Russian Medical Devices Market: Investment Opportunities, Growth Forecasts by Care Areas and Local Competitive Landscape (2015-2018)

Description: The purpose of the report is to analyze the key opportunities and investment areas for medical devices in Russia, despite the ongoing economic slowdown. With data gathered through in-depth primary research with various local and global medical device manufacturers as well as distributors, the report provides an in-depth understanding of the Russian medical device market from 2015-2018 by care areas. In addition to detailed market metrics and growth forecasts for over 30 medical device product categories, the report analyzes the key opportunity areas for foreign investors in Russian medical device market. The report is relevant for key stakeholders and decision makers in medical device organizations, venture capital and private equity firms; strategy consulting firms; as well as government, trade and commerce organizations.

Key Highlights and Questions Answered in the Report

In the period between 2010 and 2013, the Russian government had made significant progress in creating a favorable business environment for foreign investors. With policies around tax and custom concessions, IP protection, and creation of industrial parks; FDI in Russia grew by 83% in 2013. This had prompted various medical device manufacturers to look at localization of medical device production in Russia. However with the Ukraine crisis, there has been a negative perception within various industries towards doing business in Russia. With capital flight and trade restriction imposed on the country, the business environment has changed significantly for most industries including medical devices.

- How is the current political, economic, social and technological environment in Russia for foreign investors?
- What are the implications of restriction on imported medical device manufacturers in public tenders?
- What is the silver lining for foreign investors looking to do business in Russia in the near future?

Despite the improvements in healthcare policies in the past 5 years, healthcare remains largely inaccessible to rural areas. With a large proportion of medical devices being functional without maintenance contracts, the throughput and overall usage in public hospitals is being negatively impacted. While the private healthcare sector was growing at about 12% per year, the recent economic slowdown is likely to impact the flow of foreign investments into this sector.

- What are the various types of hospitals and healthcare facilities across Russia?
- What is the installed base of selected diagnostic imaging modalities in the country?
- What are the key opportunities for medical device manufacturers by disease areas including cardiovascular, renal, cancer and other disease types?
- What are the key opportunities in the Russian private health sector for various healthcare service providers?
- What are the trends in public and private health insurance in Russia?

With over 77% of the medical device consumption being dependent on imports, Russia has been looking to reduce its reliance on foreign manufacturers. As the government adopts pro-domestic manufacturer policies especially for public hospital tenders, there would be additional ramifications for multinational firms. Localization strategies adopted by MNCs for production of medical devices within Russia may also be impacted by the current economic downturn.

- What is the current market size for medical devices by various product categories?
- How will the market projections be impacted by the current economic slowdown and restrictions on imported devices?
- What are the opportunities for medical device manufacturers by various care areas including cardiology, critical care, operating room, diagnostic radiology, orthopedics, dialysis etc.?
- What are the key opportunities for manufacturers of diagnostic imaging equipment?
- What are the key differentiators for individual product categories being consumed across various care areas in Russia?
- What are the purchase criteria for medical devices in public hospitals?
- What are the current guidelines for medical device registration in Russia?
With over 1000 local manufacturers of medical devices, the Russian market for medical devices is fragmented for various product categories. Certain medical device manufacturers are looking to counter the current import restrictions by weighing localization strategies. Several global manufacturers have been looking to improve market penetration through strategic partnership with local dealers and small device manufactures.

- Who are the key global manufacturers of medical devices operating in Russia?
- Who are the key local medical device manufacturers?
- What are the key hospital dynamics and new hospital launches in 2014-2015?
- What are the various healthcare policies from 2014-2015 that are likely to impact the medical device market in Russia?
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