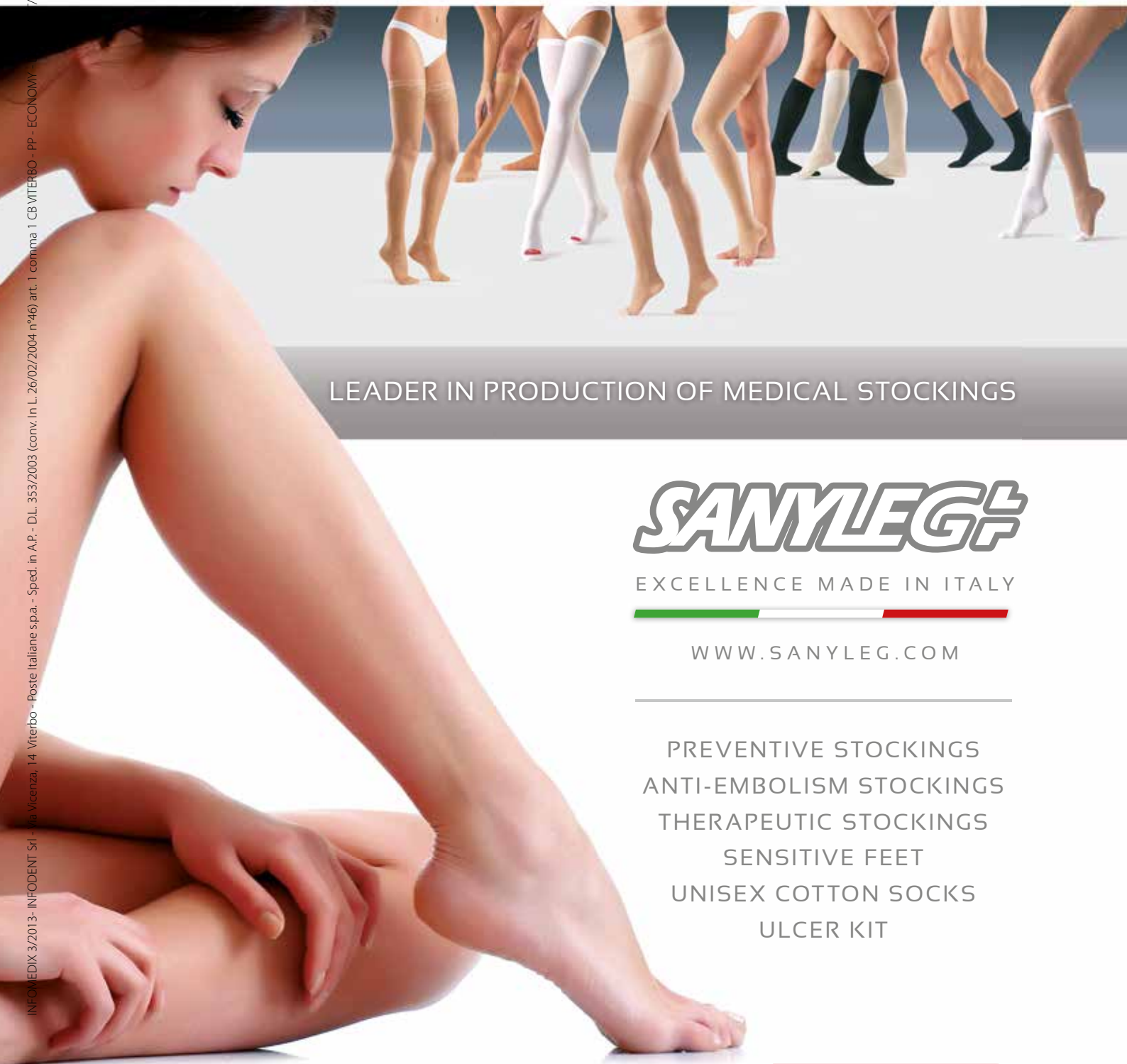


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Outlook on Russia

"At first glance, Russia's economy looks strong. In 2012, when the global economy was losing momentum and the Eurozone was stuck in recession, growth in Russia was solid, based on resilient domestic consumption. The pace of economic growth in Russia was faster than in Brazil, South Korea, and Turkey, something that was unconceivable only two years ago..."

26-34



Sub-Saharan Africa Builds Momentum in Multi-speed World

"Sub-Saharan Africa is now the second fastest-growing region in the world, trailing only emerging Asia. However, growth patterns vary within the region. Strong economic activity in oil-exporting and low-income countries more than compensates for a significant slowdown in middle-income countries largely reflecting problems in the euro area, but also local factors in a number of cases—and adverse effects from civil unrest in some fragile states..."

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Global Wealth Distribution

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The 70th China International Medical Equipment Fair (CMEF Autumn 2013)

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22 – 24 October 2013 • Astana, Kazakhstan



Public Health
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22 – 25 October 2013 • Kyiv, Ukraine



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International Dental Exhibition
29 October – 31 October • St. Petersburg, Russia



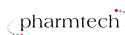
BIHE
19th International Healthcare Exhibition
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Stomatology Azerbaijan
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Beauty Azerbaijan
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31 October – 2 November 2013 • Baku, Azerbaijan



Pharmtech
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TIHE
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Stomatology Uzbekistan
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9 – 11 April 2014 • Tashkent, Uzbekistan



Apteka Expo Central Asia
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9 – 11 April 2014 • Tashkent, Uzbekistan



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15 – 18 April 2014 • Moscow, Russia



KIHE
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Stomatology
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20 – 22 May 2014 • St. Petersburg, Russia



Medsib. SibDent
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20 – 22 May 2014 • Novosibirsk, Russia



Medima
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28 – 30 May 2014 • Krasnodar, Russia



Dentima
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28 – 30 May 2014 • Krasnodar, Russia



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- Designation of the medical device

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Focus on Turkey

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The Blue Mosque, (Sultanahmet Camii), Istanbul, Turkey.
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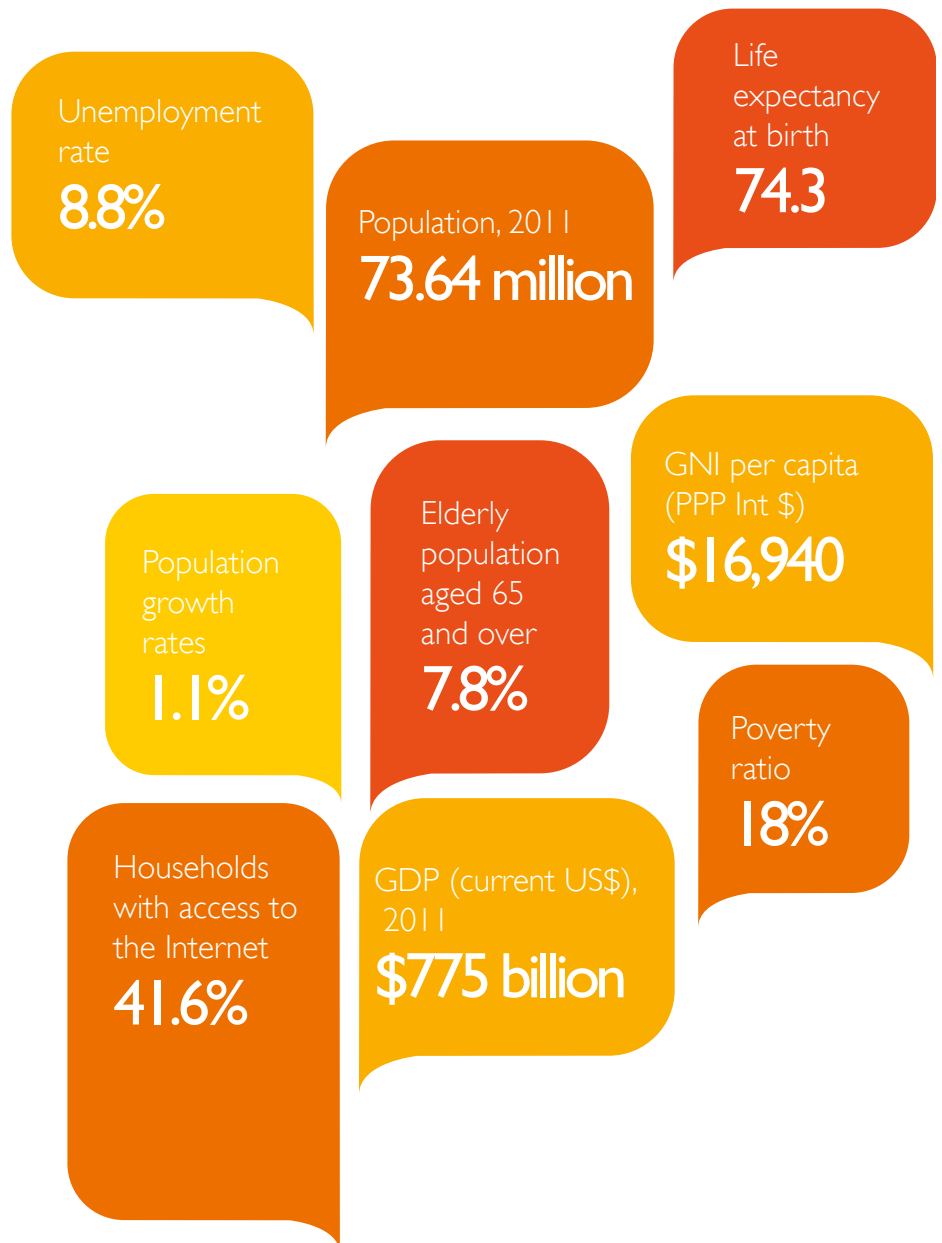
Turkey is located in the Anatolian peninsula, between south-eastern Europe and southwestern Asia, bordering with Armenia, Azerbaijan, Bulgaria, Georgia, Greece, Iran, Iraq, Syria, the Mediterranean Sea and the Black Sea. The geographic position has enabled Turkey, in ancient times known as "Asia Minor", to play a centuries-long bridging role between Europe and Asia, making it a country full of sharp but fascinating contrasts.

Although slowly moving towards joining the EU, Turkey is considered neither as completely European nor as fully Middle Eastern, representing a unique historical crossroads of civilizations.

Demographics – According to the Turkish Statistical Institute, Turkey has a population of **74 million, projected to grow up to 94.6 million in 2050**. Although the growth rate remains slightly positive (1% annually), declining birth rates and improving health conditions are expected to impact on the aging trend.

70% of Turkish population live in urban centres. The most densely populated areas are **Istanbul**, with its 13 million inhabitants, followed by **Ankara**, the capital (4.4 million) and **Izmir** (3.4 million). Other important cities are Bursa (1.9 million), Adana (1.6 million), Gaziantep (1.3 million), Konya and Antalya (both 1 million).

General figures



Sources: OECD/World Bank



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Turkey is a secular State, although nearly 98% of the population is Muslim, mostly defined as moderate or "light". After several decades of government policies aimed at secularism, in recent years several laws were introduced, that arouse fears among some groups of Turkish citizens that the government may be trying to modify this model in favour of a more Islamic-oriented legislation.

Economy – During the last decade, Turkish economy saw impressive growth rates and transformations. Just to mention some figures, inflation dropped from 30% to 6.6%, exports rose from US\$36.2 billion a year to US\$153 billion. Per capita GDP similarly increased from US\$3,492 to above US\$10,000.

In 2010-2011 real GDP growth averaged 9%, but it slowed down to 2% in 2012, and it is forecasted at about 3-4% in 2013. **It is however remarkable that in the period 2002-2012 real GDP rose by 64% and per capita GDP by 43%.** A comparison with economic figures from the past decades shows the transformations occurred in Turkey's economic environment.

The country's economic basics are quite solid, with gross public debt at just 36% of GDP, low household and corporate debt, a good record of job creation, strong banks and large foreign-currency reserves. However, the current picture is not all rosy. According to the OECD's "Economic Survey of Turkey 2012", following the global economic slowdown **some vulnerabilities have emerged, particularly the excessive dependance on foreign confidence and capital inflows.** Moreover, there is a question of sustainability of the growth achieved so far, as it created **large current account deficits** (expected at 6% of GDP in 2013).

Turkey's economy in figures

	1980	2001	2010
GDP (billion \$)	70	509	735
Per capita GDP (USD)	1,500	2,906	9,977
Number of enterprises	90,000	723,503	1,325,749
Exports (USD billion)	3	31	114
Exports per worker (USD)	65	1,456	5,040
Industry share in exports	10%	92%	92%
Number of exporters	1,000	25,000	50,350
Tourism revenue (billion \$)	0.3	8	21
Ranking in the world (in terms of GDP)	25th	21st	17th
Urbanization rate	44%	65%	70%

Source: Foreign Economic Relations Board (DEIK)

Domestic political unrest, recession in the euro zone (still Turkey's biggest export market) and turmoil in Syria and in the surrounding region may affect the inflow of foreign capital, which is actually very needed due to the low rate of domestic savings. As regards the internal issues, population growth combined with unemployment arise some concerns for the country's productivity and competitiveness. These trends combine negatively with **the relevant role of the informal sector** in business and job creation.

The labour market is defined by several observers as overregulated and in need of reforms to allow more employment in the formal sector. Besides wide-reaching labour market reforms, there is also a pressing need to increase the skilled and qualified labour force. The education system, although it has an extensive coverage, presents deep inequalities based on both wealth and geographic location, with eastern and rural regions less provided with sufficient educational infrastructure.

Trade – Despite Turkey is often cited as one of the best-performing emerging economies in the world, its growth has become unbalanced because of the boom of domestic demand, that made imports outpace exports in the last two years. The OECD reports that following the increased integration with the European and international markets, Turkey's share in global exports grew rapidly at first, to decline in recent years. The current export growth rate for goods and services is lower than in other emerging economies such as Brazil, Korea, China and Russia in 2012 and 2013.

According to a study by the Centre for European Policy Studies (CEPS), in order to reverse the trend, the government aims to increase the export volume from \$340 billion in 2011 to \$500 billion in 2023. The goal seems too ambitious considering the average export growth rates over the last decade. **Particularly after 2000, Turkish exports were mainly driven by goods rather than services.** While most of Turkish services exports are in tourism, travel and construction, exports of high value-added services such as ICT, financial, business and legal services, that depend on high rates of tertiary education and skilled human capital, remain comparatively low.

The manufacturing industry accounts for about 80% of total exports, but it largely depends on imported intermediary goods (about 40%). These imports also play an important role towards the domestic market, which in the last decade has attracted the largest share of industrial production. The government is trying to decrease the dependency on imported intermediate goods for most competitive export sectors, in order to tackle current account deficit mostly caused by trade imbalances.

Outlook on the health care system

General health figures

Physicians	126,029
Physicians per 10,000 population (2011)	17.1
Nurses per 10,000 population (2011)	24
Hospitals	1,410
Outpatient institutions	26,544
Per capita total expenditure on health, current US\$ (2011)	\$696
Health expenditure as share of GDP (2011)	6.7%

Balloons in Cappadocia, Turkey

Galya Andrushko / shutterstock

Healthcare facilities

Type of facility	Public	Private	Density (per 100,000)
Health post	6,305	1,213	8.4
Health centre	169	34	0.27
Provincial hospital	519	405	1.2
Regional hospital	198	39	0.3

Source: WHO

According to OECD figures, since 2003 Turkey has been extending public coverage for health services, now accounting for 73% of total health spending - equal to the EU average.

The 2003-2013 Health Transformation Program (HTP) - The ten-years program of reforms was launched in 2003 with the aim of improving governance, quality and efficiency of the healthcare system and expanding access to health services. Until the Program was introduced, the three main sources of health care financing were the state, social security institutions and out-of-pocket payment.

Three organisations provided health insurance: the **Sosyal Sigortalar Kurumu (SSK)** for blue and white-collar workers in the public and private sectors, **Bag-Kur or the Social Security Organization** for Artisans and the Self-Employed and **Emekli Sandigi or the Government Employees Retirement Fund (GERF)**.

In 2006, the government merged them to create a single universal scheme known as **"Social Security Institution" (SSI)**. Under the new Law, all Turkish citizens are required to contribute to the social insurance system. Households with income under a certain threshold are entitled to get contributions paid by the State under the "Green Card" scheme, which includes outpatient benefits and drugs.

On general terms, some benefits achieved so far by the implementation of the program include:

- Reduction of morbidity and mortality rates
- Improved demographics indicators
- Higher awareness on healthcare and lifestyle
- Increased investment in the health sector, supported by foreign capitals
- Quantitative and qualitative improvements in health-care resources (facilities, beds, equipment, health professionals)
- Progressive harmonization with EU regulations and new R&D legislation favouring investments

However, some critical issues remain unsolved:

- Low per capita expenditure on health compared to more developed countries
- Local regulations on patents and intellectual properties not yet harmonized with international regulations
- Relevant dependance on imports in the high-tech medical device sector
- Price control and reimbursement issues may affect foreign investors interest

According to the "Turkey Health System Performance Assessment 2011", that measured the results of the first 7 years of the HTP, the steady **improvement of life expectancy** at birth and life expectancy at age 65 has narrowed the gap between Turkey and rest of the European region.

Another positive result was the high coverage reached by the national **immunization programme** of infants and children, both at national and provincial levels. Nevertheless, one of the main problems of the country's health profile remain the **regional disparities and inequalities in coverage rate** according to income, educational level and between rural and urban areas.

The HTP included interventions on several fundamental aspects of Turkey's healthcare system:

1. Strengthening primary healthcare (PHC), particularly through the implementation of family medicine. Under this scheme, each individual is assigned to a named family doctor. Currently there are 6,367 family health centres across the country.

2. Increasing the satisfaction and productivity of health workers, thus addressing the issue of the low numbers of health workers with both financial and non-financial incentives, and investing to increase the number of new graduates.

3. Increasing the share of government expenditure allocated on healthcare, from 8% in 2000 to almost 13% in 2008 (50% increase over almost a decade), to bring it in line with spending levels of other OECD and EU countries. In particular, budget allocation for disease prevention programmes and PHC has increased from US\$7-9 per capita between 2000 and 2003 to US\$42 per capita in 2010.

4. Consolidating the various social health insurance schemes into a single scheme managed by the SSI. The Social Security Law guarantees to all beneficiaries the same benefits package (access to public and private sector doctors, outpatient benefits and drugs).

Some figures show that the reform was effective in increasing both scope and depth of healthcare coverage:

- The population covered by some form of social security increased from 84% in 2000 to 98% in 2010.
- Referral rate from PHC to other levels of care dropped from 16.7% in 2002 to 0.4% in 2010.
- The proportion of primary-care visits has risen from 6 to 7 visits per 10 hospital visits between 2006 and 2009.
- The number of health workers per population increased for all professional categories except pharmacists and dentists. In particular, among 30 OECD countries, Turkey showed one of the highest increases in nurse and physician density between 2000 and 2006.

However, concerning the latter point, it must be noticed that the rates of nurses and midwife physicians per inhabitants remain considerably lower than the European average. Moreover, **specialized professionals are concentrated in the western Anatolia and Istanbul areas**, while the north-eastern, south-eastern and mid-eastern Anatolia regions are underserved. For instance, Istanbul alone concentrates about one-third of the over 126,000 medical doctors in Turkey. On the other hand, other types of health-care workers show more even distribution rates throughout the country.

The private healthcare sector – The Turkish Foreign Economic Relations Board (DEIK) reports that private investors have been highly active in the health sector since early 1990s, and in the last years an increasing number of foreign investors has stepped into the market as well. Currently, there are 10 international investment funds and groups holding interest in Turkish hospitals and clinics.

The development of private hospitals, clinics, and health centers has been particularly relevant for plastic and cosmetics surgery, orthopedics and ophthalmology. Especially during the last decade, the growth of the private health sector has become apparent through the change in the distribution of hospitals and beds between public and private providers. Currently, roughly 60% of beds are public and 40% are private.

The number of private doctors has increased as well. Considering the figures for 2000-2009 made available by DEIK, it is worth noticing how the number of private doctors has increased more than five-fold, while that of public-employed doctors has increased three-fold. In both sectors, however, the greatest increase was registered in the period 2005-2009.

Number of Doctors in Turkey (2000-2009)

	MoH	Medical Schools	Private	Total
2000	17.665	7.204	4.226	29.085
2005	22.893	9.801	5.542	38.236
2009	63,622	25,015	22,574	111,211

Source: DEIK (Foreign Economic Relations Board)

The market for medical devices

Market size – Turkey's medical market was valued at US\$2.26 billion in 2012, ranking within the top 30 largest medical markets in the world. The International Society for Pharmaeconomics and Outcomes Research estimates that the total market size will reach US\$3 billion by 2015, making it a very attractive market for medical device manufacturers.

According to Espicom analysis, imports account for about 85% of the medical devices and products supplied in the Turkish market. Although the import share has been increasing by average 6% in the period 2007-2011, in 2012 total medical import value decreased by 6% on the previous year, to US\$1,88 billion. Only the dental sector registered a different trend with positive growth of import values.

Size of the medical devices market in Turkey (millions of US\$)

	2010	2011	2012
Total Market Size	2,000	2,100	2,260
Total Local Production	200	210	226
Total Exports	200	220	240
Total Imports	1,800	1,880	2,034

Source: Medical Device Manufacturing

The USA, Germany and China together account from half of the imported medical supplies.

Growth factors – Despite the current economic constraints and surrounding financial turmoils, the medical device market in Turkey is expected to benefit from the expansion of healthcare facilities and rising health expenditure, which made analysts forecast an optimistic 8 to 9% average growth rate in the next four years.

According to the Investment Support and Promotion Agency of Turkey, the introduction of universal healthcare insurance scheme is impacting positively on the medical market, resulting in growing health awareness and the possibility to access a broader scope of health services.

Other factors to be considered as relevant for the long-term potential of the Turkish medical market are:

- growing population and increasing share of elderly population
- high incidence of chronic diseases
- higher life expectancy
- increased average annual income

These trends account well for the interest of foreign companies in the Turkish medical market. On its side, the Turkish government has encouraged foreign investments through several incentives in R&D legislation, simplification of procedures and transfer of shares of incorporation companies, and more freedom in choosing the resolution systems for commercial disputes. Added to the already existing favourable conditions allowing repatriation of profits, acquisition of immovable property or rights in Turkey and full ownership of a Turkish subsidiary, these measures have undoubtedly been effective. Several overseas medical companies (including large multinationals such as General Electric, 3M, P&G, Pfizer, Johnson and Johnson) have established production bases in Turkey both to manufacture products for the growing domestic market and to benefit from its role as main trade hub in the region, to export to countries in Central Asia, the Caucasus and the Middle East.

Maiden Tower and the Old City Silhouette in Istanbul Turkey
nexus 7 / shutterstock



Turkish medical devices and supplies exports by Products (US\$ million)

Products	2007	2008	2009	2010	2011
Instruments and appliances used in medical, surgical, dental or veterinary sciences	66.78	69.55	63.72	77.20	106.27
Mechano-therapy appliances; massage apparatus; psychological aptitude-testing apparatus;	7.48	9.24	10.26	10.36	14.72
Other breathing appliances and gas masks	0.56	1.45	0.71	0.75	1.24
Orthopedic appliances, surgical belts and trusses; splints and other fracture appliances; artificial parts of the body; hearing aids and other appliances	24.93	32.77	37.45	44.02	53.58
Apparatus based on the use of X-rays or of alpha, beta or gamma radiations, X-ray tubes and other X-ray generators	3.91	4.33	4.98	6.09	6.46
Total	103.68	117.36	117.14	138.44	182.29

Source: Ministry of Economy

Local industry - The Turkish medical devices and supplies industry is a fast developing sector that changed significantly over the last decade. The scope of local production, the number of manufacturers and also the general quality of the products have all increased. According to the Ministry of Economy, the industry comprises about **6,000 companies**, including 450 medium and large-scaled companies, 100 manufacturers/exporters, and 2,500 suppliers. Most of the companies are located in **Istanbul, Ankara, Izmir and Samsun**, due to the concentration of health institutions, transportation and telecommunication facilities in these cities, as well as easier supply and access to research and technical support. The products range goes from simple disposables such as wadding, gauze, bandages, syringes, needle and catheters, to more sophisticated equipment including medical and surgical instruments and appliances, ophthalmic instruments, dental instruments, laboratory diagnostics, wound closure equipments, etc. Turkish medical manufacturers comply with international standards such as the GMP (Good Manufacturing Practices), GHP (Good Health Practices), ISO standards and CE mark.

Turkish medical production fulfills domestic demand for some products, but a relevant share goes to export markets. **Medical exports were valued approximately US\$182.3 million in 2011**, registering 31.7% increase on 2010 (US\$138.4 million), and 75.9% increase on 2007 (US\$103.6 million). A closer look at the **composition of Turkish medical exports** in 2011 (the latest year for which detailed figures are officially released) shows the different weight of the three main export categories:

1. Medical, surgical, dental or veterinary instruments and appliances US\$106.3 million
2. Orthopedic appliances, splints and other fracture appliances and hearing aids US \$53.6 million
3. Mechano-therapy appliances US \$ 14.7 million

Among the 100 export markets, the major are Germany, France, Azerbaijan, Iraq, Somali, China, Iran, the Turkish Republic of Northern Cyprus, USA, UK, Italy, the Netherlands and Pakistan.

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Outlook on Russia

Author: Lara Pippucci

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Russia is the biggest country in the world. It occupies 11.5% of the world territory and its area is equal to 17 mln sq. km, which is somewhat larger, for instance, than the area of Canada - the second largest country in the world (9.97 mln sq. km), and that of Australia (about 7.68 mln sq. km).

The territory of Russia spreads for ten thousand kilometers from the Baltic Sea in the west to the Sea of Japan in the east. Spanning eleven time zones, Russia is the largest country on earth in terms of surface area, although large tracts in the north and east are inhospitable and sparsely populated.

There are 89 subdivisions in the Russian Federation, 21 republics, 46 oblasts or provinces, 9 krais or territories, 1 autonomous oblast or province, 4 autonomous okrugs or districts and 2 federal cities.

The Russian federation counts more than one thousand cities and towns. The largest cities with more than one million inhabitants are: Moscow (more than 9 million people), St. Petersburg (about 4.7 million people), Nizhniy Novgorod, Novosibirsk, Yekaterinburg, Samara, Omsk, Tseliabinsk, Kazan, Perm, Ufa, Rostov-on-Don, Volgograd.

Russia is a Democratic Federative Republic with a presidential government and two-chamber Federal Assembly (parliament) consisting of the State Duma and the Federation Council. The head of state is elected once in four years. In 2000 Vladimir Putin was elected the President of the Russian Federation and on March 14th, 2004 he was reelected for the second term.

Russia emerged from a decade of post-Soviet economic and political turmoil to reassert itself as a world power. Income from vast natural resources, above all oil and gas, have helped Russia overcome the economic collapse of 1998. The state-run gas monopoly Gazprom is the world's largest producer and exporter, and supplies a growing share of Europe's needs.

Economy

At first glance, Russia's economy looks strong. In 2012, when the global economy was losing momentum and the Eurozone was stuck in recession, growth in Russia was solid, based on resilient domestic consumption. The pace of economic growth in Russia was faster than in Brazil, South Korea, and Turkey, something that was unconceivable only two years ago.

Achievements were not limited only to economic growth:

- In 2012, the current account was strong thanks to a large surplus in the trade balance.
- Capital outflows declined, allowing the Central Bank of Russia (CBR) to add again to its stock of reserves.
- The budget was balanced, and the Government started to replenish its reserve funds that were depleted by the crisis. While average public debt in advanced economies exceeds 110 percent of GDP, Russia's public debt is no more than 10 percent of GDP.
- Unemployment dropped to 5.4 percent in January 2013, a record low for the last two decades, and wages grew at a solid pace.
- Low unemployment, a growth in wages, and a reduction in inflation are set to reduce the number of poor people from 16.9 million in 2012 to 15.9 million in 2014.

However, a closer look reveals weaknesses:

- Economic growth dropped to half the level of the decade up to the 2008 crisis. Industrial output declined in early 2013 for the first time since 2009.



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- Fixed investment remains dependent on public funds, and foreign direct investment is subdued. Inflation increased in the second half of 2012 and is set to remain stubbornly high in early 2013, weighing on consumption.
- Russia is also stagnating in global economic rankings. Measuring the size of the economy in current U.S. dollars, Russia did improve globally from 18th to 8th position between 2000 and 2008, but it remained in this position in 2012.

Russia's economy grew 3.4 percent in 2012, down from 4.3 percent in 2011. Growth will continue slowing further to 3.3 percent in 2013, and then is set up to pick up modestly to 3.6 percent in 2014. The weak external environment, elevated inflation, flat oil prices, and sluggish domestic demand could postpone a pickup in growth in Russia toward the second half of 2013.

Growth declined mainly due to the weaker performance of investment. Inventories were flat as the restocking cycle after the crisis came to an end, and fixed investment expanded only moderately as business remained cautious about future prospects. In part due to high investment spending in late 2011, the contribution of investment to growth declined throughout the year. In contrast, consumption growth remained almost as strong as in 2011, thanks to low unemployment, wage increases, credit expansion, and government spending. As a result, consumption became the main growth driver instead of investment. Finally, the weak investment dynamics dampened import growth. This translated into a lower negative contribution of net exports to growth in spite of weak external demand due to the recession in the European Union (EU).

Inflation continues to be high. Headline year-on-year inflation reached 7.1 percent in January 2013, compared to 4.2 percent in January 2012. The increase in inflation in Russia is striking from an international perspective and is related to three factors. Firstly, it reflects the increase in food inflation triggered by the drought in Russia and among international grain producers, as well as higher excise taxes on alcohol. For example, year-on-year food inflation increased from 1.2 percent in April 2012 to 8.6 percent in January 2013. Secondly, the rise in administrative prices in July and September 2012 and January 2013 pushed up services inflation. As a result, year-on-year services inflation increased from 3.8 percent in June 2012 to 7.8 percent in January 2013. Finally, there was some uptick in core inflation, which excludes food and gasoline. It increased from 5.1 percent in May 2012 to 5.8 percent in October 2012, and then stabilized at roughly 5.7 percent in recent months.

By 2014, growth in Russia is set to be once again lower than in Brazil, South Korea, and Turkey. In order to revive and modernize the economy and reduce its dependence on natural resources, policy makers face two challenges. Firstly, Russia has to manage macroeconomic policies so as to ensure economic stability in the face of domestic and external vulnerabilities. This implies three policy priorities: sticking with prudent spending plans and saving oil revenues that come in over and above budget; focusing monetary policy on low inflation to keep inflationary expectations in check; and strengthening banking supervision and taking additional measures to mitigate emerging risks in consumer lending.

Russia has to step up structural reforms in order to lift its growth potential. Reviving growth requires, among other things, reducing the state's footprint on the economy and improving the investment climate; confronting the challenges of an aging and shrinking population; and strengthening governance through more transparency, better regulations, and more effective control of corruption.

The Russian Healthcare System

In the Russian Federation, provision for healthcare is one of the primary social functions of the state; covering delivery of medical care, prevention of disease, and improvement of the population's health.

After the February and October revolutions of 1917, the main feature of Russian healthcare was the creation of a comprehensive state medical treatment and prevention system. Inherited from the Soviet Union, the Russian Federation was faced with a legacy of guarantees for a wide range of social services, including citizens' right to free medical services. The guarantee of a full range of free healthcare services has not changed with the dissolution of the former system, but rather has been confirmed through the new Russian Constitution and the new healthcare financing law.

Until the late 1980s, the structure of health services in the Soviet Union was highly centralised. After the dissolution, the healthcare system followed the new decentralised administrative structure of the country and it is now divided into federal, regional (oblast-level) and municipal (rayon-level) administrative levels. 30% of the population receive primary care through work related clinics and hospitals. For certain employment groups such as police, railroad workers, and high-level government officials, special health services exist.

At the end of the 20th century, the collapse of the Soviet Union and ensuing radical changes in the country's social and economic policy engendered healthcare problems and systemic challenges, many of which are yet to be addressed. Starting in 1998, the Russian Federation Government has been implementing an annual program that provides guaranteed free medical care to Russian citizens, funded by the state budget.

National Project "Health"

In 2006 a national project named 'Health' was launched to improve the country's healthcare system through improved funding and health-care infrastructure. This plan helped provide hospitals and clinics with advanced, high-end equipment and ambulance systems, build new medical centers, as well as launch nation-wide vaccination programs and free health checks. The project has also been working on developing medical technology market through initiatives to blend healthcare and information technology. One of the focuses was made on salary increase of medical staff working in the primary care as well as their wider training programmes.

The project was initiated by the Russian President Vladimir Putin and coordinated by the President Office. It was mostly financed by the federal budget. However regional and municipal levels have also contributed significantly to financing the programme, whose budget 78,98 billion RUR in 2006 and 346,3 billion RUR in 2007-2009.

In general the Health project received very positive remarks in the society. The industry has benefited from the government's 'National Health Program', which provides substantial funds to build 15 specialized health centers in the country. This higher purchasing power of hospitals and active government support has also assisted the medical devices market. However some experts wrote that, taking into consideration the level of financing, better results especially in the field of primary care development could be reached.

Healthcare Development Concept 2020

The new legislation goes beyond the traditional focus on health-care delivery to include a concern about population health. It sets out the

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goals of reducing mortality in working ages, especially by lowering rates of injuries and alcohol poisoning, as well as reducing infant and maternal mortality. It also highlights the need for effective action against "socially determined conditions" such as drug addictions, smoking, hazardous drinking, sexually transmitted diseases, tuberculosis and AIDS.

The Russian government put emphasis on high technology, greater primary care, reduction of hospital capacity, improvement of management, introduction of new systems of payment for facilities and individual providers of services, construction of cardiology centers and transition to insurance-based healthcare.

The major priorities for reform include:

- closing the gap between formal commitments to the population and available resources;
- shifting the structure of provision towards greater reliance on integrated primary care;
- adopting payment schemes in the healthcare sector that encourage more cost-effective therapeutic choices;
- modernizing the system of mandatory medical insurance.

The objectives of the concept are:

- population growth up to 145 million people
- increase of life expectancy to 75 years
- decrease of infant mortality to 7,5 per 1000 born (20% decrease compared to 2007)
- decrease of maternal mortality to 18.6 per 100 000 born (15.7% decrease compared to 2007)
- formation of healthy lifestyle, incl. curtailment of tobacco and alcohol demand
- improvement of quality and accessibility of healthcare services, guaranteed to the population of the Russian Federation

The goals of the concept are:

- Creation of conditions, possibilities and motivation of population for healthy lifestyle
- Development of the healthcare system
- Specification of state guarantees of free medical services provision to the population
- Improvement of pharmaceutical supply at the outpatient departments within the frames of the OMS system
- Creation of an effective management model of financial resources of the state guarantee programme
- Further training of medical staff and creation of motivation system for quality work
- Development of medical science and innovations in the healthcare sector
- IT development in healthcare

One the most interesting statements in this framework is the ambition of the government to increase the size of insurance premiums to the Mandatory medical insurance system (OMS) both for the working and the non-working population as well as transfer to a single channel financing model (via OMS). Then tariffs for the medical care should include all expense items connected with maintenance of activity of corresponding healthcare facilities.

Even if Russia has instituted a comprehensive reform of its healthcare system and healthcare is "Priority #1" in the government's new national priority projects, it is currently estimated that only 20% of the Russian population of 142 million has access to quality healthcare. The majority of hospitals and polyclinics are public and belong to federal, regional or local governments.

At the moment, the two major sources of public healthcare funding - mandatory insurance funds (30%) and spending supported by federal and regional budgets (70%) - do not cover all healthcare expenses.

As a result, a significant portion of overall (public and private) health care spending (about 20%) is covered out of patients' pockets. Voluntary healthcare insurance programs account for approximately one-third of the total private healthcare expenditures. According to long-term reform plans, mandatory insurance funds will serve as the main source of healthcare funding, providing transparency and control over cash flow within the system. However, despite the ongoing healthcare reforms and significant increases in federal and regional budget allocations for healthcare, financing remains insufficient to address the needs of the sector.

Russian medical equipment and supplies market

The Russian medical equipment and supplies market is one of the fastest growing sectors of the economy. According to the estimates of the Russian Ministry of Industry and Trade, Russian medical devices market will be gradually increasing by around 13% annually till 2020.

In 2012, the Russian market for medical equipment and supplies is estimated at US\$5,455.7 million. Per capita spending stands at US\$39; per capita expenditure is low by western standards, but is in line with that found in other ex-Communist states such as Belarus or Bulgaria. A relevant share of the manufacturing sector is composed by small and undercapitalized companies whose medical device production is competitive at the price level but not focused on quality. The country has a strong scientific research base but relatively less experience in commercializing new products. Exports are low and centered on other former USSR markets.

Almost two-thirds of the medical equipment and devices used in public clinics and hospitals are obsolete and need replacement. Russia itself does not produce much high-end medical equipment and relies almost exclusively on imports for more sophisticated products

The Federal Service on Surveillance in Healthcare and Social Development of the Russian Federation (Rosdravnadzor) has approved over 20,000 medical products and devices for use in treatments, 60% of which are locally manufactured (appliances - 3,000 equipment - 1,000, instruments - 7,000 glass and polymer medical products - 700). About 1,200 Russian enterprises, 90% privately held, manufacture an array of medical devices, including apparatus and appliances (45%), medical instruments 10%, medical equipment (9%), glass and polymer medical products (10%), other medical products (26%).

According to various sources, imported medical devices constitute 60% of the Russian market. The statistical data show that 40-45% of imports come from Germany, 20-25% from the U.S., 10% from Japan and 5% each from Italy and France. For the last three years, a growing number of cheap analogues from China and Pakistan have entered the Russian market in large volumes.

Russian medical equipment manufacturers are making some progress in several traditional and developing segments. First, most routine X-ray diagnostic procedures are done on Russian-made equipment. Apart from that, the Russian medical device market is well represented by monitors for various uses, including those for intensive therapy, surgical operations, pregnancy and at the patient's bedside. Also, Russian companies manufacture certain models of electrocardiographs, encephalographs and rheographs.

Russia

Full Name: Russian Federation



... International Market & Trends

Россия

Overview

Currency: Russian rubles (RUB)

Major language: Russian

Major religions: Christianity, Islam

Monetary unit: 1 rouble = 100 kopecks

IMF Categorisation: Emerging/Developing

Main Export Partners:

- Netherlands 12%, • China 6%, • Italy 6% (2011)

Main Import Partner:

- China 16%, • Germany 10%, • Ukraine 7% (2011)

Main Exports: Petroleum and petroleum products, natural gas, metals, chemicals, weapons and military equipment

Main Imports: Machinery, Vehicles,

Pharmaceutical products chemicals

Source: Cia World Factbook 2013

- **Population of Russia:** 142.8 million (UN, 2011)

- **Population growth rate:** 0.01% (2012 est.)

Birth rate: 12.3 births/1,000 population (2012 est.)

Death rate: 14.1 deaths/1,000 population (July 2012 est.)

- **Structure of Russian population:**

0-14 years: 15%

15-64 years: 72%

65 years and over: 13% (2012 est.)

- **Median Age:**

Total: 38.8 year

Male: 35.6 years

Female: 42.1 years

- **Life expectancy at birth:**

Male: 63 years

Female: 75 years



A particular focus of Russian manufacturers (usually 15% of the products made at any given plant) is on producing surgical tables, lighting systems, sterilization equipment, cameras for disinfection, beds and medical furniture. The Russian manufacturer KB Vzlet developed the "Kosmea" apparatus used for cardiac artery bypass surgery that works without an artificial blood-circulation apparatus. "Trekpor Technology" Holdings developed an industrial magnetic-resonance accelerator for the production of membranes.

In November 2010, the government developed a strategy that will help the medical device industry to attract investment, create new jobs and produce competitive, safe, good quality and affordable products to fulfil the healthcare system's requirements. Currently, the bulk of high-tech medical equipment comes from abroad. If the objectives of the plan are realised, by 2020, the local industry will be able to meet 50% of the local demand for medical devices.

The Healthcare Modernization Act, initially intended for 2011-2012 and the total cost of which was equal to 630 billion rubles (approximately US\$18.9 billion) will be prolonged till 2013. Up to now, the government hasn't yet implemented the programs that were directed at implantation of the new standards, doctors' salary increase, repair of hospitals and informatization. For 2013 the Ministry of Healthcare will ask additional 50 billion rubles (approximately US\$ 1.5 billion).

The reforms that are implemented by the regions were planned for 2011 and 2012 and financed by Federal Fund of the obligatory medical insurance (it was increased from 3, 1% till 5, and 1% since 2011), territorial funds and subjects. The goal of the programs was to make the Healthcare system in the whole Russia more even. The program included repairing and equipping the medical institutions, medical professionals' salary increase, implantation of the medical assistance standards and informatization. It is necessary to prolong the modernization reform because regardless of the invested capital there is still a lot to do. At the end of the 2012 17% of the institutions needed repair and almost 41% a total equipping. Of the 4,400 institutions 2,600 were repaired and of 9,900 hospitals and clinics that needed new equipment, only 5,500 were re-equipped.

As it was mentioned by the Prime Minister Dmitri Medvedev, one of the main courses of the modernization reform is the development of high-technological medicine and the creation of the scientific base. In 2012 the strategy of medicine development was accepted until 2025. Another important issue in healthcare sector was the increase in life expectancy. Following a demographic program that lasted for 5 years (from 2005 till 2011), the number of birth was increased from 1,000,479 to 1,000,794. The number of deaths has declined by 16.4%: from 2.3 million people to 1.9 million.

Opportunities

Despite recent breakthroughs and the fact that locally made medical equipment is two to four times cheaper than imported equipment, Russian production still lags behind the majority of developed countries.

Thus, Russia is still dependent on imports for a significant number of medical equipment industry sub-sectors, especially those requiring large investments in R&D, innovative technologies and automation.

The best prospects for medical equipment include: Computer tomographs; Blood pressure instruments and equipment; Respirators; Endoscopes; Ultrasound scanning equipment; Syringes, catheters, dental disposables, ophthalmological equipment; X-ray equipment for general medicine, surgery and veterinary; Artificial kidney complex components (oxygenators and dialysis machines).

There is a large number of medical device distributors in Russia. The majority of the distributors are located in Moscow and St. Petersburg and other Russian cultural centers - Samara, Yekaterinburg, Perm, Krasnoyarsk. Distributors commonly receive direct shipments from foreign manufacturers or from their representative office in Russia. Many distributors have their head office in Moscow and representative offices in other regions. Other regional distributors may have direct contract with manufacturers or buy products from a centralized distributor located in Moscow or in St. Petersburg.

Russian dental market

The Russian dental market has an impressive potential too. The number of clinics, practicing dentists, technicians and patient visits is very high and continues to grow. There are 12,400 public and private dental clinics in the country. According to estimates there are more than 85,000 dentists and 10,000 technicians.

51 dental schools over the country are issuing more than 3,000 dentists annually. The number of patient visits is more than 150 million per year. Dental care is provided by 4.5 dentists for every 10,000 people. The estimated turnover of dental services is US\$ 4 Billion (2009). The ratio of municipal and private dental clinics is changing rapidly. If some five years ago, it was 70/30, now it is at 20/80. There is talk of total privatization of dental services in Russia.

These factors make the dentists more independent and focused on improving the quality of services in a competitive struggle for the patient. In the last few years a surge of interest in the latest international developments in the field of dentistry has led to the unprecedented activity of Russian dentists abroad, which affected the attendance of international exhibitions, participation in the most prestigious conferences, joining the international professional associations.

This trend was also reflected in the rapid growth of dental exhibitions in Moscow DENTAL-EXPO and DENTAL SALON, which firmly established among the world's leading exhibitions in dentistry. Today DENTAL-EXPO and DENTAL SALON are not just exhibitions of products for dentists, but those are complex congress and exhibition events, bringing together under one roof more than 300 events for dentists - from a master class to the International Congress and accompanied by major exhibitions, representing more than 500 participants from more than 30 countries worldwide. These events are held as Moscow International Dental Forums in April and September annually. Local regional dental exhibitions are growing actively as well, giving the company perfect marketing possibility throughout the country with biggest territory in the World. The best growth rates are shown in such cities as St.-Petersburg, Samara, Ufa, Krasnoyarsk, Rostov-na-Donu, Volgograd etc.

Source:

"Cia World Factbook 2013" - CIA
 "The Russian Medical Device Market: it is System not Tools that should Alter" by SGS
 "Russian Healthcare System Overview" by the Stockholm Region office in St. Petersburg, June 2010 "Russia Profile" - www.bbc.com
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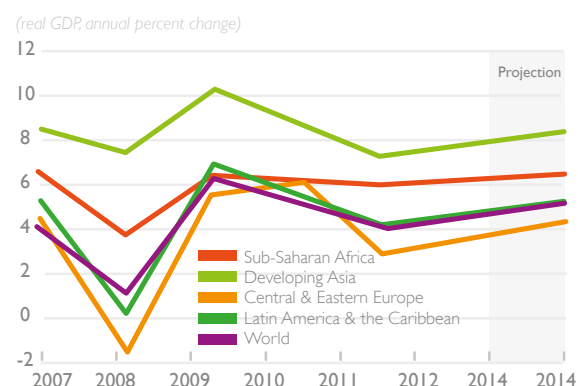
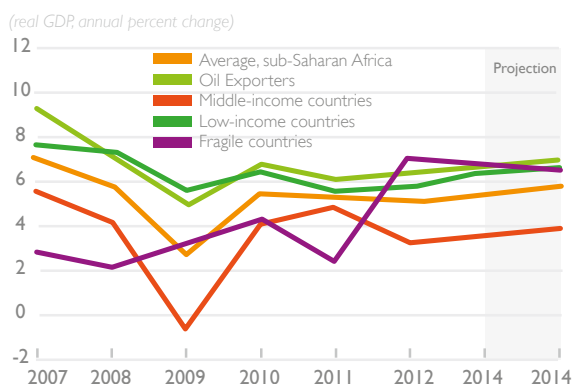
- Continued robust growth in sub-Saharan Africa conditional on policy choices
- Region's economic performance still subject to downside risks
- Rebuilding policy buffers while meeting developmental needs is priority

With a gradually improving outlook for the global economy, growth in sub-Saharan Africa is set to strengthen, according to the IMF's latest forecast for the region.

The near-term outlook for the region is broadly positive because most factors lending support to economic activity in the last few years remain in place—namely strong investment, favorable commodity prices, and generally prudent macroeconomic management.

Chart 1
Faster than most

Growth in sub-Saharan Africa is robust and is set to accelerate moderately in the coming years; the pace of growth in middle-income countries is expected to be slower than in the rest of the region.



Sources: IMF, World Economic Outlook database
Note: Excludes South Sudan

The IMF's Regional Economic Outlook for sub-Saharan Africa projects regional economic growth of 5 ½ percent in 2013–2014, compared with 5 percent in 2012. Investment is expected to remain a key driver of growth, while measured activity in 2013 will also be boosted by one-off factors in some countries, including rebound effects from floods in Nigeria and recovery of agriculture in regions previously affected by drought.

Upper middle-income countries are expected to continue grappling with sluggish growth, while activity should gradually normalize in some fragile economies that were negatively affected by political instability. The region's downtrend in inflation is set to extend into 2013–14. This forecast is premised on moderating nonoil commodity prices, productive local crops, and inflation-focused monetary policy. Gains made in combating inflation in eastern Africa are expected to be consolidated, while the pace of price rises is projected to slow in countries that experienced inflation flare-ups.

Strong growth, slowing inflation

Sub-Saharan Africa is now the second fastest-growing region in the world, trailing only emerging Asia (see Chart 1). However, growth patterns vary within the region. Strong economic activity in oil-exporting and low-income countries more than compensates for a significant slowdown in middle-income countries largely reflecting problems in the euro area, but also local factors in a number of cases—and adverse effects from civil unrest in some fragile states.

After reaching more than 10 percent in 2011, consumer price inflation in sub-Saharan Africa dropped to 7.9 percent at the end of 2012 (see Chart 2). The reduction in inflation, which was particularly marked in eastern Africa, generally reflected good local harvests, well focused monetary policies and, in some cases, the appreciation of local currencies. That said, there were some exceptions to the downward trend in inflation in the region—most notably Malawi, which suffered pass-through effects from currency depreciation.

Downside risks

Growth prospects for the region are subject to downside risks, reflecting both external and domestic factors. On the external front, **although near-term risks for the global outlook have diminished, sizable medium-term risks remain, including the possibility of prolonged near-stagnation in the euro area and a sharp drop in investment in major emerging market economies.**

The Regional Economic Outlook indicates that should these risks materialize, they could temporarily affect sub-Saharan Africa's growth but not derail it. That said, some countries with limited policy buffers or a high exposure to the shock—possibly reflecting a narrow export base—would likely experience more severe effects. Domestic risks include adverse climate developments and internal conflict. These events, though potentially severe in their impact domestically and perhaps on close neighbors, usually do not have significant effects on the region as a whole.

Policy options

The region's positive outlook is conditional on the implementation of sound macroeconomic policies, although there is no one-size-fits-all approach.

- **With the risk of a significant global slowdown still present,** rebuilding buffers to handle adverse external shocks is essential in many fast-growing economies—while preserving key capital and social spending.
- **Large fiscal deficits in some countries point to the need for fiscal adjustment;** but the pace of adjustment should take into consideration the state of the economy.
- **Continued tightness in monetary policy is warranted in countries with high inflation;** in other countries, there could be space for some cautious easing of the policy stance.
- **Surging current account deficits in some low-income and fragile countries,** although largely financed by export-oriented foreign direct investment, require careful monitoring.

Background studies

The Regional Economic Outlook also contains three background studies. The first analyzes the financial positions and ability to finance higher deficits of governments in the region, using a variety of approaches. The study concludes that although most countries in sub-Saharan Africa are not constrained from borrowing by high debt levels, many could find it difficult to raise sufficient financing for larger deficits in the event of a downturn.

The second study takes a look at the recent international sovereign bonds issued by sub-Saharan African countries, which have taken advantage of easy global financial conditions and good economic prospects for the region.

The possibility of issuing sovereign bonds enriches the menu of financing options available to some countries in the region; but making the most of this opportunity requires careful planning and execution, and proper consideration of the government's overall fiscal and debt management strategies. Countries should maintain prudent fiscal policies, compare different financing tools, and follow best practices to ensure the most favorable financing conditions.

Energy subsidies

The third background study takes a look at energy subsidy reform. Many countries in sub-Saharan Africa maintain schemes that, directly or indirectly, subsidize the consumption of energy, particularly fuels. But energy subsidies tend to be costly, crowding out spending on much-needed social and infrastructure projects. Also, although subsidies may in some cases benefit the poor, most accrue to the more affluent segments of the population, making them an ineffective instrument of social protection.

The study documents some cases of successful energy subsidy reform in the region, and distills some lessons of broader applicability. These include the need for careful preparation and sequencing; the key role of strong institutions to support the reform process; and the importance of deploying well targeted social safety nets to offset the impact of the reform on the poor.

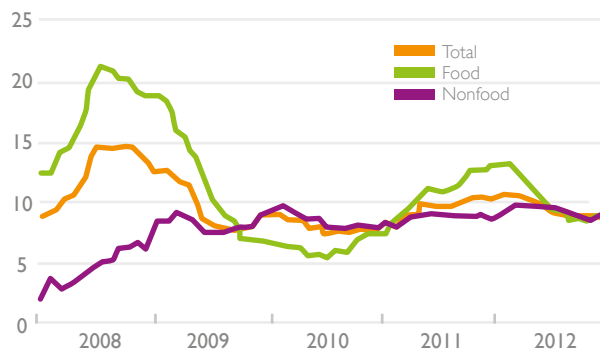
Source:

IMF- International Monetary Fund
Publication: IMF Survey Magazine
Website: www.imf.org

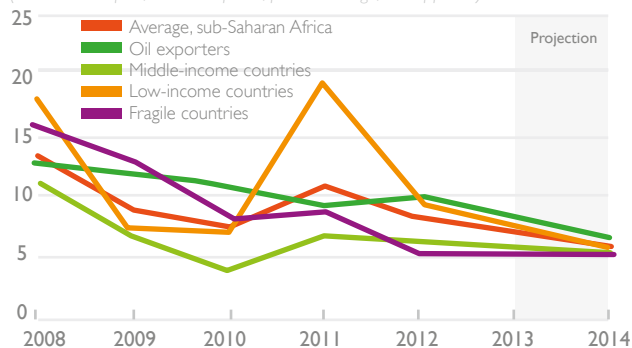
Chart 2 Less Pressure

Sub-Saharan African inflation is expected to further subside in 2013-14, reflecting moderating nonoil commodity prices, productive local harvest, and inflation-focused monetary policy.

Sub-Saharan Africa, consumer prices, 12-month percent change)



(sub-Saharan Africa, consumer prices, percent change, end of period)



Sources: IMF World Economic Outlook database
Note: Excludes South Sudan

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Smarter pricing badly needed

Business outlook for the EU medical device industry

Author: Lara Pippucci

A Simon-Kucher survey reveals that increased competition from smaller, price-aggressive players and procurement pulling from customers are the key commercial challenges facing the European medtech industry in 2013. Smarter price execution and enhanced sales effectiveness will be the key levers to secure companies' market positions.

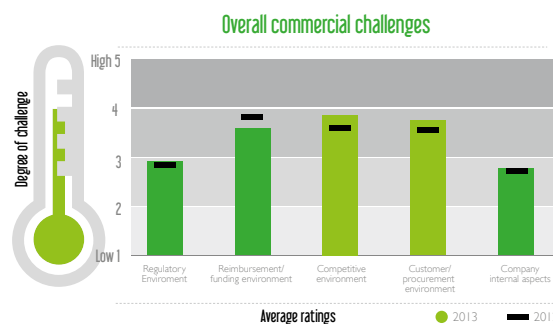
European medtech companies are under pressure. Even though the overall business outlook of the industry is positive for 2013, effective price execution is a major challenge in fighting strong market dynamics. Yet medtech companies don't seem prepared to tackle this challenge. And among others, they will need to develop and implement defensible price structures and value-based pricing strategies. These are the key findings of the *MedTech Barometer 2013**, conducted each year by global strategy and marketing consultancy Simon-Kucher & Partners and presented at the company's annual European Medtech Strategy Forum in Amsterdam. The pricing experts asked over 60 top-level decision makers from the world's leading medical technology companies in all key sub-sectors about the commercial trends and challenges they face. "Due to the limited growth opportunities in Europe, competitors are attacking the most lucrative accounts," explains study author Joerg Kruetten, Executive Vice President and head of Simon-Kucher's global medical technology competence center. "On top of this, centralized procurement continues to put pressure on prices and weakens the bargaining power of the industry even more."

Business outlook: Slowly back to normal

Despite obvious challenges, overall business expectations for the medical technology sector in Europe are positive for 2013: About 40 percent of industry experts believe that 2013 will be a better year than 2012. The same percentage forecasts a stable business outlook; only the remaining 20 percent are pessimistic. Generally speaking, representatives are optimistic that the pace, new business areas and products will partially compensate for the persisting economic downturn. In other words, overall growth targets are in the same (moderate) ballpark as in 2012.

Price pressure makes the market nervous

Price pressure is an ongoing topic in the industry. Pressure from procurement and fierce competitors are key commercial challenges for medtech companies, resulting in increasing price pressure. In addition, the growing price aggressiveness of smaller players is starting to make established companies feel uncomfortable. "Companies have to be careful that their market prices don't get driven down," says Kruetten. "It's up to them to make sure the market is respecting the product value they offer." Reimbursement is still an important challenge, but to a lesser extent than it was last year.



Defensible pricing structures need to be put on the agenda

Study respondents are aware of the fact that they need to become active if they want to persevere in this market environment. Enhancing sales effectiveness is most frequently named, ahead of other factors, as the major internal challenge to be faced in 2013.

Ranked second, respondents name the challenge of effectively managing product prices, which involves finding the right trade-off between value, service and price. When analyzing levers such as managing price erosion or obtaining price premiums for new products, the research results reflect how much managers are worrying about the quality of their price execution. Many are concerned that they will be unable to successfully implement annual price increases. This applies even more to companies selling directly to hospitals than to those selling directly to retailers. What's more, the whole range of companies feel extremely vulnerable in price execution when it comes to "big deals", be it through tenders, contract agreements with Group Purchasing Organizations (GPOs) or chains.

Under the current economic circumstances, medtech companies definitely have to pull other levers if they want to get ahead of their competitors and thrive in the current harsh context. Developing and implementing defensible price structures is therefore a major challenge for the industry's players. Even though most companies have formal training programs for the sales force in place, they often don't fully utilize the potential of value-based pricing approaches. "The most striking result of our research is how insufficiently medtech companies are addressing most key performance levers in pricing and how they are lacking viable measures to correct this," says co-author Carlos Meca, Senior Consultant in Simon-Kucher's medtech team. "Smarter price execution might not be the magic formula, but it's certainly a requirement to pave a medtech company's way to success" Meca concludes. "It's just a matter of getting started – before it's too late and the damage is irreparable."

INTERVIEW

We interviewed **Joerg Kruetten** Executive Vice-President at Simon-Kucher & Partners and head of the Medtech competence center.



INFOMEDIX- Who are price-aggressive players and where do they come from?

We currently observe three kinds of companies that pro-actively compete on price to drive volumes and market share. First are the “broad-liners” from Asia. They have broad product portfolios and perform their own R&D, and they benefit cost-wise from lower personnel costs, economies of scale, favorable currency fluctuations and/or lean sales and service models.

Next are the “copycats”. These are often one-product companies that copy established products by carefully circumventing existing patents. They are comparably small and their operations are lean. We can find numerous examples in the cardiac, peripheral stent and orthopedic trauma/spine segments. Finally we have the “one-stop-shop” distributors, which benefit from economies of scale, this time in procurement and sales. They offer extensive ranges of private label and branded products.

INFOMEDIX- What do you mean by “smarter price execution and enhanced sales effectiveness”?

I would like to mention five key aspects of smarter price execution.

One: Knowing what market share you deserve and where your natural spaces in the market are. That means not chasing every deal aggressively and opportunistically, but making conscious competitive moves, particularly in tender markets.

Two: Having defendable price structures in place, i.e. guidelines that link discounts and/or bonuses to objective customer performance criteria.

Three: Charging for customer services that go beyond the industry standard – or at least treating services provided for free as a price concession in customer price negotiations.

Four: Applying innovative pricing models, such as prices per patient or per procedure, or product/service packages that reduce customers’ focus on single product prices and put the value of the total offer into perspective with price.

Five: Measuring your pricing performance. That means tracking price erosion, measuring target price deviations and customer volume realization, and taking corrective action where necessary.

Turning to enhanced sales effectiveness, an additional four points are important.

One: Structured and reliable customer intelligence in terms of account market shares, competitor prices, customer switching barriers, procurement policies, key stakeholders and so on.

Two: Selling the clinical and/or (health-)economic value of your total offer to your customers’ relevant decision-makers and decision-influencers – based on hard facts wherever possible.

Three: Effective engagement models, role plays and skills in terms of selling value, negotiating and making commercial decisions. Good value sellers are often poor negotiators.

Four: Measuring and incentivizing sales performance beyond simple revenue and order intake. In other words, customer profitability and/or target price compliance should be important KPIs, at least for everybody who makes commercial decisions.

INFOMEDIX- Why 2013 be a positive year for medical technology in Europe?

The companies’ outlook for 2013 is far from good because prices and profits in general remain under severe pressure. It is, however, slightly more positive than in previous years. I would call it “cautiously optimistic”.

In our recent industry barometer survey we saw that the various sectors – medical equipment, devices and consumables – expect mid-single-digit revenue and profit growth overall. That’s what they need to be able to maintain their current R&D investment levels.

We see a number of important underlying developments. Market demand continues to grow, particularly related to chronic diseases and from emerging markets. A significant number of innovations are being launched. And the healthcare funding and procurement environment is expected to be fairly stable in 2013 following several years of cuts and uncertainty.

INFOMEDIX- Would you recap the Medtech Barometer 2013’s salient points?

Business opportunities in Europe are still affected by constrained funding, but the expectations for 2013 are slightly more optimistic than in recent years for the reasons I just mentioned. **Europe remains a tough healthcare marketplace due to constrained payer and customer budgets and customer procurement centralization paired with dynamic price competition.** Leading companies see more rigid and structured price execution, together with adapting traditional sales models to the changing market environment, as key areas for improvement.

Based on our experience as the world’s leading pricing advisor and marketing specialist for healthcare products, we can only encourage companies to work on these areas. Despite budgetary constraints, even mature healthcare markets will continue to offer great business opportunities compared to other markets. Demographics will drive demand, which in turn will drive the need for innovation. But successful innovation requires proof and effective communication of added clinical and/or (health-) economic value. This has to go hand in hand with strengthening commercial strategies, policies and implementation capabilities.

*About the MedTech Barometer 2013

The MedTech Barometer 2013 reveals commercial trends and challenges in the medical technology industry. The over 60 survey respondents come from a pool of C-level executives, regional and BU heads, and senior functional executives representing all key sub-sectors including consumables, equipment, devices, diagnostics and dental.

The management summary is available upon request.

Study authors

Joerg Kruetten is Executive Vice President of Simon-Kucher & Partners and head of the global medical technology competence center in Luxembourg. **Dr. Carlos Meca** is a senior consultant in Simon-Kucher & Partners’ medtech team.

Simon-Kucher & Partners, Strategy & Marketing Consultants:

Simon-Kucher & Partners is a global consulting firm with 660 professionals in 25 offices worldwide focusing on Smart Profit GrowthSM. Founded in 1985, the company has 28 years of experience providing strategy and marketing consulting and is regarded as the world’s leading pricing advisor.

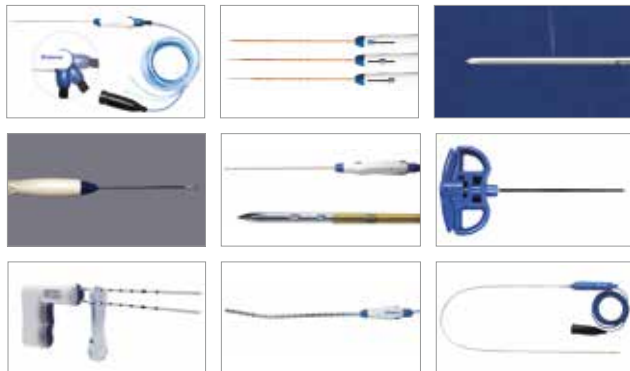
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Eucomed launches portal on market access in European countries

Reimbursement map offers high-quality, up-to-date information on obtaining reimbursement for medical devices

Author: Lara Pippucci

Eucomed, the European Medical Technology Industry Association, announced today the launch of its Reimbursement Portal, a visual overview of national reimbursement systems and critical information on how to obtain reimbursement in these European and neighbouring countries. Available at fundingmedtech.eu, the service enables medical device manufacturers to develop a better understanding of the process of obtaining reimbursement, allowing them to develop more effective funding and reimbursement strategies. Eucomed members can benefit from a special discount up to 30%, while other medical device manufacturers who are member of Eucomed's national association members will receive a discount up to 20%.

The tool differs from other offerings on the market in terms of scope and consistency. Companies looking for comprehensive reports on various EU markets no longer have to rely on a multitude of offerings. Fundingmedtech.eu facilitates access to this data at one, centralised location.


"Medtech companies need a trustworthy source of up-to-date information about the reimbursement systems, pathways to and requirements for seeking reimbursement," said Yves Verboven, Eucomed's Head of Economic Affairs. "We know that European markets are diverse; there are as many reimbursement systems as there are countries. That is why we developed fundingmedtech.eu to offer high-quality, ever expanding information."

At launch, fundingmedtech.eu will offer reports on national healthcare and reimbursement systems for the major European markets. Starting today, the tool will cover Austria, Belgium, Denmark, Finland, France, Germany, Italy, The Netherlands, Norway, Russia, Spain, Sweden, Switzerland, and the United Kingdom. New countries will be added on a regular basis, with Poland and Turkey becoming available this April.

"We are convinced that fundingmedtech.eu will provide the needed insights into reimbursement in Europe", said Serge Bernasconi, CEO Eucomed. "It is clear that there is a lack of understanding of the effective functioning of reimbursement systems and fundingmedtech.eu will help to address this need".

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The Reimbursement of Medical Devices website is a single point of contact to continuously quality information on healthcare systems and reimbursement pathways of medical devices. The portal is developed and supported by Eucomed, the European medical technology industry association. The content of the products offered is developed by and property of Eucomed preferred partners Hull Associates, and Synergus, experts in field of reimbursement.
Visit fundingmedtech.eu

INTERVIEW

We interviewed **Mr. Yves Verboven**, Eucomed Director Market Access and Economic Policies.

INFOMEDIX- *Could you describe in few words Eucomed's activity?*

Mr. Yves Verboven - **Eucomed represents the medical technology industry in Europe. Our mission is to make modern, innovative and reliable medical technology available to more people.** Eucomed members include both national and pan-European trade and product associations as well as medical technology manufacturers. In total we represent around 25,000 designers, manufacturers and suppliers of medical technology used in the diagnosis, prevention, treatment and amelioration of disease and disability. **The industry we represent employs more than 575,000 people, with a market size that is estimated at roughly 100 billion in Europe and encompasses more than 500,000 different medical technologies from sticking plasters and wheel chairs through to pacemakers and replacement joints.** Eucomed promotes a balanced policy environment that enables our industry to meet the growing healthcare needs and expectations of our stakeholders. We maintain a close dialogue with them and demonstrate the value of medical technology through health-economic research, data collection, membership services and clear communications.

Our secretariat comprises some 30 experts who are in continuous contact with EU stakeholders, and we and our members are committed to ensure that fundamental collaboration with healthcare professionals adheres to the highest ethical and professional standards

INFOMEDIX- *What is the Reimbursement Portal and how does it work?*

Mr. Yves Verboven - **The Reimbursement Portal (www.funding-medtech.eu) is a visual overview of national reimbursement systems and contains critical information on how to obtain reimbursement in European and neighbouring countries.** It works by allowing interested companies to purchase reimbursement reports, with discounts for Eucomed corporate members and medical device companies that are member of a Eucomed national association member.

At launch, fundingmedtech.eu will offer reports on national healthcare and reimbursement systems for the major European markets. Starting today, the tool will cover Austria, Belgium, Denmark, Finland, France, Germany, Italy, The Netherlands, Norway, Russia, Spain, Sweden, Switzerland, and the United Kingdom. New countries will be added on a regular basis, with Poland and Turkey becoming available this April.

INFOMEDIX- *Which kind of companies could take profit of the Reimbursement Portal?*

Mr. Yves Verboven - The tool is aimed at all companies in need of trustworthy, up-to-date information about the reimbursement systems, pathways to and requirements for seeking reimbursement in Europe. European markets are diverse; there are as many reimbursement systems as there are countries. That is why Eucomed developed funding-medtech.eu as a service to the Medtech industry to offer high-quality, ever expanding information.

Statement on MEDICA 2013 by Joachim Schäfer, Managing Director of Messe Düsseldorf GmbH

The global health market is growing annually by about six per cent.

The drivers of this development are an ageing society in many countries, in others a strong population growth, technical advancement and above all, the increased purchasing power all over the world. Against this background, the health markets in the majority of countries are developing faster than the gross domestic product. **If this trend remains unchanged, the global health market will increase from well over 5 trillion euro at present to about 15 trillion euro by 2030.**

These figures from the study "Weltweite Gesundheitswirtschaft – Chancen für Deutschland" (Worldwide healthcare sector – opportunities for Germany), which was carried out by the business consultancy Roland Berger (on behalf of the Federal Ministry of Economics and Technology), explain why even providers of medical technology and their suppliers can assume positive market prospects in the medium and long term, despite a somewhat moderate trend in demand at present as a result of the financial crisis.



Irrespective of an overall growing demand for medical care and the associated medical devices and medical technologies, the structure of the demand is gradually changing. It differs in relation to countries, in some cases considerably with regard to the type of sought-after products and systems.

As a consequence of an increasing density of provision i.e. a rising number of outpatient medical care units and clinics, in many newly industrialized countries there is a strong demand for basic medical equipment in terms of a broad-ranging primary health care. The focus on innovation is low by comparison. In the "traditional" markets, for example in the major industrial countries in Europe, North America and Japan, the cost pressure in the healthcare systems is rising. This does admittedly diminish the demand. However, growth impulses boosted by the private healthcare market and the focus on innovation, are higher overall (see Hamburg Institute of International Economics study / HSH Nordbank).

The global market appears to be equally complex with regard to the choice of products. Once considered to be low-price providers, major corporations from China, for instance, are taking on the global competition with the market-dominating "big players" and have considerably



improved the quality of their products and their range of services. And even companies from emerging newly industrialized countries such as India, Malaysia and Thailand no longer just supply their domestic markets. Whether it be catheters, latex gloves or wound treatment products – in highly price-orientated market sectors they also have outlets in clinics in Europe or America.

These indicators of market development explain why MEDICA in Düsseldorf, as the largest and leading medical trade fair worldwide, has been able to continually build on its position as an influential platform for transnational business, information and expert exchange. The high level of internationality among exhibitors and visitors is testament to this. Almost three quarters of the more than 4,500 exhibitors at MEDICA 2012 were international participations. At the same time more than one in two of the total of 130,600 trade visitors came from outside Germany to the city on the Rhine.



As sophisticated as the market seems to be in its range of products and demand, the motivation of the exhibitors and visitors to follow the MEDICA motto "Be part of the No. 1" is just as diverse. For some exhibitors it is primarily about the access to the high-volume markets of Europe, other companies by contrast use the international visitor contacts at MEDICA to strengthen their global sales and distribution.

It also helps the exhibitors that the target-group specific marketing campaign accelerated in recent years has come to fruition with regards to MEDICA's visitors. In practice this means that increasingly more top decision-makers are among the visitors and incidentally, also increasingly more decision-makers from the commercial sector and medical insurance companies.

www.medica.de

Zdravookhraneniye 2013

The next edition of the Russian Health Week Forum, including Zdravookhraneniye 2013 and Healthy Lifestyle 2013, will take place from December 9 to 13, 2013 at Expocentre Fairgrounds.

As usual, the biggest medical exhibition and congress of the whole Russia will be supported by the Russian Ministry of Health Care and the Russian Ministry of Industry and Trade.

The international recognition and high prestige of Zdravookhraneniye and Healthy Lifestyle are highlighted by the labels of approval of UFI, the Global Association of the Exhibition Industry, and RUEF, the Russian Union of Exhibitions and Fairs.

Last year Zdravookhraneniye 2012 and Healthy Lifestyle 2012 welcomed leading domestic firms and foreign industry leaders: **1,093 companies from 42 countries.**



The exhibition area covered 21,945 net square meters.

Exhibitors from Belgium, China, Czech Republic, Germany, South Korea, Sweden, Switzerland and Turkey were supported by their respective governments.

Worldwide famous companies such as Fujinon, Philips, Sony, Toshiba, Veripoll s.r.l., Westfalia, Stormoff, Balton and many others took part to the show to exhibit their innovations and new technologies.

Zdravookhraneniye 2012 and Healthy Lifestyle 2012 were attended by 22,490 people, 95% of them were industry experts. The total attendance was 41,780.

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Warsaw International Healthcare Exhibition – WIHE 2013

Scientific conferences and ability to check the latest medical equipment are waiting for the exhibitors of the International Medical Trade Fair WIHE 2013. Among the guests there will be companies wanting to present their achievements and make face-to-face business contacts.

WIHE 2013 is the largest exhibition of its kind in Warsaw. It will be held in the EXPO XXI exhibition center on October 1-3, 2013 - The event will present the latest achievements in the field of medical science - says Akmaral Amirkhanova, President of Lentewenc, Fair's organizer. - We want to show devices which use the latest and the most advanced technologies. Due to the fact that Lentewenc, the Polish subsidiary of ITE Group, as the fairgiant, it is already known that WIHE 2013 will have a strong representation of foreign manufacturers.

The event will be visited by exhibitors from many countries, including Germany, Taiwan, Russia, Slovenia, Turkey, and China. Guests will be able to see the equipment used in the diagnostic imaging, cardiology, surgery, intensive care and medical rescue service.

Topics will include medical equipment, complete equipment for the operating room, furniture and medical utensils, as well as IT solutions in medicine - adds Anna Falat, project manager of WIHE 2013. Together with the International Medical Trade Fair WIHE 2013 - Hospital, there will be International Pharmaceutical Trade Fair WIHE 2013 - Pharmacy.

Who will be present at the WIHE 2013?

Invitations were sent to the representatives of all production, distribution and medical devices sales companies. They are both Polish and international companies willing to present their achievements and establish face-to-face business contacts.

The Visitors of WIHE 2013, are mostly the senior management in the health sector: directors of public and private hospitals, clinics and medical centers, heads of departments and managers responsible for logistics.

During the Fair, there will be two conferences, one led by Assoc. MD, Thomas Łazowski – "Modern Techniques in Anesthesiology and Intensive Care" and the other one by the National Forum of Directors and Managing Executives in Medical Entities.

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Special on Radiology: Introduction

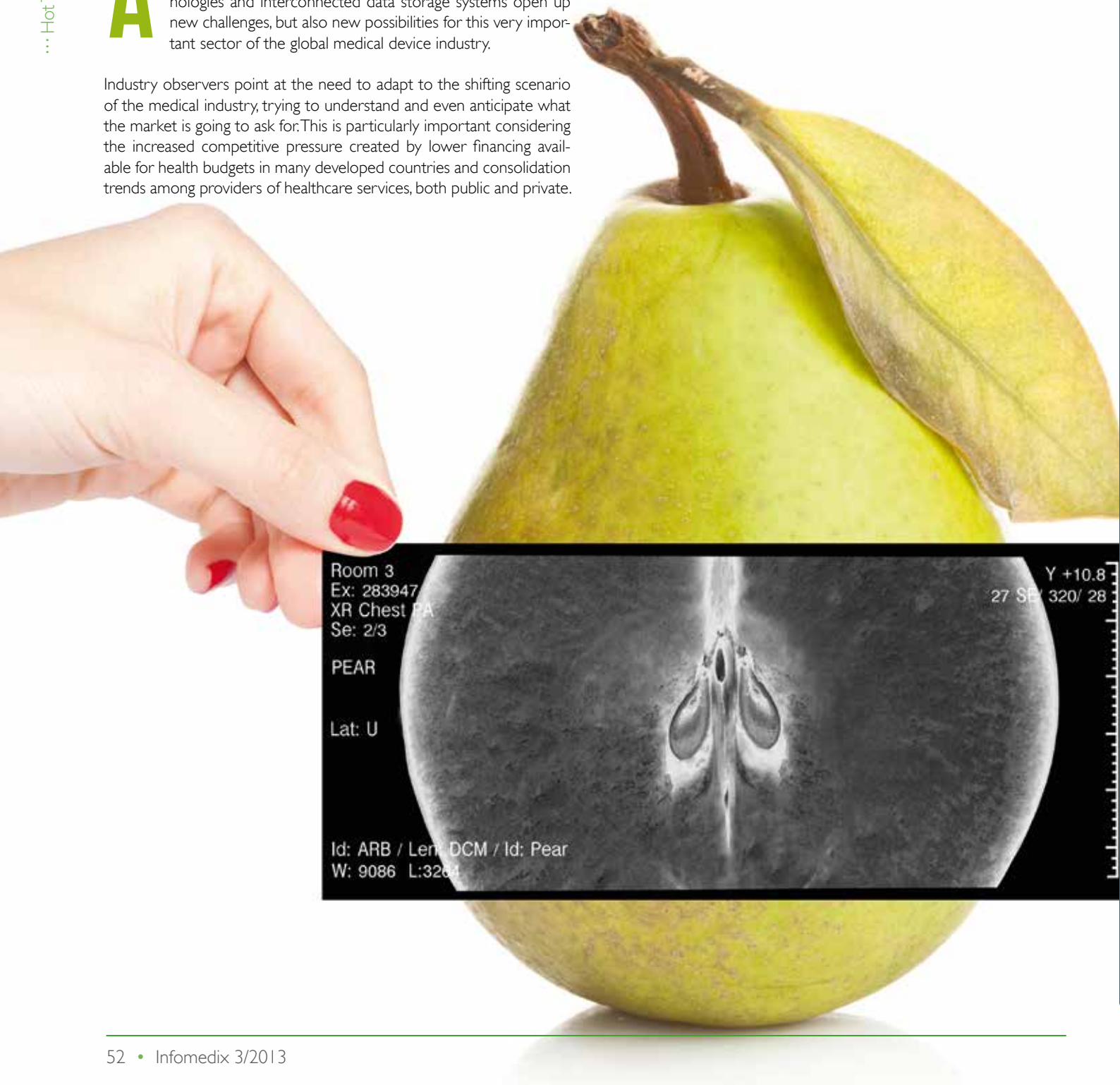
Author: Michela Adinolfi

... Hot Topic

After two decades of constant growth, the radiology industry is facing rapid market changes, as the increasing need to contain healthcare costs as well as the spreading use of digital technologies and interconnected data storage systems open up new challenges, but also new possibilities for this very important sector of the global medical device industry.

Industry observers point at the need to adapt to the shifting scenario of the medical industry, trying to understand and even anticipate what the market is going to ask for. This is particularly important considering the increased competitive pressure created by lower financing available for health budgets in many developed countries and consolidation trends among providers of healthcare services, both public and private.

Radiology is one of the most dynamic and innovative branch of the medical industry. The most recent market reports on the sector highlight the continued digitalization of x-ray systems and increased investments in emerging regions as main trends.





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Radiology market: a global overview

The value and growth prospects of the global x-ray market varies according to the sources and methods of analysis; however, **the current value of the market was estimated around US\$10 billion in 2012 and it is expected to reach US\$12 billion in 2017, with average 5% growth over this period.**

Radiology is one of the most dynamic and innovative branch of the medical industry. The most recent market reports on the sector highlight the continued digitalization of x-ray systems and increased investments in emerging regions as main trends.

Despite the effects of the global recession in the latest five years, the market for x-ray equipment is expected to recover thanks to several factors:

- **Emerging markets such as China, India, Latin America and some Southeastern Asian countries are investing more in their healthcare systems and experiencing rising demand for private health services;**
- **Digital technologies offering lower-cost solutions suitable for reduced health budgets enjoy growing popularity;**
- **Minimally invasive surgery is replacing open surgery in many procedures that require high-end digital x-ray equipment to be performed.**

Other more general factors influencing the x-ray market are the ageing trend of the population in almost all developed countries and even in some emerging economies, as well as higher health awareness among patients and rising incomes for larger classes of consumers who demand for higher quality diagnostic services and therapies.

Within this framework, the most interesting developments were seen in the areas of digital x-ray systems, PACS and mobile x-ray units. The firm "MarketsandMarkets" estimated that global digital x-ray market will reach US\$4.8 billion by 2018, growing at average 4.5% annually.

According to a recent report by IMS Research, the demand for mobile x-ray and retrofit upgrade kits will drive the sector's growth in the near future, with respective 13% and 15% growth by 2017, while general radiography is expected to rise from US\$2.9 to US\$3.69 billion over the same period.

IMS Research also reported that analog x-ray sales are expected to decline as computed and digital radiography increase their share of the market, offering several advantages such as low

dosage, image quality and storage capacity and immediate data analysis. In particular, the market for digital radiography is growing faster than the market for computed radiography, as the adoption of cost-effective solutions with the increasing use of PACS makes it the most promising segment.

Let's take a closer look to the different regional markets:

North America

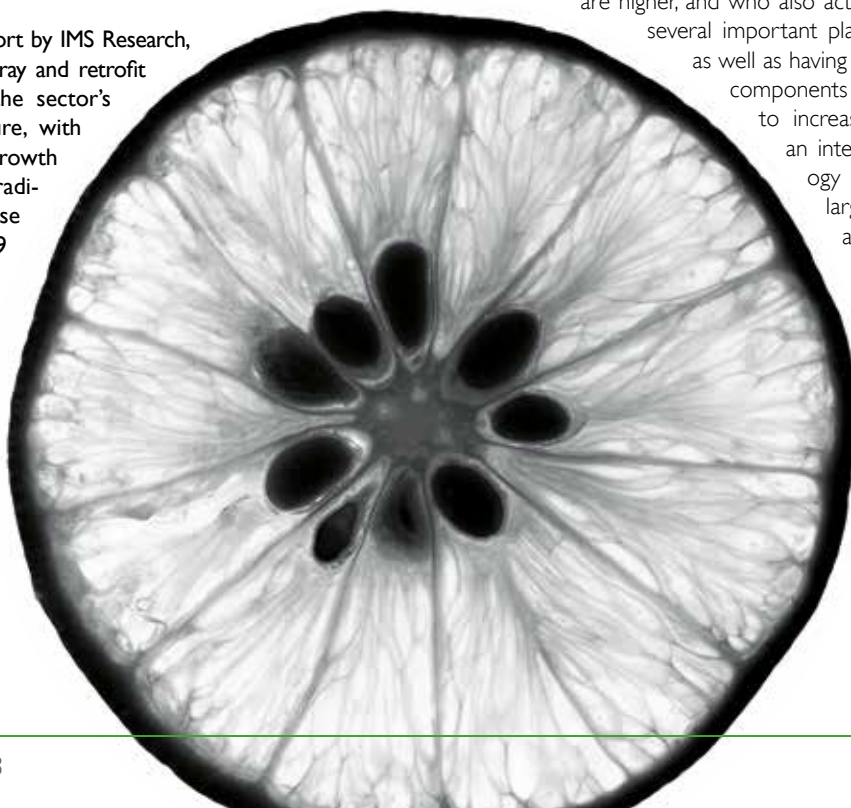
According to Transparency Market Research, the North American x-ray market should keep a dominant position until 2018 at least. **In particular, the North American market has the largest share of the global digital radiology market revenue (34%), followed by Europe.**

Traditionally at the forefront of medical innovation, the industry is faced with reimbursement issues and a difficult job environment for the radiology specialty, requiring an even greater focus on innovation aimed at reaching the maximum efficiency.

The current trend is towards increased partnerships and consolidations among the services providers and the industry, due to reduced capital investment in equipment. Although the sales trend hasn't improved much in 2013, there are expectations that the sales peak registered in the years immediately preceding the crisis will eventually turn into a large share of aged equipment by next year. This, too, might contribute to accelerate the consolidation trend observed so far, especially for smaller establishments that have more difficulties in coping with a still challenging environment.

Latin America

The Latin American market for radiology devices is dominated by the economies of Brazil and Mexico, where the growth prospects are higher; and who also act as manufacturing base for several important players in the x-ray industry, as well as having a local production of x-ray components and devices that is trying to increase its competitiveness on an international scale. The radiology market, however, remains largely supplied by imports as shown by Brazil itself: in 2012, total export of x-ray equipment and products totaled US\$22.3 million, while imports totaled 666.3 million, which means about 30 times the export quota (Source: ABIMO).



Interview - VILLA SISTEMI MEDICALI

Contact Person: Matteo Lavezzini (International Marketing Manager)

Website: www.villasm.com

1. Which field of radiology is your company specialized in?

Why did you choose to focus on this product area?

Villa Sistemi Medicali is recognized as a company specialized in the fields of general radiology, radio-fluoroscopy and dental imaging; this allows medical centers to choose V.S.M. as a total solution provider; thus making easier all processes of order, installation and assistance. With particular reference to fluoroscopy and dental radiology, users are often extremely specialized and require from the manufacturer a level of knowledge that we definitely have, being these applications part of our historical know-how.

2. What are the most innovative features of your product/technology?

Both our medical and dental products can rely on the most innovative technologies, particularly for what concerns Digital Radiology; during the last years we invested a lot of efforts also on Cone Beam technologies for dental 3D reconstruction, an innovative method allowing a significant reduction of dose compared to traditional CT machines. In general, our extensive application knowledge allows us to engineer products particularly effective in terms of user friendliness and patient positioning. Finally, proud of our Italian identity, on all our units we pay particular attention to the aspects of finishing and industrial design.

3. What is your company's future focus in terms of research and development?

At Medica we are releasing a totally new bucky room, offering a state-of-the-art solution for this type of products. In the next future we are

going on researching on DR technologies able to properly match the specs of this system and, being fluoroscopy one of our core businesses, we are keeping great attention on how this specialization is evolving. Regarding our dental division, we have plans to further enlarge our platform of panoramic products and 3D Cone Beam machines.

4. How much is the increasing integration of radiology with eHealth, digital and mobile applications impacting on your business and design model?

Nowadays a new family of products cannot even be conceived without having in mind the applications deriving from eHealth and digitalization. Notably, Villa Sistemi Medicali has always been very committed on digital technologies and keen to catch the business opportunities coming from them, as witnessed by being one of the first companies worldwide to introduce few years ago a DRF solution on Remote Controlled Tables.

5. What markets in particular is your company going to target in the near future?

Since ever, V.S.M. is active worldwide and surely we are not planning to reduce our global presence, particularly in this period of economic crisis where the existence in all possible markets can be crucial to maintain positive financial results.

6. What would you like to say to your potential dealers and customers?

We are committed to go on serving our customers with passion and professionalism, anticipating the needs of the market and keeping offering solutions rather than purely products. It is a simple yet effective strategy that in V.S.M. has been working for more than 50 years and we want to stay on course in this way.

... Hot Topic



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Europe

According to COCIR, the European Coordination Committee of the Radiological, Electromedical and Healthcare IT Industry, the European radiology market is valued €2.5 billion. Dominique Blanc, Vice President Sales Radiology at GE Healthcare, stated that according to the company's estimate there are currently around 10,000 radiology establishments with at least 1 CT scanner in Europe. However, he also noted how the great diversity across European countries in terms of economy, healthcare systems, budgets and spending needs impacts on radiology investments. While southern European countries are faced with financial constraints that limited the available funds for investments, including radiology, Nordic countries and Germany continue to invest in advanced and innovative imaging technologies.

According to Frost & Sullivan, the Western European market is quite saturated but interventional radiology enjoys a relevant potential for growth as end users are increasingly interested in user-friendly, integrated solutions.

Asia

Among the factors that are supporting growth for quality-intensive medical services including medical imaging and therapy based on x-rays there are the increased attention paid by Asian governments to the health of the population and the need to lower the hospitalization rates, which are a chronic problem in many Asian healthcare systems. Early diagnosis and treatment as well as regular health check-ups are all part of public goals to improve the health budgets.

Since limited public funding is available, x-ray equipment is being provided more and more often by companies sponsoring educational institutions and private hospitals. Price is still a crucial component of the market together with after-sales service and close cooperation with local partners.

Focus on...

1) Patient-Centered Radiology

The definition of patient-centered radiology refers to a comprehensive concept of radiology, which is becoming increasingly important due to the transformation of the sector from the simple provision of a service to an integrated system centered on outcome-based measurement.

As great quantities of patients' data are made available by sophisticated archiving softwares, it becomes essential to ensure that this information is shared among the providers in charge of delivering diagnostic services and treatments to the patient. The ability to access prior examinations data and screening results helps prevent unnecessary repetition of exams or radiation exposure.

The IT infrastructure necessary to handle such massive amounts of data is available but often too expensive to be adopted on the necessary scale and it is limited by regulations that aim to protect patients' privacy but at the same time make it difficult to exchange relevant data among different providers. However, even within a single radiology service provider, patient-centered softwares prove to be an important resource to save time and money while at the same time improving the perceived quality of the service.



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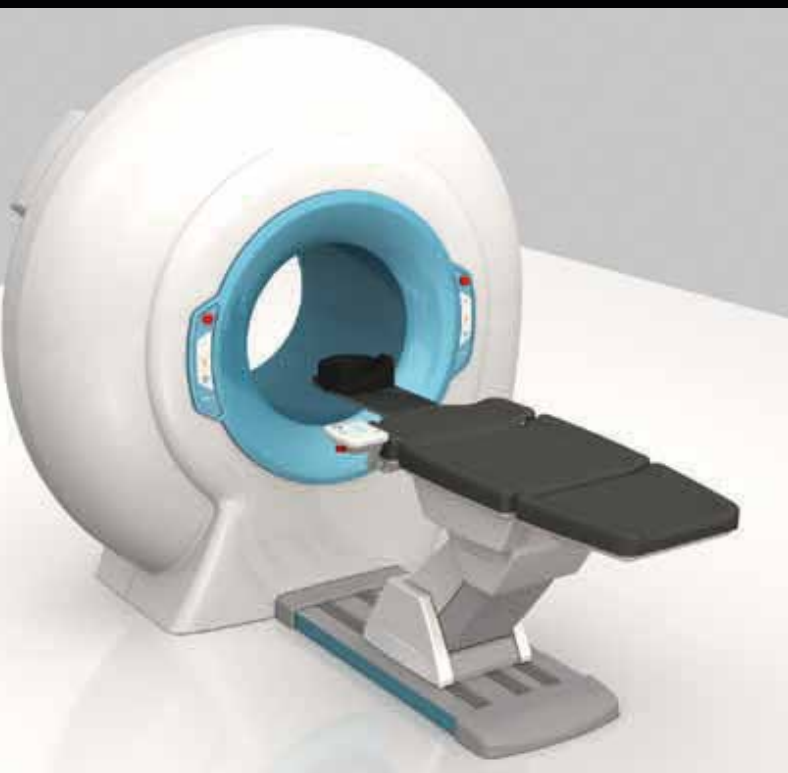
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2) Digital Radiology

Computed radiography systems dominate the global x-ray market due to their lower expense and decreased training requirements compared with digital radiography systems. However, the higher availability of cost-effective DR systems, along with the increased PACS implementation rate, has made the global digital radiography x-ray systems market the fastest growing x-ray sector.

The share of digital equipment compared to non-digital x-ray ranges from 10% to 20%, in sectors such as dental and veterinary x-ray and mobile C-arm. On the other hand, in sectors such as fluoroscopy and mammography the percentage grows up to 50%, to peak at over 80% for interventional radiology. According to IHS, digital technologies in general radiography such as flat-panel detectors (FPD) are going to increase their share of the market from current 15% to 25% within the next four years. For instance, the mammography market is already dominated by FPD full-field digital mammography (FPD-FFDM) equipment, especially in the more developed markets.

Emerging markets still lag behind in terms of demand for breast screening, and the limited capital available to healthcare providers make FPD technology too expensive to implement it on a larger scale. The situation is different for mobile x-ray systems, that particularly benefit from wireless flat-panel x-ray equipment thanks to faster processing and longer battery life. Besides the obvious advantages in terms of time saving and patient comfort, digital FPD system also allow dose reduction benefits.

FPD technology is also increasingly used in mobile C-arms in procedures such as transcatheter aortic valve implantation (TAVI), with the use of medical imaging as an alternative to open-heart surgery, as well as in the veterinary market. Although dental x-ray is still dominated by analog film, digital sensors and photostimulable phosphor imaging are

gaining momentum, as well as extraoral imaging using flat-panel detectors based on complementary metal-oxide-semiconductor (CMOS) technology. According to IMS, shipments of flat-panel detector and retrofit flat-panel detector DR systems accounted for nearly 15% of all general radiography shipments in 2012, and the figure is expected to reach 25% in 2017. This technology therefore constitutes an important future growth driver.

3) Interventional Radiology

Interventional radiology involves the use of minimally invasive procedures for diagnosis and treatment, performed with the aid of image guidance systems. The areas of application of interventional radiology range from neurology to cardiology, gastrointestinal and urology. The profile of health diseases is changing rapidly especially in the fastest-growing economies, which are experiencing rising incidence of chronic disorders associated with wealthier lifestyles. The ageing trend is also a factor influencing the growing interest towards interventional radiology, since people aged 50 years and above form the major target population demanding interventional radiology procedures.

The increasing popularity of minimally invasive procedures has boosted the demand for hybrid operating rooms accommodating interventional radiology systems, allowing surgeons to perform procedures such as heart valve replacements using interventional imaging for guidance, with better patient outcomes and lower risk of infection. Mobile C-arm equipment is also benefiting from a growing trend toward minimally invasive surgery.

However, according to a report by InMedica (IMS Research) the market is already close to the saturation point and the high costs make it difficult to expand the scope of interventional procedures to larger shares of the market. Global revenue growth is expected to be less than 1% in 2013.

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To cope with these challenges, manufacturers are developing combined radiology and cardiology interventional x-ray systems, especially targeting China and Brazil where demand for such systems is higher. In contrast with the revenue from interventional radiology procedures alone, provisions for such combined systems are more optimistic and rise to an annual growth of 8% to 10% over the next five years.

Imaging IT and PACS

PACS stands for Picture Archiving and Communication System, a medical imaging technology that allows transmission of electronic images taken from x-ray machines to various workstations through the process of digital imaging and communications in medicine (DICOM). Images are archived and can be retransmitted to remote workstations to be analyzed, then sent back for storage.

The digital x-ray market is particularly sensitive to the development of PACS, as they are closely integrated. By eliminating the need for x-ray films or hard copies of medical images, PACS allows instant transmission of medical images to practitioners located at any distances, even in remote locations.

Besides acting as interface between x-ray images and information systems including electronic medical records, PACS offer significant advantages to the home healthcare market and to the segment of portable digital x-ray systems. Over the past three years there was a trend towards cloud PACS systems, which might be broadly defined as having a third-party server providing and hosting both application and storage service. However market response was quite slow also in consequence of lacking clear legislation on security issues involved.

Although cloud-based PACS offer the advantage to simplify image and data sharing and cut costs, secure storage of medical images remains the big issue. According to "Applied Radiology", medical images are projected to require 30% of the world's storage and could soon represent 10% of all of U.S. healthcare costs or about 1.5% of US GDP. In other words, an average 100-bed hospital, performing 40,000-50,000 radiology exams annually, is adding 5 terabytes of data to image storage. Mobile apps add to the future potential of the cloud-based PACS, enabling instantaneous communications between radiologists and referring doctors, so mobile platforms are also a key to allow cooperation from even very distant locations. It is worth mentioning that the global market for mobile health care services, like smartphone and tablet apps, is expected to reach US\$26 billion by 2017.

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... Hot Topic

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Piemonte, north-western Italian region, ranks first in terms of private investment in R&D and for the number of industrial patents filed and biotech start-ups in Italy, the world's 6th largest pharmaceutical market and home to 15% of Europe's biotech companies. **In this fertile environment, the bioscience industry (biotech, pharmaceutical, med-tech etc.), which includes both SMEs and multinational companies like Merck-Serono, Bracco Imaging, Takeda, Diasorin Antibioticos and Sorin Cardio, in Piemonte counts over 100 firms employing approximately 3,000 people.** In life sciences extended to the biomedical field and to services, the number of companies rises to 360, mainly SMEs. The biotech, pharmaceutical and medical sectors together employ approximately 3,500 scientists. There are also 800 public research groups (60% in biomedicine) that can rely on a good collaborative network of businesses, universities, research centres, training structures and science and technology parks, laboratories, incubators and venture capital companies (Source: www.bioindustry-park.eu).



The strong skills existing in other sectors such as ICT, electronics, new materials and nanotechnologies have favoured the achievement of significant results and expertise in bioinformatics, e-health, diagnostics and biomedical equipment. **Piemonte is at Medica (Düsseldorf, November 20-23) at Hall 16 - Booth B21 represented by an integrated and homogeneous network of 16 companies capable of supplying as a comprehensive system to the requests of the wellness and medical sectors** with: tele-medicine solutions and software technologies for hospitals that manage patients' data as well as medical emergencies, electromedical equipment, biomedical components and devices, innovative titanium crutches, technologically advanced wheelchairs, special lamps for medical use, equipment for cosmetics, sterilized and environmental friendly clothes, elastic-therapeutic stocking with optimal fit and long life, consumer products. The participation is organised by Piemonte Agency on behalf of Regione Piemonte and the Torino, Cuneo and Novara Chambers of Commerce, in cooperation with the BioIndustry Park and bioPmed, within Health & Wellness, project providing international players the shortest way to meet and start business with a selection of biotechnology and health and wellness top class companies (www.centroestero.org).



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2. What are the most innovative features of your product/technology?

Our products, with microprocessor and user interface, are managed directly from a computer.

3. What is your company's future focus in terms of research and development?

For monoblocks, we aim at improving heat dispersion in the overall unit/monoblock, both directly and with support systems. Research is focussing both on materials and solutions. For inverters, we aim at streamlining our solutions and ensuring reliability both in terms of components and lay-out, i.e. capability integration, streamlining of connections and space as well as the development of a line of inverters "with a memory", with heating, dissipation and workload data stored in dedicated memory areas. Overall, we aim at helping our customers to improve the management of the overall systems.

4. How much is the increasing integration of radiology with eHealth, digital and mobile applications impacting on your business and design model?

Technology evolution with new applications in the industry provides new business opportunities, especially with customers manufacturing devices. Therefore, our opinion is definitely positive.

5. What markets in particular is your company going to target in the near future?

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Global Wealth Distribution



Creating wealth, it seems, is hardwired into us as a species. The total number of HNWLs around the world is increasing once more, despite the global economy still suffering from the after-shocks of the credit crunch and the ensuing financial crisis. Much of this wealth creation is taking place in the world's new economic powerhouses, but London and New York are still considered the most important cities for the super-rich – at least for now...

Onwards and Upwards

It has now been six years since the initial signs of the financial crisis started to emerge, but the global economy is still feeling the effects. In 2012, economic growth slipped to its lowest level since 2009.

While the signs are that growth will pick up this year, many major economies are still performing well below trend, with some struggling to achieve any improvement in economic output at all. But despite this gloomy economic backdrop, there was still room for wealth creation in 2012.

The number of people with US\$30m or more in net assets (referred to throughout this report as HNWIs) rose by 5% last year, or nearly 8,700, according to data prepared exclusively for The Wealth Report by Wealth-X, a wealth intelligence firm.

The combined wealth held by HNWIs also grew by 2%, or US\$566bn, to just over US\$26tr in 2012. **Over the next 10 years, 95,000 people are forecast to break the US\$30m wealth barrier – a cumulative 50% rise, which will take the total number of HNWIs across the globe to around 285,665.**

Mykolas Rambus, CEO of Wealth-X, says: "There are still opportunities in many markets around the world, especially for those who can look beyond the difficulties in some developed economies, and take a more global outlook."

However, he admits there are challenges. "Credit is still much more difficult to come by in the wake of the financial crisis. The capital provided by central bankers' stimulus packages has largely failed to trickle down into the economy where entrepreneurs can take advantage of it. The venture capital world used to be 'frothy'; that is no longer the case. Having said that, individuals are still growing their businesses, but the broader financial conditions are unlikely to change in the near future."

Economic headwinds, as well as the volatility that characterised the performance of equity and commodity markets during the year, have had an impact. The total net worth of HNWIs in Asia, for example, slipped slightly from US\$6.6tr to US\$6.4tr in 2012, but their numbers still rose by 3% overall. "The uneven performance of real estate and equity markets across Asia has led to the decline in wealth," Mr Rambus says. Key Asian stock markets underperformed compared with wider world indices for much of 2012, although there was a rally towards the end of the year. The FTSE world composite index of shares climbed modestly, although it ended 2012 some way below the highs seen in 2007.

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- Increase in billionaires 2012-22 (region)

- HNWI population % change 2012-22 (region)

- Total HNWI WEALTH (US\$bn)

- Increase in billionaires 2012-22 (country)

Number of billionaires by region

	2011	2012	2022	Change (2012-2022)
AFRICA	25	35	75	117%
ASIA	496	543	1,191	119%
EUROPE	672	708	1,115	57%
LATIN AMERICA	123	145	301	108%
MIDDLE EAST	128	140	203	45%
NORTH AMERICA	487	586	1,146	96%
AUSTRALASIA	36	41	45	10%
TOTAL	1,967	2,198	4,076	85%

HNWI* population by region

	2011	2012	2022	Change (2012-2022)
AFRICA	2,099	2,488	4,197	69%
ASIA	42,428	43,726	82,369	88%
EUROPE	53,538	54,170	70,864	31%
LATIN AMERICA	13,818	15,230	28,628	88%
MIDDLE EAST	4,377	4,675	7,378	58%
NORTH AMERICA	61,338	65,579	86,865	32%
AUSTRALASIA	3,548	3,967	5,364	35%
TOTAL	181,146	189,835	285,665	50%

*An HNWI is defined as having net assets of over US\$30m

Top countries for billionaires

	2012	2022	Change
UNITED STATES	545	1,101	103%
CHINA	154	483	214%
GERMANY	149	300	101%
UK	149	276	85%
INDIA	122	225	84%
BRAZIL	53	136	157%
RUSSIA	102	126	24%
HONG KONG	70	97	39%
INDONESIA	31	90	190%
SWITZERLAND	63	75	19%

HNWI populations for selected countries

	2012	2022	Change
NORTH AMERICA			
CANADA	4,922	6,637	35%
UNITED STATES	60,657	80,228	32%
	2012	2022	Change
LATIN AMERICA			
BRAZIL	4,618	10,935	138%
ARGENTINA	1,000	1,743	74%
CHILE	549	850	55%
COLUMBIA	740	1,063	44%
MEXICO	3,373	4,842	44%
VENEZUELA	644	585	-9%

Top 30 global cities by HNWI population

	2012	2022	Change
1 NEW YORK	7,580	10,306	36%
2 LONDON	6,015	8,202	24%
3 TOKYO	5,440	6,763	24%
4 SAN FRANCISCO	4,590	6,665	45%
5 LOS ANGELES	4,520	6,075	34%
6 BEIJING	2,285	5,262	130%
7 MUMBAI	2,105	4,988	137%
8 HONG KONG	3,205	4,780	49%
9 SAO PAULO	1,880	4,566	143%
10 RIO DE JANEIRO	1,740	4,285	146%
11 DELHI	1,945	4,278	120%
12 MEXICO CITY	2,585	3,901	51%
13 OSAKA	2,970	3,813	28%
14 SHANGHAI	1,415	3,704	162%
15 CHICAGO	2,615	3,689	41%
16 PARIS	2,860	3,672	28%
17 HOUSTON	2,295	3,397	48%
18 WASHINGTON DC	2,395	3,188	33%
19 DALLAS	2,020	2,927	45%
20 TORONTO	1,765	2,367	34%
21 ZURICH	1,805	2,333	29%
22 MUNICH	1,607	2,117	27%
23 SINGAPORE	1,345	1,930	43%
24 SYDNEY	1,405	1,925	37%
25 DUESSELDORF	1,420	1,872	32%
26 HAMBURG	1,370	1,788	32%
27 GENEVA	1,360	1,724	27%
28 MELBOURNE	1,150	1,621	41%
29 FRANKFURT	1,220	1,562	28%
30 ROME	1,130	1,351	20%

Mixed fortunes

China is grappling with what Bert Hofman, Chief East-Asia and Pacific Economist at the World Bank, calls a "double whammy" of weaker exports and sluggish domestic demand.

However, it is still expected to continue outperforming its rivals, overtaking the US as the world's largest economy by the end of this decade, based on figures from the Economist Intelligence Unit (see chart below).

Likewise, wealth creation in China – and wider Asia – will continue, according to Wealth-X, with China's ultra wealthy population more than doubling by 2022.

Indonesia is also expected to experience a relative boom over the next decade, albeit from a low base. HNWI's are tipped to climb by more than 400% to 5,161 by 2022, reflecting international confidence in the potential of the economy, as signaled by robust direct investment during the last year.

Despite recent economic concerns, the number of HNWI's in India is expected to more than double over the next 10 years, rising by 137% in Mumbai alone.

This will give India – along with China and Japan – the highest number of HNWI's in Asia by 2022.

Intriguingly, Wealth-X figures suggest that one of the most noticeable jumps in HNWI numbers will be in Myanmar, underlining the link between wealth creation and an open economy. There are currently fewer than 40 HNWI's in the country, Wealth-X estimates, but this is expected to rise more than seven-fold over the next decade in the wake of sweeping political change. The easing of sanctions and pledges of funding for development projects underlines the fact that progress is now being recognized internationally. "Foreign firms are establishing a presence in Myanmar and opportunities to develop infrastructure, energy, international banking, and education should enable private enterprises to work with the government to develop the country," Mr Rambus says.

Across Asia, the number of HNWI's is set to rise by 88% over the next decade, the joint highest rate of growth in any world region, matched only by Latin America. By 2022, there will be more than 82,300 HNWI's in Asia, with a combined wealth of US\$12.6tr, according to Wealth-X, making it the biggest hub for wealthy individuals outside North America.

Cautious optimism

Mr Rambus says that the US will remain dominant in terms of numbers of HNWIs and billionaires over the next 10 years, despite growth in the East. "The industrial revolutions in the US and the UK acted as a base for the large concentration of wealth still evident in these areas" he says.

North America will still have some 30% of the world's HNWIs in 2022, although this is down from the current 34%.

Within the US, the biggest rise in the concentration of HNWIs is expected to be outside New York, despite its status as the world's pre-eminent global city. Wealth-X's survey of HNWl populations in the world's leading cities shows that Houston, San Francisco and Dallas will see the most significant rise in HNWIs in the US over the next 10 years. New York, however, will still boast the largest number of HNWIs of any city in the world in 2022.

Latin America is another growth story, Mr Rambus says. There are huge opportunities in the region, thanks to the rise of the middle classes. The natural resources within the region are also a boost for wealth creation."

The number of HNWIs in Brazil is expected to climb by nearly 140%. However, Venezuela is forecast to experience a drop over the next decade. "We see a diminishing story," Mr Rambus says. "Unless there is political change, Venezuela will continue to face challenges to creating wealth."

HNWI populations in Sao Paulo and Rio de Janeiro will rise by more than 140% over the next decade, putting them in the top 10 cities in terms of growth. By 2022, one in 10 of the world's HNWIs will be living in Latin America.

Europe saw the most modest growth in the number of HNWIs last year, a symptom of the ongoing crisis in the eurozone. The total wealth held by the European ultrawealthy also remained unchanged at around US\$7tr.

But Wealth-X forecasts that wealth creation will pick up over the coming years, with a 31% rise in the number of HNWIs by 2022. Russia and Ukraine will see the highest growth levels in Europe, but Germany will still be home to the largest population of HNWIs in 2022, followed by the UK.

This positive outlook is reflected in the Attitudes Survey carried out for The Wealth Report. The survey, based on the opinions of wealth advisors and private bankers, shows that respondents in Europe expect the local economic situation to have a less negative impact on their clients' ability to create and preserve wealth this year than in 2012.

World's top 20 economies by nominal GDP (US\$BN AT PPP*)

2012	
US	15,697
CHINA	12,556
INDIA	4,850
JAPAN	4,562
GERMANY	3,318
RUSSIAN FED.	2,518
BRAZIL	2,358
FRANCE	2,331
UK	2,276
MEXICO	2,061
ITALY	1,990
S.KOREA	1,561
SPAIN	1,488
CANADA	1,486
INDONESIA	1,216
TURKEY	1,128
TAIWAN	982
IRAN	975
AUSTRALIA	970
POLAND	799
2030	
CHINA	44,456
US	35,355
INDIA	21,233
JAPAN	7,841
GERMANY	6,533
RUSSIAN FED.	6,529
BRAZIL	6,500
MEXICO	5,075
FRANCE	4,580
INDONESIA	4,586
UK	4,529
S.KOREA	4,105
ITALY	3,544
CANADA	3,285
TURKEY	3,238
SPAIN	2,833
TAIWAN	2,508
AUSTRALIA	2,438
IRAN	2,280
S.ARBABIA	2,231

*Purchasing Power Parity

EUROPE, MIDDLE EAST & AFRICA FOCUS ON HEALTH

Wealth-X (wealthx.com)

EUROPE	+57	+31	6,966
UK	+85%		
GERMANY	+101%		
SWITZERLAND	+19%		
RUSSIA	+24%		
AFRICA	+117	+69%	332
MIDDLE EAST	+45%	+58%	729

- Increase in billionaires 2012-22 (region)
- HNWI population % change 2012-22 (region)
- Total HNWI WEALTH (US\$bn)
- Increase in billionaires 2012-22 (country)

Number of billionaires by region

	2011	2012	2022	Change (2012-2022)
AFRICA	25	35	75	117%
ASIA	496	543	1,191	119%
EUROPE	672	708	1,115	57%
LATIN AMERICA	123	145	301	108%
MIDDLE EAST	128	140	203	45%
NORTH AMERICA	487	586	1,146	96%
AUSTRALASIA	36	41	45	10%
TOTAL	1,967	2,198	4,076	85%

HNWI* Population by region

	2011	2012	2022	Change (2012-2022)
AFRICA	2,099	2,488	4,197	69%
ASIA	42,428	43,726	82,369	88%
EUROPE	53,538	54,170	70,864	31%
LATIN AMERICA	13,818	15,230	28,628	88%
MIDDLE EAST	4,377	4,675	7,378	58%
NORTH AMERICA	61,338	65,579	86,865	32%
AUSTRALASIA	3,548	3,967	5,364	35%
TOTAL	181,146	189,835	285,665	50%

*An HNWI is defined as having net assets of over US\$30m

Top 10 countries for billionaires

	2012	2022	Change
UNITED STATES	543	1,101	103%
CHINA	154	483	214%
GERMANY	149	300	101%
UK	149	276	85%
INDIA	122	225	84%
BRAZIL	53	136	157%
RUSSIA	102	126	24%
HONG KONG	70	97	39%
INDONESIA	31	90	190%
SWITZERLAND	63	75	19%

HNWI populations for selected countries

	2012	2022	CHANGE
EUROPE			
UKRAINE	397	690	74%
RUSSIA	1,123	1,694	51%
SPAIN	1,441	2,063	43%
POLAND	799	1,128	41%
CZECH REPUBLIC	265	367	38%
GREECE	441	603	37%
UNITED KINGDOM	10,373	14,150	36%
SWEDEN	990	1,344	36%
IRELAND	554	751	36%
PORTUGAL	735	984	34%
ROMANIA	137	183	34%
TURKEY	936	1,248	33%
NORWAY	1,397	1,790	28%
NETHERLANDS	1,181	1,512	28%
FRANCE	4,074	5,212	28%
AUSTRIA	539	687	27%
SWITZERLAND	5,657	7,171	27%
DENMARK	706	894	27%
GERMANY	16,192	20,286	25%
BELGIUM	750	933	24%
ITALY	1,892	2,294	21%
FINLAND	412	486	18%

	2012	2022	CHANGE
MIDDLE EAST			
IRAQ	162	365	125%
UAE	828	1,270	53%
SAUDI ARABIA	1,298	1,917	49%
IRAN	235	349	49%
ISRAEL	309	437	41%

	2012	2022	CHANGE
AFRICA			
ZAMBIA	20	82	310%
UGANDA	20	81	305%
ZIMBABWE	16	61	281%
ALGERIA	34	111	226%
TANZANIA	118	329	179%
KENYA	142	248	75%
EGYPT	544	865	59%
NIGERIA	529	809	53%
SOUTH AFRICA	828	1,149	39%

Top 30 global cities by HNWI population

	2012	2022	Change
1 NEW YORK	7,580	10,306	36%
2 LONDON	6,015	8,202	24%
3 TOKYO	5,440	6,763	24%
4 SAN FRANCISCO	4,590	6,665	45%
5 LOS ANGELES	4,520	6,075	34%
6 BEIJING	2,285	5,262	130%
7 MUMBAI	2,105	4,988	137%
8 HONG KONG	3,205	4,780	49%
9 SAO PAULO	1,880	4,566	143%
10 RIO DE JANEIRO	1,740	4,285	146%
11 DELHI	1,945	4,278	120%
12 MEXICO CITY	2,585	3,901	51%
13 OSAKA	2,970	3,813	28%
14 SHANGHAI	1,415	3,704	162%
15 CHICAGO	2,615	3,689	41%
16 PARIS	2,860	3,672	28%
17 HOUSTON	2,295	3,397	48%
18 WASHINGTON DC	2,395	3,188	33%
19 DALLAS	2,020	2,927	45%
20 TORONTO	1,765	2,367	34%
21 ZURICH	1,805	2,333	29%
22 MUNICH	1,607	2,117	27%
23 SINGAPORE	1,345	1,930	43%
24 SYDNEY	1,405	1,925	37%
25 DUSSELDORF	1,420	1,872	32%
26 HAMBURG	1,370	1,788	32%
27 GENEVA	1,360	1,724	27%
28 MELBOURNE	1,150	1,621	41%
29 FRANKFURT	1,220	1,562	28%
30 ROME	1,130	1,351	20%

Challenging times

The Attitudes Survey also shows that HNWLs across the globe remain concerned about the possible impact of punitive tax policies. France plans to hit high earners with a tax rate of up to 75%, while countries including Spain and Ireland have also imposed wealth or property taxes.

Italy and Spain are the only countries where the number of billionaires is expected to fall over the next decade. The tax landscape is a key risk for wealth creation in the coming years. "There are different motivations behind some of the recent tax rises," Mr Rambus says. "In Hong Kong and Singapore, they are designed to address specific concerns – such as an overheating housing market.

In other countries, governments are searching for ways to repair their balance sheets. Coming down hard on the wealthy creates some 'political theatre.' The growing generation gap, in both developed and developing economies, poses another risk. Rising youth unemployment creates the prospect of a "lost generation" with no hope of the same levels of financial or social success as their parents and grandparents.

For former US Treasury Secretary Larry Summers, this is our most pressing long-term issue. **In Europe and the US, youth unemployment has risen sharply since the financial crisis. In Africa, it threatens to act as a drag on economic growth.** Around 60% of Africa's unemployed are aged between 15 and 24, and the rate of youth unemployment in North Africa is the highest in the world, according to the International Labour Organisation (ILO).

There is real impetus for policymakers to address this challenge. Economic growth in sub-Saharan African countries has been impressive in recent years, despite a slowdown in 2011 due to the political turmoil of the Arab Spring. Ethiopia, Nigeria, Ghana and Rwanda all posted GDP growth of between 6% and 8% last year, according to the latest estimates.

The number of young people in Africa is set to double by 2045, and harnessing their ability and skills is crucial to further bolster economic growth and to enable these fast-growing developing countries to realise their potential in terms of wealth creation.

However, it is a sign of the opportunities on offer within Africa that HNWL numbers are expected to double if not treble (albeit from relatively low bases) in a number of countries (p11), contributing to HNWL growth of 69% across the entire continent.

The economic crisis may have put the brakes on global wealth creation to some extent. But it is clear that the appetite to build wealth, particularly in ambitious, rapidly developing nations, remains as strong as ever.

ASIA PACIFIC FOCUS ON HEALTH

Wealth-X (wealthx.com)

ASIA	+119%	+88%	6,444
INDIA	+84%		
INDONESIA	+190%		
HONG KONG	+39%		
CHINA	+214%		

AUSTRALASIA	+10%	+35%	496
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-Increase in billionaires 2012-22(region)

- HNWL population % change 2012-22 (region)

- Total HNWL WEALTH (US\$bn)

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RUSSIA	102	126	24%
HONG KONG	70	97	39%
INDONESIA	31	90	190%
SWITZERLAND	63	75	19%

HNWI populations for selected countries

	2012	2022	Change
ASIA			
MYANMAR	39	307	687%
INDONESIA	1,029	5,161	402%
MONGOLIA	49	230	369%
CHINA	10,849	25,660	137%
CAMBODIA	54	112	107%
INDIA	8,481	17,032	101%
BANGLADESH	78	155	99%
SRI LANKA	64	120	88%
VIETNAM	186	344	85%
KAZAKHSTAN	135	244	81%
PHILIPPINES	662	1,079	63%
TAIWAN	1,181	1,871	58%
MALAYSIA	828	1,249	51%
THAILAND	681	1,018	49%
HONG KONG	3,206	4,778	49%
SOUTH KOREA	1,412	2,061	46%
SINGAPORE	1,343	1,932	44%
JAPAN	12,668	16,264	28%
PAKISTAN	368	446	21%
	2012	2022	Change
AUSTRALASIA			
AUSTRALIA	3,432	4,635	35%
NEW ZELAND	500	665	33%

Top 30 global cities by HNWI population

	2012	2022	Change
1 NEW YORK	7,580	10,306	36%
2 LONDON	6,015	8,202	24%
3 TOKYO	5,440	6,763	24%
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15 CHICAGO	2,615	3,689	41%
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17 HOUSTON	2,295	3,397	48%
18 WASHINGTON DC	2,395	3,188	33%
19 DALLAS	2,020	2,927	45%
20 TORONTO	1,765	2,367	34%
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29 FRANKFURT	1,220	1,562	28%
30 ROME	1,130	1,351	20%

Source:

The Wealth Report 2013 - Knight Frank Research





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Africa is Huge in Size and Need

AIn many developing countries, even basic medical care is a luxury. And in Africa, nearly 50 percent of the people have no access to a hospital or doctor.

Children, teens, adults and the elderly suffer and die every day from curable or treatable causes. Every year, 6 million vulnerable children die from preventable diseases such as malaria, diarrhea and pneumonia. One child in eight will die before age 5.

The challenge is enormous, but don't let the statistics numb you. Every number has a name, a face and a story. And they will break your heart. For more than 35 years, Mercy Ships and its committed partners and volunteers have followed the model of Jesus to bring hope and healing to the world's poor one life, one community and one nation at a time. Through free, basic, health-care and transformative surgeries, Mercy Ships becomes the face of love in action.

The world's largest non-governmental hospital ship - Africa Mercy - provides first-rate medical professionals, state-of-the-art medical and surgical facilities and health-care training to communities in West Africa that lack those critical services.



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More than 75% of the world's population lives within 100 miles of a port city.

Many of those cities are in developing countries where access to adequate health care is limited or nonexistent.

A ship is the most efficient platform to deliver a state-of-the-art hospital to those port cities.

Many nations lack basic infrastructure services such as a clean water supply, reliable delivery of electricity, and medical facilities and personnel.

A ship is a controlled, safe and clean environment ideally suited for serving patients and crew.

Volunteers and patients thrive onboard the *Africa Mercy* where their basic needs are met.

These are some of the free services provided through *Africa Mercy*:

- Transformational surgeries reduce the effects of neglected trauma, disease and congenital conditions.
- Dental care reduces the incidence of dental disease by providing education and treatment
- Eye care reduces the prevalence of blindness and poor vision due to cataracts.
- Training programs build the capacity of local professionals to serve for the long term.

Numbers that Count

Mercy Ships has delivered free services valued at more than \$1 billion.

Since 1978, that includes 67,000 surgeries and 572,00 patients treated in village clinics. In 2011, for example, Mercy Ships returned to Sierra Leone for its fifth visit in 20 years. During the port visit, the crew performed:

- 3,300 life-changing general surgeries
- More than 2,600 eye surgeries
- More than 34,700 dental treatment
- About 10,000 medical consultations

In addition, the crew trained more than 450 local health-care professionals in anesthesiology, orthopedic and reconstructive surgery, midwifery and eye surgery.

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The ability to regenerate tissues and organs is a topic of great scientific, social and ethical interest.

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From years Silfradent deals with the study of platelet concentrates and, in particular, with CGF (Concentrated Growth Factors) that represents a new generation of platelet concentrates able to hold inside a higher concentration of autologous growth factors.

CGF, like other platelet concentrates, is isolated from blood samples through a simple and standardized separation protocol, which is performed by a specific centrifuge device (Medifuge MF200, Silfradent srl, Forlì, Italy) without the addition of exogenous substances.



A study made in the "Laboratory of Organ and Tissue Regeneration", headed by Professor Luigi F. Rodella of the Section of Human Anatomy, Department of Biomedical Sciences and Biotechnologies of the University of Brescia and published in the international journal "Microscopy Research and Technique" has highlighted some of its main features: the CGF consists of an organic matrix rich in fibrin that is able to "trap" a greater amount of growth factors (TGF- β 1 and VEGF); moreover, it contains CD34 positive stem cells, which are known to be recruited from blood to injured tissue and play a role in vascular maintenance, neovascularisation and angiogenesis.¹ In addition, an other study underlined the need to establish a standardized protocol for preparing CGF (also said PRF-Platelet Rich Fibrin) membranes for clinical use.²

Form a clinical point of view, some recent studies about the use of CGF in maxillofacial surgery showed the efficacy of CGF in guided bone regeneration before dental implant placement.³⁻⁵ In particular, there are satisfying results about the use of CGF as alternative to bone substitutes for sinus augmentation.^{4,5} However, its features make it suitable for its use, alone or with other biomaterials, in other fields where tissue regeneration and remodelling is required. To date, the research continue and is addressed to evaluate "in vitro" the ability of CGF of stimulate cellular proliferation and to test the efficacy of CGF in different clinical applications ranging from oral surgery, dermatology and cosmetic surgery.

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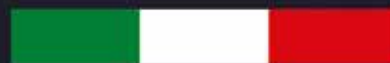
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October

• • 01-03/10/2013

WIHE 2013- Warsaw International Healthcare Exhibition

(Warsaw – Poland)

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01-015 Warsaw, Poland

Tel: +48 22 395 66 99

Fax: +48 22 395 66 90

E-mail: info@lentewenc.com

Website: www.lentewenc.com

Venue: Expocentre EXPO XXI

12/14 Ignacego Prądzyńskiego Street

01-222 Warsaw, Poland

<http://http://hospital.lentewenc.com/polish-medical-market-overview>

• • 02-03/10/2013

Medtec Italy 2013

(Modena – Italy)

Organized by: UBM Canon



Friedrich-Karl-Str. 260 c

50735 Koln

Germany

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Tel: +39 075 900 6422

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Contact person: Mr Enrico Vaiani

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E-mail: enrico.vaiani@ubm.com

Venue: Modena Fiere

Viale Virgilio, 70/90

41123 Modena – Italy

www.medtec-italy.com

• • 03-05/10/2013

Medical Myanmar 2013

(Yangon – Myanmar)

Fireworks Event (M) Sdn Bhd

11-3, Jalan PJU 5 /12, Dataran Sunway,

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Petaling Jaya, Selangor D.E.

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Email: my@asiafireworks.com

Email: myanmar@asiafireworks.com

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Contact Person: Ms Amanda Wong

E-mail: amanda@asiafireworks.com

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- **Li-ion battery** - Std - 1Pack : 1.5hr
Opt - 2Pack : 3hr

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October

• • 08-10/10/2013 Medtrade 2013

(Orlando FL - USA)



Medtrade

Show President: Kevin Gaffney

Tel: 800 241 9034 x 5446 or +1 770 291 5446

Email: kevin.gaffney@nielsen.com

Marketing Manager: Sarah Varner

Tel: 800 241 9034 x 5457 or +1 770 291 5457

Email: sarah.varner@nielsen.com

Venue: Orange County Convention Center

Orlando FL - USA

www.medtrade.com

Infomedix stand number: 780

• • 23-25/10/2013 Hospex Japan 2013

(Tokyo - Japan)

Organized by: Healthcare Engineering

Association of Japan

Japan Management Association

- The Secretariat of HOSPEX Japan

Tel: +81 3 3434 1988

Venue: Tokyo Big Sight

Add: 3-21-1 Ariake, Koto-ku

Tokyo - Japan

www.jma.or.jp/hospex/en/index.html

November

• • 03-06/11/2013 CMEF Autumn 2013 - The 70th China International Medicinal Equipment Fair

(Xiamen - China)



Organized by: Reed Sinopharm Exhibitions Co., Ltd

15th Floor, Tower B, Ping An International Finance Center I-3, Xinyuan South Road Chaoyang District

Beijing, China 100027

Contact Person: Mr Gu Ying

Tel: +86 10 84556603

Fax: +86 10 82022922

Email: yiqi.fan@reedsinopharm.com

Venue: Xiamen International Convention & Exhibition Center

• • 20-23/11/2013 MEDICA and COMPAMED 2013

(Dusseldorf - Germany)



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Tel: +49 (0) 211 45 60 01

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Website: www.messe-duesseldorf.de

Show Venue:

Duesseldorf Trade Fair Centre

Messeplatz

40474 Duesseldorf

www.medica-tradefair.com

Infomedix stand number: 16C44

December

•• 01-06/12/2013 **RSNA 2013**



(Chicago, IL – USA)

Radiological Society of North America

820 Jorie Boulevard, Oak Brook

IL 60523-2251, USA

Tel.: +1 630 571 2670

Fax: +1 630 571 7837

Registration e-mail: reginfo@rsna.org

Exhibition e-mail: exhibits@rsna.org

Venue: McCormick Place, Chicago, IL

www.rsna.org

Infomedix booth: North Building - Hall B: 6509

•• 09-13/12/2013 **Zdravookhrameniye 2013- 22nd International Exhibition for Health Care, Medical Engineering and Pharmaceuticals**



(Moscow – Russia)

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E-mail: makushkina@expocentr.ru

Venue: Expocentre

www.zdravo-expo.ru/en/

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January

•• 27-30/01/2014

Arab Health 2014

(Dubai - United Arab Emirates)



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Have you enjoyed reading Infomedix International?
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December...don't miss it!

Infomedix International 1/2014 Asia & Middle East Issue



Publishing Date: December 2013

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Some of the Upcoming Contents:

- **Focus on India**
- **Outlook on Taiwan**
- **Business Opportunities**

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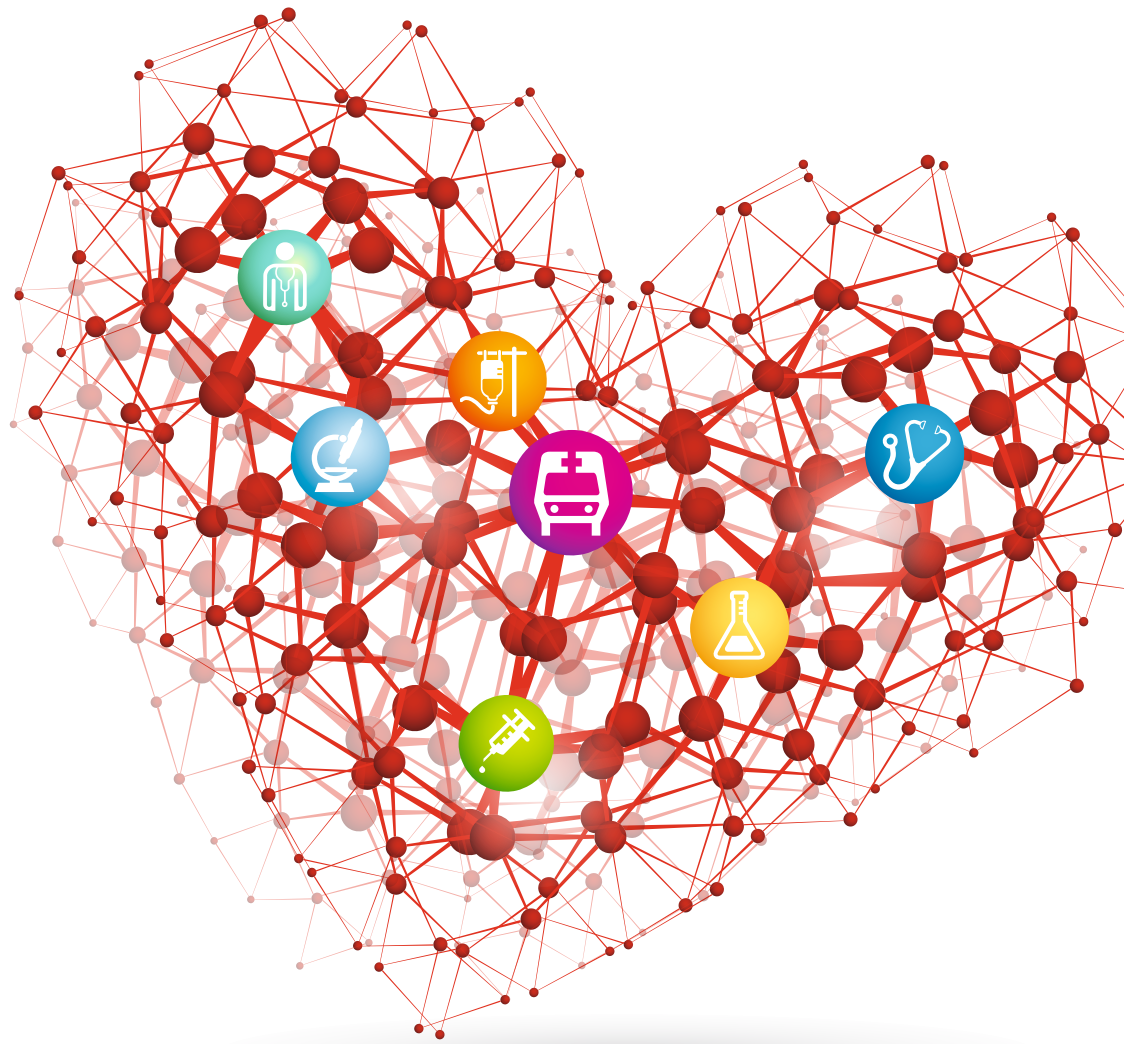
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