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Neonatal Equipment Market in India

2010-2014

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1. Introduction

Indian Neonatal market reached \$xx million in 2010, basically driven by a combination of xx and xx. Going further, the market is forecast to grow by nearly xx percent in next four years.

The Neonatal equipment market is having a spectacular growth rate from past few years in India. The market grew at an average rate of more than xx percent in past three years. The market is driven by xx, xx and xx, xx.

Definition:

Neonatal equipment mainly includes the following:

- Equipment for thermal control – Major products under this category are Radiant warmers, Incubators and Transport incubators
- Monitoring Devices– Major products under monitoring category are Pulse Oximeter, Apnea monitors, Bilirubinometer etc,
- Therapy Equipment – Phototherapy unit is one of the major product segments under this category
- Life saving equipment– CPAP machines, Ventilators, Concentrator, etc,
- Others (equipment such as Bilirubin Analyser, Fluxmeter, Oxygen Analyzer etc,)

Context and Scope of the study

The report covers and analyses the market for Neonatal Equipments in India. It provides current market values and future prospects of the market. Further, the report also discusses various trends and drivers in the Neonatal Equipment market in India. It also provides overview of the leading players operating in the market.

2. Market Size, Outlook and Segmentation

2.1 Indian Healthcare Industry

Healthcare Industry is one of the largest industries with xx growth rate in India. The industry accounts for nearly xx percent of Indian Gross domestic Product (GDP). Public expenditure on healthcare in India is around xx percent of the GDP and private healthcare sector contributes nearly xx percent of the GDP.

Currently, the Indian Healthcare Industry is estimated at \$xx billion and is expected to reach over \$xx billion by 2014. Factors such as xx, xx, xx, xx, xx, xx, etc, are driving the growth.

In the healthcare, medical equipment market segment is one of the top growth markets in India. The medical equipment market is estimated to be \$xx million in 2010 and it is forecast to reach \$xx million by 2014. The market is highly dependent on imports, with more than xx percent of the demand fulfilled by imports. The United States is one of the leading suppliers of medical equipments to Indian market.

Table 1: Indian Healthcare Market 2010 - 2014

	2010	2014
Market Size (\$ billions)	xx	xx
CAGR	xx	

Source: Linarch

Table 2: Indian Medical Equipment Market 2010 - 2014

	2010	2014
Market Size (\$ millions)	xx	xx
CAGR	xx	

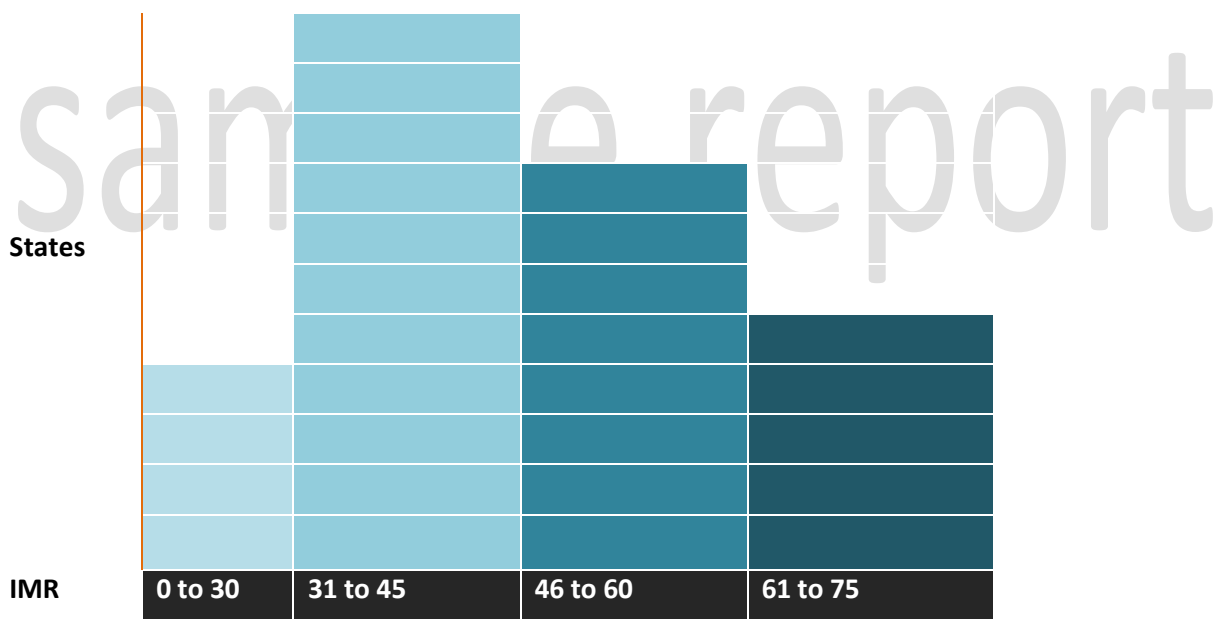
Source: Linarch

2.2 Neonatal Equipment Market

India is the second most populous country in the world. Country records more than xx births per xx populations. By 2025, India is forecast to become world’s most populous country. Annually, nearly xx million babies are born in India, which accounts for nearly xx percent of global births.

In conjunction with the large population, India’s Infant Mortality rate is also very high. In 2008, IMR in India was xx deaths per 1,000 live births; urban IMR was xx, while rural was xx. Although, India’s IMR has declined from xx deaths per 1,000 live births in 1971 to xx in 2008, it is still very high compared to other developing and developed nations.

Exhibit 1: IMR per 1,000 Births across States in India



Source: Ministry of Health & Family Welfare, India

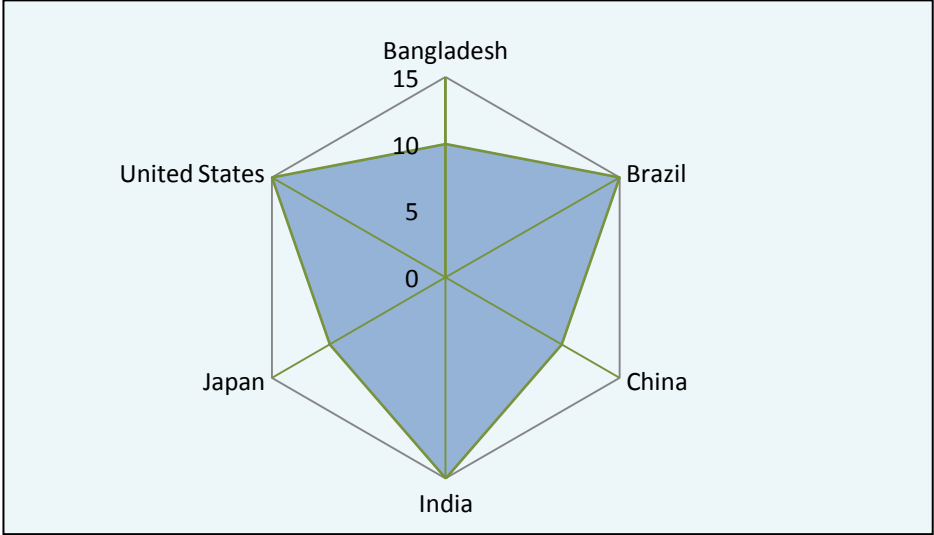
Table 3: Infant and Neonatal Deaths across States in India

State	% of Infant Deaths to Total Deaths	% of Neonatal Deaths to Infant Deaths	% of Early Neonatal Deaths to Infant Deaths	Per Capita health Expenditure (\$)
Andhra Pradesh				
Assam				
Bihar				
Chhattisgarh				
Delhi				
Gujarat				
Haryana				
Himachal Pradesh				
Jammu & Kashmir				
Jharkhand				
Karnataka				
Kerala				
Madhya Pradesh				
Maharashtra				
Orissa				
Punjab				
Rajasthan				
Tamil Nadu				
Uttar Pradesh				
West Bengal				

Source: Ministry of Health & Family Welfare, India

Exhibit below provides comparison of Indian IMR with other developing and developed countries.

Exhibit 2: IMR per 1,000 Births – Comparative Figures



Source: Linarch

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Table 4: Indian Neonatal Equipment Market 2010

	2009	2010
Market Size (\$ millions)	xx	xx
Growth Rate	xx	

Market Outlook

The Market for Neonatal Equipments in India is forecast to grow from \$xx million in 2010 to \$xx million by 2012 and \$xx million by 2014. The market is estimated to witness a growth rate of xx percent CAGR in 2010-2014.

Table 5: Indian Neonatal Equipment Market Forecast 2014

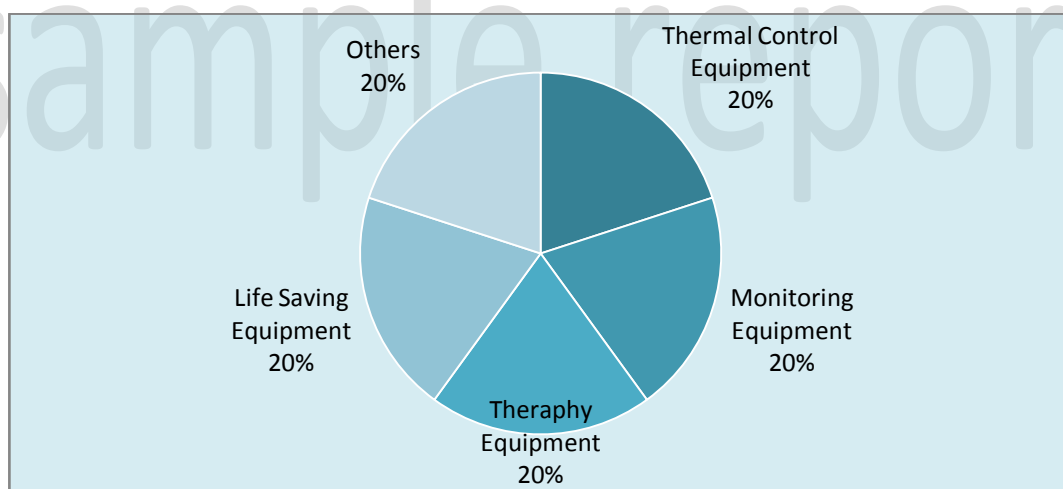
	2010	2011	2012	2013	2014
Market Size Forecast (\$ millions)	xx	xx	xx	xx	xx
CAGR	xx				

Source: Linarch

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Market Segmentation

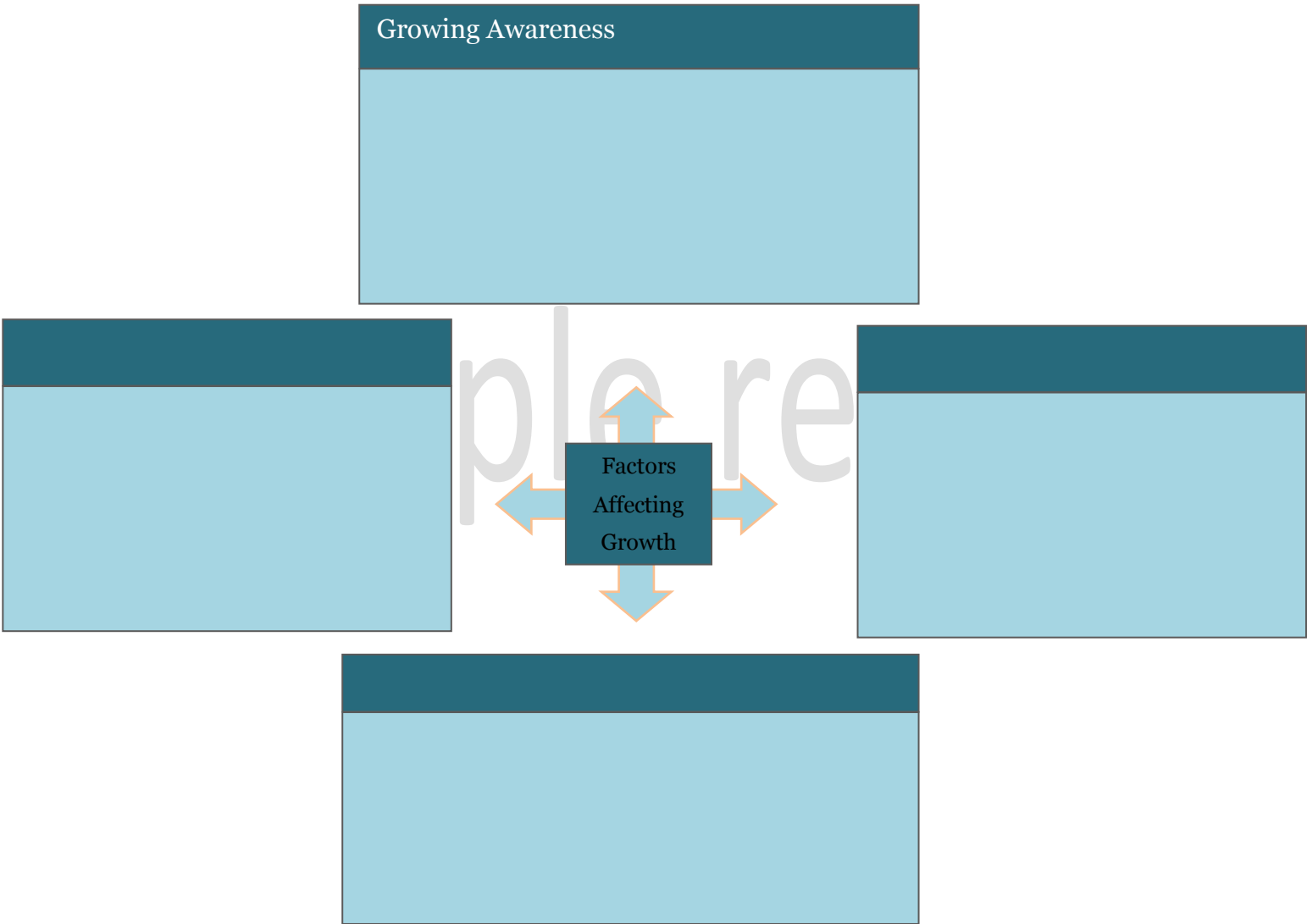
Exhibit 3: Indian Neonatal Equipment Segmentation



Source: Linarch

2.3 Factors Affecting Growth

Exhibit 4: Factors Affecting Neonatal Equipment Market in India



3. Vendor Landscape

From past few decades, India has witnessed tremendous growth in the economy. With this growth, country has witnessed rise in income levels, change in lifestyle and increasing awareness about quality healthcare among educated population. As a result, people in the country are demanding high quality Neonatal facilities.

The growth in Neonatal industry in India has influenced many companies to enter the market. Broadly, the players in the market can be classified in to following three segments.

- Indian Companies
- Multinationals
- Importers (Marketing Companies)

Indian Companies:

Multinationals:

Importers (Marketing Companies):

3.1 Leading Players in the Market

The Indian Neonatal Equipment market constitutes of multinational companies, medium sized Indian companies, importers and large number of small Indian companies. Factors such as wide geographical presence, strong product portfolio and competitive prices are crucial for these companies to gain success in the Indian Neonatal market.

Geographical Presence

Product Portfolio

Cost **sample report**

3.1.1 Phoenix Medical Systems

Basic Overview:

Headquartered in Chennai, India, Phoenix Medical Systems is one of the leading players in Indian Neonatal Equipment Market. It manufactures and sells Neonatal products in India along with exporting to nearly 35 countries worldwide.

No. of Employees – xx

Year of Establishment - xx

Contact Details

32/4, Jawaharlal Nehru Salai, Ekkattuthangal,
Chennai - 600 097, Tamil Nadu, India

Ph: + (91)-(44)-22251177

Fax: + (91)-(44)-22250194

Product Portfolio:

- Comprehensive Infant Care Center
- Neonatal Open Care System
- Radiant Warmer
- Transport Incubator
- Neonatal Phototherapy Units
- Delivery Table
- Examination Couch
- Electronic Baby Weighing Scale
- Infant Bassinet
- Oxy Monitor & Apnea Monitor

Go-to-market Strategy

- Direct Sales
- Distributors
- Online Sales

Geographical Presence

Headquarters – Chennai, South India

Service Locations – Around 11

Regional Offices – Hyderabad, Kolkata, Delhi

Distributors – Across India

Strengths

- **Strong OEM supplier:** Major OEM supplier to medical equipment manufacturers in the world
- **Partnership with GE Healthcare:** Manufacturing and distribution partnership with GE Healthcare in India
- **R&D investments:** Investment in R&D including tie-ups with Indian Institute of Technologies (IITs) to launch affordable infant care products in India

Weakness

- **Presence restricted to urban centres:** Phoenix's presence is restricted largely to state-run and corporate hospitals in cities in India. However, company is planning to expand in to rural areas. Recently, company has partnered with United States based non-profit technology design firm D-Rev for marketing and distribution of D-Rev's low cost neonatal phototherapy device in India.

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3.2 Distribution Channels for Neonatal Equipments

Distribution of Neonatal Equipments in India is carried through one or more of the following distribution systems.

- Direct distribution
- Distribution through distributing agents and retailers
- Online sales
- Importers

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Exhibit 5: Distribution Channels for Neonatal Equipments in India

Source: Linarch

Direct Distribution

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Distribution through distributing agents and retailers

Online Sales

Importers

3.3 Neonatal Equipment Distributors in India

Following are some of the importers of Neonatal Equipment in India

3.3.1 Global Medical Systems

Global Medical Systems is one of the leading Neonatal Equipment distributors in India. Headquartered in Delhi, the company distributes products of many leading global Neonatal equipment manufacturers such as Ginevri Technologie. It also distributes products from leading Indian Neonatal Manufacturers.

Contact Details:

B1/34, MODEL TOWN-II,

GROUND FLOOR,

Delhi - 110009, India

Ph: +91-11-27215547

Fax: +91-11-27115021

3.3.2 Player2

3.3.3 Player3

3.3.4 Player4

4. Key Trends & drivers

Following are the key trends and drivers of the Neonatal Equipment market in India:

Preterm and Low Birth Weight Challenges

Pre term birth and low weight babies are two of the major challenges for Neonatal healthcare in India. Out of the total births in India, more than 35 percent are born with Low Birth Weight and more than 25 percent of neonatal deaths are due to preterm birth. To counter these problems and reduce Neonatal deaths, Government is making large investments in improvement of neonatal facilities through various packages across the country. Furthermore, private sector hospitals are also upgrading their Neonatal infrastructure to efficiently provide neonatal services to demanding customers. Besides, social organizations are supplying basic Neonatal equipments for hospitals in rural India. These investments by all the three segments are forecast to continue for next many years to reduce Neonatal deaths, thus driving Neonatal Equipment market.

Trend & Driver2

Trend & Driver3

Trend & Driver4

Trend & Driver5

Trend & Driver6

4.1 Market Inhibitors

Although the Indian Neonatal Equipment market is witnessing significant growth rate from past few years, there are also many challenges faced by the industry. Following are some of the issues affecting the Indian Neonatal Equipment market.

Issues with Serviceability of Equipment

Service and repair is one the major challenge faced by neonatal Equipment consumers across India and across customer segments. Most of the Neonatal Equipment manufacturers frequently fail in delivering timely and productive after-sale service and repair (including spares availability) for the customers. Many a times, customers face very challenging situations in dealing with service, repair and spares availability issues.

Inhibitor2

Inhibitor3

Inhibitor4

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Appendix

1. Industry Associations

2. Regulatory Environment

3. Key Industry Contacts

Sample Report - Randomized Data

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