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A market with structural growth opportunities

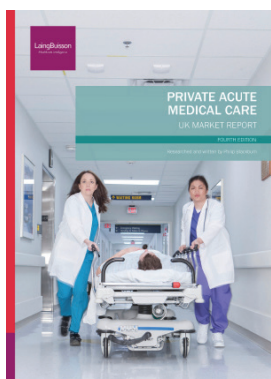
Worth over £6 billion last year, the private acute medical care market has in recent years benefited from growth in the self-pay market, strong NHS spending and a healthy international funding stream.

However, while a cyclical high in the proportion of long-waits triggered wider interest in the market, core historic market drivers saw their growth decelerate last year. The largest funding source for independent sector acute hospitals and clinics, private medical cover payouts grew only marginally in real terms during the past 12 months holding back stronger growth for the sector. Although NHS purchasing through patient choice continued its progressive growth trend, there was a noticeable drop in local 'spot' contract business with the NHS to clear waiting lists, as Trusts kept more work in-house following the removal of waiting list penalties for those in deficit. Meanwhile revenues from international patients increased more modestly as a wider field of global competitors opens up.

Nonetheless, a good amount of new capacity has entered in the past 24 months or so, and equally a number of new facilities are due to come on stream in the near future.

A growing trend towards outpatient care continues, as incumbent hospital groups and new providers develop wider diagnostics and treatment facilities on sites removed from hospitals with state-of-the-art equipment.

There are favourable drivers for UK private acute medical care hospitals and clinics going forward but also notable risks on the horizon. Drawing upon proprietary research and data sources this market report from LaingBuisson provides an invaluable picture of the current market, detailed trend analysis and expertise on the future of private acute medical care across the UK.



What the report covers

UK Hospitals & Clinics Overview
Funding
Market Structure
- PMI
- NHS Purchasing
- Self-pay
NHS Private Patients
Other Market Components
Activity
Specialists
Political Environment & the NHS
Regulation
Futures

Financial Appendix

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This market report from LaingBuisson covers the provision of acute medical care services by private (non-NHS) providers, and the provision of private acute medical care services by NHS providers within Private Patient Units (PPUs).