organic Farming, Neem Products Etc.*

- *Paints, Pigments, Varnish & Lacquer*
- *Paper And Paper Board, Paper Recycling Projects*
- *Printing Inks*
- *Packaging Based Projects*
- *Perfumes, Cosmetics And Flavours*
- *Power Generation Based Projects & Renewable Energy Based Projects*
- *Pharmaceuticals And Drugs*
- *Plantations, Farming And Cultivations*
- *Plastic Film, Plastic Waste And Plastic Compounds*
- *Plastic, PVC, PET, HDPE, LDPE Etc.*

- *Potato And Potato Based Projects*
- *Printing And Packaging*
- *Real Estate, Leisure And Hospitality*
- *Rubber And Rubber Products*
- *Soaps And Detergents*
- *Stationary Products*
- *Spices And Snacks Food*
- *Steel & Steel Products*
- *Textile Auxiliary And Chemicals*

- *Township & Residential Complex*
- *Textiles And Readymade Garments*
- *Waste Management & Recycling*
- *Wood & Wood Products*
- *Water Industry(Packaged Drinking Water & Mineral Water)*
- *Wire & Cable*

Niir Project Consultancy Services

106-E, Kamla Nagar, New Delhi-110007, India.

Email: npcs.ei@gmail.com , info@entrepreneurindia.co

Tel: +91-11-23843955, 23845654, 23845886

Mobile: +91-9811043595

Fax: +91-11-23841561

Website : www.entrepreneurindia.co

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