

Medical Devices In ASEAN

Market Overview

Keys for entering in the ASEAN market

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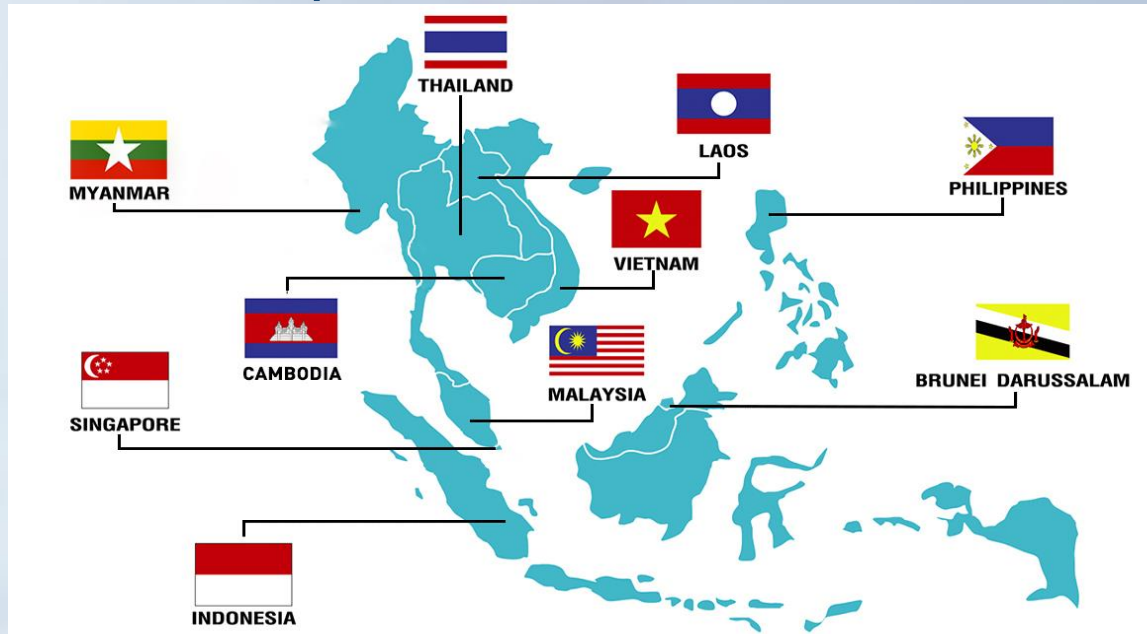
Topics for Presentation

- What is the ASEAN?
- Issues on entering the ASEAN markets.
- Larger regional markets.
- Emerging markets.



What is ASEAN?

- Association of Southeast Asian Nations
- A political and economic community composed of 10 countries
- Goal: To accelerate the economic growth, social progress and cultural development





What is the ASEAN?

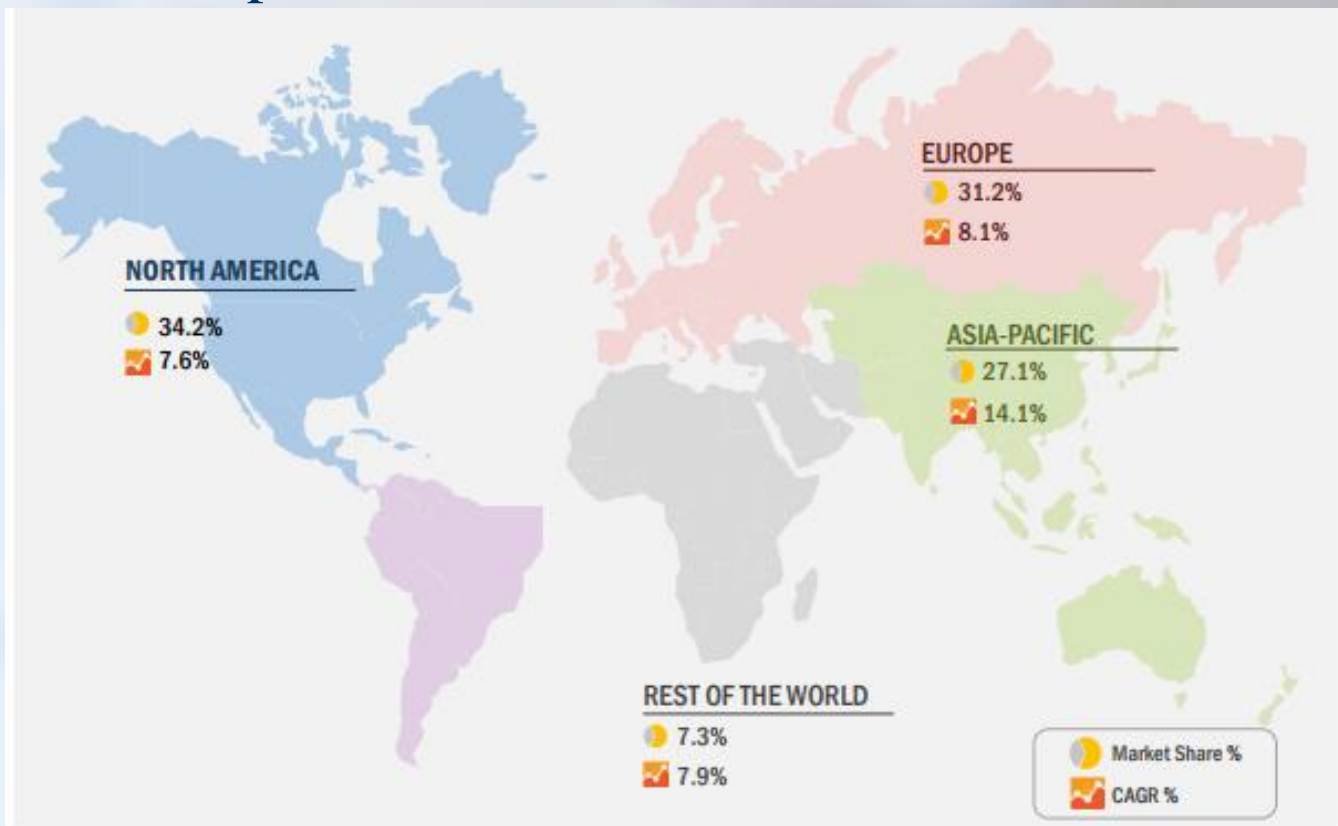
■ Members

	Population (million hab.)	GDP/hab \$	GDP Growth	Life Expectancy	Human Development Index
Singapore	5.7	52,900	2%	82.70	0.925
Brunei	0.44	30,500	-0.57%	78.81	0.865
Malaysia	31.9	9,768	5%	74.9	0.789
Thailand	68.2	5,816	2.82%	74.42	0.740
Indonesia	265.1	3,347	4.8%	70.73	0.691
Vietnam	92.7	2,110	6.68%	73.16	0.683
Philippines	102.8	2,899	5.81%	68.27	0.682
Laos	6.6	1,812	7.56%	63.5	0.586
Cambodia	15.2	1,040	7%	63.78	0.563
Myanmar	52.8	1,204	6.99%	66.8	0.556



Why invest in ASEAN countries?

ASEAN and ASIA represent 1/3 of the market share of medical devices





Why invest in Western Europe?

A huge market with high level of health expenditure!

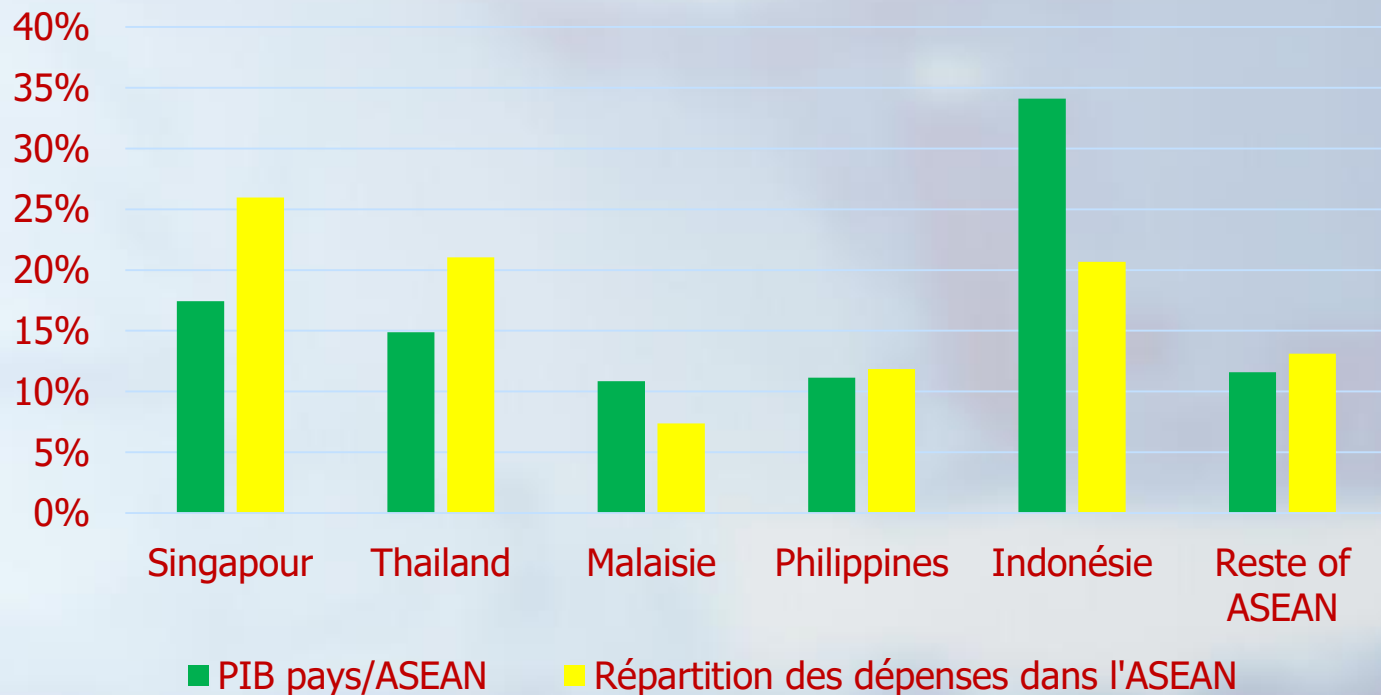
Health	expenditure,	total	(% of GDP)
Austria	11%	China	5,6%
Belgium	11,2%	Indonesia	3,1%
Denmark	10,6%	Malaysia	4,0%
France	11,7%	Vietnam	6,0%
Germany	11,3%	Thailand	4,6%
Italy	9,1%	Philippines	4,4%
Switzerland	11,5%	Singapore	4,6%



Opportunities Upon Entering the ASEAN countries

- Growing population, vigorous economies
- Countries focused on medical development
- Positive image of European products

GDP level and health expenditures in ASEAN





Opportunities Upon Entering the ASEAN markets

The region's medical device market is expected to grow strongly and access to the market will improve in the coming years due to a number of factors:

- Size of middle class in the region is rapidly expanding. Asian Development Bank expects this group to grow from 24% of the total population in 2010 to 65% by 2030. Additionally, demographic trends such as population aging and urbanisation, is expected to fuel demand for better quality healthcare, and contribute to the expansion of Southeast Asia's medical device market.
- Penetration of medical devices into ASEAN is still relatively low, thus, there is much room for growth and market expansion. The heterogeneity of the ASEAN market allows medical device companies to adopt different market strategies and provides ample room for device segmentation
- Another important consideration for medical device companies entering the ASEAN market is the lack of domestic competition in the region. Overall, ASEAN is a net importer of medical devices. Vietnam for example, currently imports 90% of all the medical devices used in the country.



Issues Upon Entering the ASEAN markets

ASEAN REGULATORY STANDARDS FOR MEDICAL DEVICES

- One of the greatest difficulties for foreign device firms in ASEAN has been the unpredictable regulatory environment. For instance, each country often has different — or no — regulations for post-market surveillance, quality control and product registration.

Price Sensitive countries:

- Some countries are really price sensitive

Cultural differences:

- Can be a challenge for European companies



Why you should choose us?

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- Management expertise
- Specialized in Strategic & Operational Marketing & Sales
- Multilingual and multicultural skills
- Business Innovation Coach for H2020 EU program
- Member of Business Angel Association
- Network of + 1000 companies actives in health care
- +25 years of experience in life sciences
- Located in the capital of Europe and in the heart of **European lobbys** and **Professional associations** (EDMA, EFPIA, EAEPEC, EUCOMED, EAMDR, MEDTECH Europe)...



Thanks to our network of technical marketing expertise and sales in the area of health, life sciences and biotechnology, medical devices, agri-food and cosmetics., we can assist you in establishing relevant contacts with professionals interested in your activity.





Contact us



Stratex Consulting
www.stratex.be
www.stratex-europe.com

Olivier.raimond@stratex.be
contact@stratex.be

Belgium : +32 476.511.990

France : +33.6.23.49.57.34

Thailand : +66.9.25.09.71.42

Indonesia : +62.8.22.47.35.67.56

Singapore: +65.81.36.98.70

Skype : stratolirai



Stratex Consulting
Rue de Scourmont, 45
5140 - Sombreffe
Belgium

Stratex Consulting
Jalan Pahlawan RT 003
15412 - Jakarta
Indonesia

