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# LIFE > CANCER

Gone are the days when cancer diagnosis meant that life was over. Today, cancer patients not only have access to the latest treatment plans but are also aware that a love for life and looking forward to life goes a long way in successful treatment and living a healthy, beautiful life after cancer.

The so-called emperor of maladies – the big C – and the greatest equalizer meets its match in those who have beaten cancer, survived and thrived. They all have a message to people battling cancer: a message of triumph, victory and one that is achieved without battling an eyelid.

# Lifestyle and its correlation to cancer

India is likely to have over 17.3 lac new cancer cases and 8.8 lac deaths due to the disease by 2020. Cancers of breast, lung and cervix could top the list.

Estimated number of people living with the disease to be around 2.5 million.

14.5 lac new cancer cases in 2016. Numbers to reach 17.3 lac new cases by 2020.

On an average one in about 15 men and one in about 12 women in the urban centres likely to develop cancer in their lifetime.

Around 2,500 persons die due to tobacco related diseases in India every day.

Smoking of tobacco accounts for one in 5 deaths among men and one in 20 deaths among women.

Tobacco accounts for 30% of all cancers in males and females in India.

Oral cancer is common in India amongst men (11.28%), and the fifth most frequently occurring cancer amongst women (4.3%) and the third most frequently occurring cancer in India amongst men and women.

Cancer of the cervix is the third most common cancer with estimated 1 lac new cases in 2016 and about 1.04 lac during 2020.

Cancers of oral cavity and lungs in males; and cervix and breast in females account for over 50% of all cancer deaths in India.

Breast and Cervical cancers are the most common cancers in India in women.

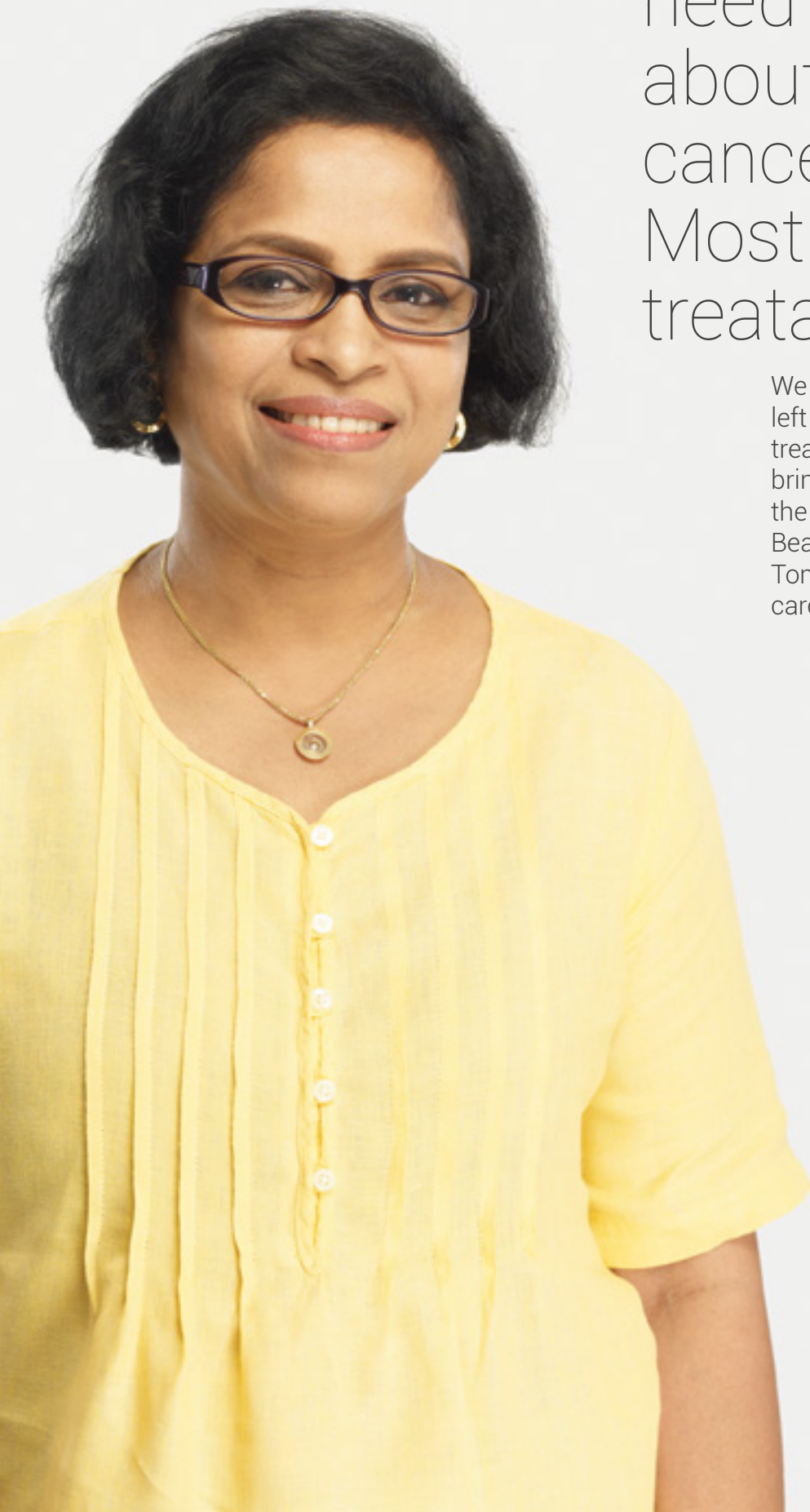
Breast Cancer accounts for 27% and Cervical Cancer accounts for 22.86% of all cancer cases in women and 12% of all cancer cases in men and women.

Cancer of the lung is the next with estimated 1.14 lac (83,000 in males and 31,000 in females) new cases during 2016 and 1.4 lac cases in 2020.

Only 12.5% of patients come for treatment in early stages.

The proportion of childhood cancers relative to all cancers reported by Indian cancer registries varied from 0.8% to 5.8% in boys, and from 0.5% to 3.4% in girls.

Leukaemia and lymphoma were the commonest malignancies in boys whereas leukaemia and brain tumours were commonest in girls.



Here is what you  
need to know  
about untreatable  
cancer.  
Most of them are  
treatable.

We believe that no patient should be left without the hope of successful treatment. Which is why we pioneered bringing world-class technologies like the Cyberknife, Agility Synergy, True Beam, Artiste with CT on Rails and Tomotherapy H to redefine cancer care in India.





## Overview of the Indian healthcare industry

For decades, India's muted healthcare spending was the result of a relatively low presence of accessible, available and affordable healthcare services on one hand coupled with low incomes on the other. This reality is being corrected faster than ever. An increase in healthcare awareness is driving investments in the sector; increased incomes are also catalysing healthcare expenditure. Today, the healthcare sector in India has become one of the largest in terms of revenue and employment. The Indian healthcare sector is also growing at a rapid pace as a result of its strengthening spectrum of services and increasing expenditure by public as well private players.

In India, the healthcare sector is bucketed into two major spectrums - public and private. The Government - managed public healthcare system comprises of limited secondary and tertiary care institutions in key cities, which focus on providing basic healthcare facilities in rural areas. The private sector provides secondary, tertiary and quaternary care with a major concentration in Tier I and Tier II cities.

Over the last two decades, a majority of tertiary care institutions in the public sector have been facing a resource crunch resulting in their inability to maintain equipment, pay for consumables and upgrade their infrastructure to meet the growing demand for complex diagnostic and therapeutic treatments. As a result, there is an increasing preference for private hospitals.

Today, the private sector plays a dominant role in the delivery of healthcare services in India. It is predominant in medical education, training, diagnostics and technology, manufacture of pharmaceuticals, hospital design, and in the construction and management of ancillary services. Over 75% of the human resources and advanced medical technology, 68% of all hospitals and 37% of total hospital beds in India are in the private sector.

Further, the sector has grown rapidly in the last few years, witnessing the emergence of several large private players and attracting large capital investment. The growing dominance of the private sector and the consequent increase in competitive forces, is transforming the Indian healthcare sector from a supply driven market to a demand driven/consumer-centric market.

Today, healthcare in India has increasingly become technology-driven, comprising the development of new drugs/vaccines, medical devices/equipment, and diagnostic techniques. The last decade witnessed a significant change in the delivery of healthcare services, with technology having a key role to play. Technological advancements have been made in the field of imaging, facilitated to deliver faster and more reliable diagnosis, with reduced doses, procedure time and new interventional application. Considerable advancements have also been made in several other areas, with the introduction of advanced medical technology, improving the ability of monitor, prevent, diagnose, control, and cure a number of growing health conditions.

Healthcare providers are increasingly adopting technology to derive various benefits, including improved patient satisfaction (through reduced turnaround time at points of care), enhanced patient safety (through improved decision-making), enhanced productivity and elimination of human error (by way of seamless integration with medical device/equipment), reduction in operational costs (through reduction in staff needed for back-office tasks), improved inventory management (by way of accurate demand estimation and timely procurement and distribution of materials), among others.

The Indian healthcare sector, one of the fastest growing industries, is expected to advance at a CAGR of 22.9% during 2015–20 to reach USD 280 billion. There is immense scope for enhancing healthcare services penetration in India, representing ample opportunity for the development of the healthcare industry.

Considering that the healthcare spending in India translates into a huge rise in the percentage of Gross Domestic Product (GDP), there is a vast scope for enhancing healthcare services. Rural India accounts for more than 70% of the population of the country and is set to emerge as a potential demand source for healthcare services.

India requires 600,000 to 700,000 additional beds over the next five to six years, indicative of an investment opportunity of USD 25-30 billion. Given this demand for capital, the number of transactions in the healthcare space is expected to witness an increase in the near future. The average investment size by private equity funds in healthcare chains has already increased to USD 20-30 million from USD 5-15 million.

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(Source: India Brand Equity Foundation)

# Beating the burden of cancer

India is likely to have over 17.3 lac new cases of cancer and over 8.8 lac deaths due to the disease by 2020 with cancers of breast, lung and cervix topping the list. Data has also revealed that only 12.5% of patients come for treatment in the early stages of the disease.

(Source: Indian Council of Medical Research, <http://icmr.nic.in/icmrsql/archive/2016/7.pdf>)

Based on the recent studies, breast cancer tops the list in female cancers, while lung cancer tops the list in male cancers. Cancer of breast with estimated 1.5 lac (over 10% of all cancers) new cases during 2016, is the number one cancer overall. Cancer of the lung is the next with an estimated 1.14 lac (83,000 in males and 31,000 in females) new cases during 2016 and 1.4 lac cases in 2020. Cancers associated with the use of tobacco account for about 30% of all cancers in males and females.

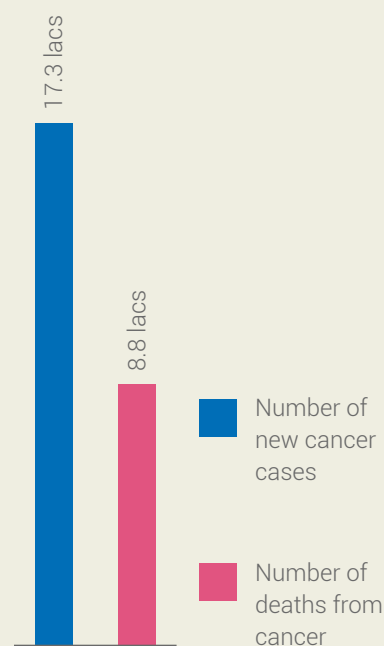
(Source: Indian Council of Medical Research)

Within India's health care industry, the incidence of lifestyle diseases is expected to increase faster than any

other segment; within the lifestyle space, we see the occurrence of cancer increasing faster than ever. In India the subject of cancer is a moving goalpost.

The reported cancer incidence in India is based on data collected from cancer registries, which cover less than 10% of the population, resulting in a significant margin of estimation error. There is also evidence to suggest that much of the problem in India is the result of low awareness that, in turn, results in staggered diagnosis and delayed treatment. Less than 1% of women in India aged between 40 and 69 years participated in recommended breast screening mammograms once in 24 months, compared to 32% in China and 67% in the United States in 2015. The result is that between 2009 and 2011, only 4% breast cancer cases were diagnosed at early stages (i.e., Stage I or Stage II) of the disease in India; the corresponding number was 62% in the United States, 81% in the United Kingdom and 72% in China, holding out positive prospects for companies like HCG in combating one of mankind's most lethal killers.

## Estimates of cancer incidence and mortality by 2020



The rate of cancer mortality is almost equal among male and female cancer patients

# Gearing for the future

Even as there is growing cancer awareness coupled with increased incomes, the challenging reality is a dearth of adequate infrastructure and mass screening programs for accurate and affordable diagnosis in India. For instance, as of 2014, there were only 2,700 mammograms in India, or 1 per 220,000 women, compared to 1 per 10,000 women in the United States. Besides there were only 121 PET-CT scanners installed in India in 2015, a majority in metropolitan cities, making it increasingly challenging to accurately diagnose, stage and monitor cancer.

(Source: Ernst & Young)

For the successful address of cancer incidence in India, the availability of diagnostic equipment and infrastructure are not enough; what is critical in this price-sensitive geography is the affordable service pricing. It is here that India is attractively placed. Even at for-profit hospitals in India, the cost of cancer care, including treatment with advanced technologies like PET-CT and LINAC-based radiation therapy is one of the lowest in the world and a fraction of the treatment cost in the United States and Europe after adjusting for purchasing power parity. However, the irony is that despite this encouraging reality, quality cancer

care continues to be unaffordable and inaccessible to a large proportion of the Indian population.

An addition of 3 million beds is needed for India to achieve the target of 3 beds per 1,000 people by 2025. Further, 1.54 million doctors and 2.4 million nurses are required to meet the growing demand for healthcare. An investment of USD 86 billion is required to achieve these targets.

Over USD 200 billion is expected to be spent on medical infrastructure by 2024.

(Source: Deloitte)



A portrait of a middle-aged woman with dark brown hair, smiling slightly. She is wearing a light blue and gold striped sari and a pearl necklace. The background is plain white.

The lump in your breast  
has no business getting  
in the way of your life.

The Tomotherapy H technology at HCG provides radiation for breast cancer tumours that allow patients to get back to normal health in the least amount of time possible.

With unbeatable precision, real-time delivery analysis, minimal side-effects and the ability to treat inoperable, hard-to-reach tumours, the Tomotherapy H is here to change cancer care in India.

# The growing footprint

With increasing urbanisation and problems related to modern-day living in urban settings, about 50% of spending on in-patient beds is for lifestyle diseases, increasing the demand for specialised care. In India, lifestyle diseases have replaced traditional health problems.

HCG was one of the first hospital chains to focus on Tier II and Tier III cities. There is a substantial demand for quality and specialist healthcare services in India's Tier-II and Tier-III cities.

In FY16, the gross direct premium income from health insurance stood at 25.4% of overall gross direct premium income for non-life insurance segment. Health insurance is gaining momentum in India; gross healthcare insurance premium was USD 2.9 billion in 2013, expanding at a CAGR of 26% over FY08-13.

This trend is likely to continue, benefiting the country's healthcare industry.

(Source: IRDA, CII, Grant Thornton, Gartner, Technopak, PwC, TechSci Research)

## A ray of hope

From what has been indicated, it would appear that the scenario is grim and that mankind is staring into a dark tunnel. At HealthCare Global Enterprises, we perceive hope. There is growing cancer awareness, a stronger emphasis on screening and improvements in cancer diagnosis. The result is that, even as the numbers in India appear discouraging at first glance, the needle has indeed

moved and cancer diagnosis is now happening quicker and more comprehensively across the country. As the largest dedicated cancer adversary in India, we believe that while timely diagnosis could result in lower mortality rates, it is also expected to increase reported cancer incidence in the next five years, widening opportunities for our company.

## How a baby had a mother

Curing a cancerous spinal cord and giving it the life a mother needs.

41-year old Rabea Abdul was pregnant with her precious first baby in Kuwait when a spinal malignancy was diagnosed. Post pregnancy, the disease spread, disabling her. She turned to the HCG Centre of Excellence for help. At HCG, our multi-disciplinary team used the cutting-edge Cyberknife technology to remove the tumour from a region previously deemed inoperable. She can now hold her baby up high.