

Russian market of defibrillators in 2012-2014

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Abstracts

The global market of defibrillators is characterized by steady growth. The compound annual growth rate (CAGR) of the global market of defibrillators for the 2006-2013 period was 5.3%, which is above the average for the medical device market as a whole, 5.0%. The size of the global market of defibrillators in 2013 was about USD 1.5 bln. It is expected to keep expanding by approximately 5.9% a year and reach USD 2.2 bln. by 2020. The North American and Asia Pacific markets are expected to grow the fastest.

In 2013 the Russian market of defibrillators was about 2% of the global.

In 2012 the Russian market of defibrillators was worth USD 29.9 mln. In 2013 the market shrank slightly down to USD 26.5 mln. In the first half of 2014 there was a similar reduction. The six-months market amounted to USD 9.8 mln.

Public procurement dominates the Russian market of defibrillators. The private sector's contribution to market value is small. In 2012-2013 it was only 5%. In the first half of 2014 its share doubled. Looking at the value of imported and Russian defibrillators on the country's market, we see a 90% predominance of imports in 2012 and 2013. This receded to some 80% in the first half of 2014.

REPORT SCOPE. The report provides full information about the Russian market of defibrillators in 2012 – the 1st half of 2014 and general background information on the global market of defibrillators. It also contains a forecast of the Russian market of defibrillators till 2018.

REPORT INCLUDES THE FOLLOWING PARTS:

“STUDY METHODOLOGY” section includes a list of information sources, which were used while preparing the report. It also describes what kinds of defibrillators were the

subject of the research.

“INTRODUCTION” section clarifies the structure of the report. It is explained what defibrillators are and in what situations they are used.

The first part of the report (“RUSSIAN MEDICAL DEVICE MARKET IN 2013-2018”) encompasses the most important characteristics of the Russian medical device market. It contains information about its dynamics and structure, public procurement and import-export operations. The most important Russian medical device market trends and significant factors, determining its current state, are outlined. This part also includes a forecast of the Russian medical device market development until 2018. Based on the analysis of drivers and barriers for the market growth, two possible scenarios of market development are presented.

The second part (“THE GLOBAL AND RUSSIAN MARKETS OF DEFIBRILLATORS IN 2012-1ST HALF OF 2014”) provides information about the dynamics and structure of the global market of defibrillators. It also includes data on the main market players both worldwide and in Russia. Finally, key characteristics of the Russian market of defibrillators are outlined.

The third part (“SALES OF DEFIBRILLATORS BY MANUFACTURER”) includes a classification of all defibrillators purchased by Russian public buyers in the following breakdown: “Manufacturer – Trademarks of defibrillators – Presence of a monitor”. Additionally, this section contains data on sales of different defibrillators’ manufacturers operating in Russia.

The fourth part (“IMPORTS AND EXPORTS OF DEFIBRILLATORS”) encompasses data on import-export operations of defibrillators. Import information includes annual and quarterly dynamics of imports, the structure of imports by countries of origin and manufacturers. Besides, Top-20 recipients of imported defibrillators at customs are named. Finally, it includes a list of the largest recipients of defibrillators by leading manufacturers at customs. Export information contains annual dynamics of defibrillators exports and a list of the largest Russian exporters.

The fifth part (“PUBLIC PROCUREMENT OF DEFIBRILLATORS”) is dedicated to the results of defibrillators public procurement analysis. It includes data on the dynamics and structure of public procurement of different types of defibrillators. The largest purchasers of defibrillators in monetary and physical terms are presented. A list of public buyers of the highest-priced defibrillators is provided. It also contains a list of the

biggest suppliers of defibrillators under government contracts in monetary and physical terms. Moreover, this section provides information about Russian regions, which are the leaders in defibrillators public procurement purchasing.

The sixth part ("DEFIBRILLATORS SALES REVIEW") is a price review of defibrillators purchased under government contracts. Average prices of different kinds of defibrillators (incl. federal district breakdown) are shown. Besides, minimum, maximum and weighted average prices of Top-15 defibrillators purchased under government contracts are provided.

The seventh part ("FORECAST FOR THE RUSSIAN MARKET OF DEFIBRILLATORS TO 2018") dedicated to an overlook of the future perspectives of the Russian market of defibrillators. Based on the analysis of drivers and barriers for the market growth, two scenarios of market development are presented.

The eighth part ("BUSINESS ENVIRONMENT IN RUSSIA") provides a practical guide to what is necessary for achieving compliance with Russia's regulatory requirements. It also describes Russian policies on health care system and medical device market development.

SOURCES OF INFORMATION

THE PUBLIC PROCUREMENT OF MEDICAL DEVICES DATABASE: MDpro's database on public (government and municipal) procurement of medical devices and expendables for medical facilities. Updated every month using information from www.zakupki.gov.ru, processed for details and broken down by segment of the medical device market.

THE EXPORTS AND IMPORTS DATABASE: MDpro's database of customs transactions for medical devices and expendables. Updated every month using official statistics from customs, processed for details and broken down by segment of the medical device market.

OPEN SOURCES: Official health care statistics

Publications of international marketing agencies

News Companies' official reports.

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