

Russian Market of Bedside Monitors in 2012-2014

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Abstracts

The global market of bedside monitors is characterized by steady growth. The compound annual growth rate (CAGR) of the global market of bedside monitors for the 2006-2013 period was 3.1%. The segment continues to grow, although not as quickly as the market of medical devices generally with its CAGR 5.0%. The global market of bedside monitors is expected to keep expanding by approximately 3.9% a year and reach USD 4.1 bln. by 2020.

The Russian market of bedside monitors takes 3% of the global market of bedside monitors. In 2011-2013 regional modernization programs for Russia's public health care system sharply accelerated consumption of bedside monitors in the country, to RUB 5.1 bln. in 2012. The programs' expiration lead to a collapse of the Russian market in the middle of 2013, 43% down from the previous benchmark. It continued to decline in the 1st half of 2014. In fact, the level of consumption that would normally have been reached in 2012-2015 was achieved in 2011-2012, the year most bedside monitors were obtained on program money.

Public procurement dominates the Russian market of bedside monitors. The private sector's contribution to market value is small. In 2012 it was only 5%. In 2013, with demand from public buyers contracted, private customers made few advances, their share was 7%. In the first half of 2014 it dwindled to 1%.

REPORT SCOPE. The report provides full information about the Russian market of bedside monitors in 2012 – the 1st half of 2014 and general background information on the global market of bedside monitors. It also contains a forecast for the Russian market of bedside monitors 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 explains what kinds of bedside monitors were the subject of the research.

“INTRODUCTION” section clarifies the structure of the report. Attention is drawn to the absence of one commonly accepted classification of bedside monitors. MDpro’s own classifications are given.

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 BEDSIDE MONITORS IN 2012-1ST HALF OF 2014”) provides information about the dynamics and structure of the global market of bedside monitors. It also includes data on the main market players both worldwide and in Russia. Finally, key characteristics of the Russian market of bedside monitors are outlined.

The third part (“SALES OF BEDSIDE MONITORS OF SPECIFIC MANUFACTURERS”) includes a classification of all bedside monitors purchased by Russian public buyers by four parameters: mobility, patient age, type and grade (number of channels). Additionally, this section contains information about best-selling models of bedside monitors and sales figures of leading manufacturers on the Russian market.

The fourth part (“IMPORTS AND EXPORTS OF BEDSIDE MONITORS ON THE RUSSIAN MARKET”) encompasses data on import-export operations of bedside monitors. 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 bedside monitors at customs are named. Finally, it includes a list of the largest recipients of bedside monitors by leading manufacturers at customs. Export information contains annual dynamics of bedside monitors exports and a list of the largest Russian exporters.

The fifth part (“PUBLIC PROCUREMENT OF BEDSIDE MONITORS”) is dedicated to the results of bedside monitors public procurement analysis. It includes data on the dynamics and structure of public procurement of different types of bedside monitors. The largest purchasers of bedside monitors in monetary and physical terms are presented. A list of public buyers of the highest-priced bedside monitors is provided. It also contains a list of the biggest suppliers of bedside monitors under government contracts in monetary and physical terms. Moreover, this section provides information about Russian regions, which are the leaders in bedside monitors public procurement purchasing.

The sixth part (“PRICING OF BEDSIDE MONITORS”) is a price review of bedside monitors purchased under government contracts. Average prices of different kinds of bedside monitors (incl. federal district breakdown) are shown. Besides, minimum, maximum and weighted average prices of Top-15 bedside monitors purchased under government contracts are provided.

The seventh part (“FORECAST FOR THE RUSSIAN MARKET OF BEDSIDE MONITORS TO 2018”) dedicated to an overlook of the future perspectives of the Russian market of bedside monitors. 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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