

# Russian Medical Device Market in 2013

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## Abstracts

The global medical device market has been growing steadily over the last years, expanding by 5% between 2009 and 2013. The Russian medical market grew by 12% in the same period, and in absolute terms is now the 14th-largest in the world.

In the 2011-2012 period consumption of medical products in the country increased substantially as a result of regional programs to modernize health care. Equipment that would have been purchased in 2012-2015 at the natural rate of consumption growth was in fact bought in 2011-2012. The oversaturated market of that period deflated appropriately in 2013 – in certain segments demand collapsed to a 40-50% of the 2012 level. The largest segments of Russian medical device market were “In vitro diagnostic medical devices” and “Surgery medical devices”.

As equipment sales were dropping in 2013, medical centers' budgets began to be redistributed towards maintenance of existing equipment (repair and expendables).

Even though the regional modernization programs have run their course, public procurement remains a key factor of consumption. Public contracts accounted for more than 72% of the market. Most of the demand was still answered with imported products, which made up 86% of all sales in 2013. In the same year exports of domestic medical products decreased significantly.

**REPORT SCOPE.** The report provides complete information about the Russian medical device market in 2013 and general background information on the global medical device market. It also contains a forecast for the Russian medical device market 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 contains the structure of data, which served as a basis for the report. Additionally, core procedures of data processing and data analysis are described.

“OVERVIEW” section is a review of the key findings from the report.

The first part of the report (“THE GLOBAL AND RUSSIAN MARKETS OF MEDICAL DEVICES IN 2009-2013”) encompasses the most important characteristics of the global medical device market: its dynamics and structure, information about the largest manufacturers. Besides, it includes the main parameters of the Russian medical device market.

The second part (“MAIN STATISTICS FOR THE RUSSIAN MEDICAL DEVICE MARKET IN 2013”) includes a very detailed and comprehensive analysis of the Russian medical device market in 2013. It contains information about its monthly dynamics and structure, 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 Russian medical device market development until 2018. Based on the analysis of drivers and barriers for the market growth, two possible scenarios for market development are presented. Moreover, this section contains a forecast of consumption of the following types of medical devices: “Medical imaging devices”, “In vitro diagnostic devices”, “Minimally invasive surgical devices”, “Resuscitation devices and emergency medicine devices”, “Orthopedic medical devices”.

The third part (“PUBLIC PROCUREMENT OF MEDICAL DEVICES IN 2013”) is dedicated to the results of Russian medical devices public procurement analysis. It includes data on monthly dynamics of medical devices public procurement (incl. segments breakdown) and detailed structure of public procurement. The largest purchasers of different types of medical devices are named. Besides, this section includes a list of leading suppliers of medical devices under government contracts, their clients (public healthcare institutions), regions of supply, and the structure of supply (by types of medical devices). It also contains information about the biggest suppliers of medical devices in each federal district (by types of medical devices).

The fourth part (“IMPORTS OF MEDICAL DEVICES TO RUSSIA”) encompasses data on the structure and dynamics of medical devices imports to Russia in 2013. Data are provided in breakdown by types of medical devices and manufacturing countries. A list of the largest medical devices importers is included. Moreover, it contains information

about the structure of certain types of medical devices' imports.

The fifth part ("EXPORTS OF MEDICAL DEVICES FROM RUSSIA") includes data on the structure and dynamics of medical devices exports from Russia in 2013. It also provides information about the major exporters of Russian medical devices.

The sixth 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](http://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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