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LaingBuisson
INTELLIGENCE + INSIGHT

PRIVATE ACUTE HEALTHCARE
UK MARKET REPORT
EIGHTH EDITION

UK private acute healthcare sector market value reaches £11.4 billion as real-term growth return to levels seen pre-pandemic

The eighth edition of LaingBuisson's Private Acute Healthcare UK market report is vital reading for anyone involved in this highly competitive sector of the UK health economy, be they providers, investors, policy-makers or advisors.

Alongside hospitals, our latest report is expanded to include independent clinics. LaingBuisson has reviewed over 3,500 CQC-registered clinics to identify their primary specialism and develop a clear standalone market value for the independent clinic sector.

In total, the overall independent private acute healthcare market value is estimated at £11.4 billion. This includes independent hospitals, independent clinics and NHS PPUs. The overall market value remains well above pre-2020 levels – although there is also evidence that growth has slowed in the last year.

As always, LaingBuisson's report delves deeper into the detail and shines a light on the critical questions fundamental to understanding a complex market with multiple actors and interlocking revenue streams. Has there been a sustained boom in self-pay revenues or has it reached a new ceiling? Which NHS PPUs begun to compete again for a share of the independent market revenues? Which specialisms are benefitting from policy drivers to make more use of the independent sector, and is it driving a shift to day-case and clinic environments? Where is investor interest focused in the sector? What new capacity are operators bringing to the market?

Increasing investor appetite for healthcare assets reflects renewed confidence in the sector based on compelling fundamentals. Major clinic groups have benefitted from private equity backed expansion, particularly in ophthalmology and diagnostics, while the hospital sector has seen a flurry of activity in recent months – with Centene's sale of Circle to PureHealth, and One Healthcare acquired by Phoenix Hospital Group

NHS waiting lists remain high and workforce remains in short supply placing real pressures on the NHS and creating drivers into the independent sector. However, economic slowdown, inflationary pressure, and supply shocks make future profitability hard to predict. This important report provides a crucial update on the current position of the market and its key emerging trends.

What the report covers

UK hospital and clinics overview
Overall market value, and market value for key market segments
Market structure
Activity volumes, capacity and demand measures
Funding PMI, NHS purchasing, Self-pay, NHS private patients
Other market components
National and regional breakdowns
Provider activity, revenues and new capacity
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Who does the report deliver value to?

- Hospital & clinic C-suite professionals
- Specialist acute medical care providers
- Private Medical Insurance groups
- Clinical Commissioning Groups
- NHS Foundation Trusts
- Central and local government
- Investors
- Banks
- Private equity
- Management consultants
- Think tanks
- Lawyers
- Property developers and consultants
- Suppliers to healthcare providers

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