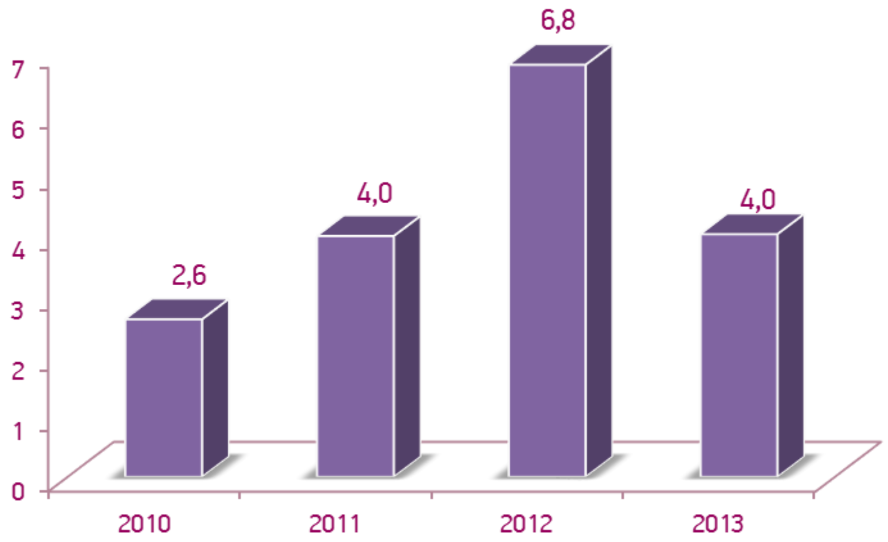
Russian Market of Artificial Lung Ventilation Devices
2013-2014

Summary

The global market of artificial lung ventilation (ALV) devices is characterized by steady incremental growth. The compound annual growth rate (CAGR) of the global ALV devices market for the 2006-2013 period was 4.0%, which is somewhat under than the average figure for the medical device market as a whole, 5.0%. The global ALV devices market is expected to grow by 4.4% a year on average towards USD 1333 mln. in 2020.

The Russian market of ALV devices grew quickly in the 2009-2012 period. Regional health care modernization programs of 2011-2013 significantly broadened the field – to RUB 6.8 bln. in 2012. This was 1.7 times the 2011 market size. With the regional programs over by the middle of 2013, demand in 2013-2014 shifted from new devices to expendables and support of existing unit pools. In fact, the level of consumption that would normally have been reached in 2014-2015 was achieved in 2012, the year most ALV units were obtained on program money. As a result, in 2013 the Russian market of new ALV units fell by more than 40% to 2011 levels. It continued to decline in the 1st half of 2014.



The dynamics of Russian ALV devices market (billion rubles), 2010-2013

Source of information: MDpro

Public procurement dominates the Russian market of ALV devices. Private buyers in 2013 only had a 10-16% presence, in the first half of 2014 – about 20-25% because of the retreat of public clients.

Report Description

Report scope. The report provides full information about the Russian ALV devices market in 2013 – the 1st half of 2014 and general background information on the global ALV devices market. It also contains a forecast of the Russian ALV devices market development till 2018.

The total number of pages – 68.

Report includes the following parts:

"Study methodology" section includes a list of information resources, which were used while preparing the report. It also contains description of ALV devices under study.

"Introduction" section clarifies the structure of the report. Attention is drawn to the absence of one generally accepted classification of ALV devices. MDpro's own classification of ALV devices is 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 ALV devices in 2011-2014")* provides information about the dynamics and structure of the global respiratory care devices market and ALV devices market as its subsegment. It also includes data on the main market players and the biggest M&A deals between companies operating on the global ALV devices market. Finally, key characteristics of Russian ALV devices market are outlined.

The third part *("Sales of ALV devices by manufacturer")* includes a list of the world's largest manufacturers of ALV devices in the following breakdown: "Manufacturer – Trademarks of ALV devices – Images of ALV devices"). MDpro's classification of ALV devices, presented on the Russian public procurement market, is provided. Additionally, this section contains data on sales of different ALV devices' manufacturers operating in Russia.

The fourth part *("Imports and exports of ALV devices")* encompasses data on import-export operations of ALV devices. Import information includes annual and quarterly dynamics of imports, the structure of imports by manufacturing countries and companies. Besides, Top-20 recipients of imported ALV devices at customs are named. Finally, it includes a list of the largest recipients of ALV devices by leading manufacturers at customs. Export information contains annual dynamics of ALV devices exports and information about industry leaders.

The fifth part *("Public procurement of ALV devices")* is dedicated to the results of ALV devices public procurement analysis. It includes data on the dynamics and structure of public procurement of ALV devices and the most important trends in this area. The largest purchasers of ALV devices in monetary and physical terms are presented. A list of public healthcare institutions, which purchased the most expensive ALV devices, is shown. It also contains a list of the biggest suppliers of ALV devices under government contracts in monetary and physical terms. Moreover, this section provides information about Russian regions, which are the leaders in ALV devices public procurement purchasing.

The sixth part *("ALV devices sales review")* is a price review of ALV devices purchased under government contracts. The dynamics of prices of different ALV devices (incl. federal district breakdown) and average prices are shown. Besides, minimum, maximum and weighted average prices of Top-15 ALV devices purchased under government contracts are provided.

The seventh part *("Forecast of the Russian market of ALV devices to 2018")* dedicated to an overlook of the future perspectives of Russian ALV market. Based on the analysis of drivers and barriers for the market growth, two scenarios for market development are presented.

The eighth part *("Reference: ALV device usage and application statistics")* is designed to provide information about essential aspects of ALV devices circulation in Russia: Russian medical devices legislation, fields of application, indications for use, ALV devices equipment hospital standards, etc.

The ninth 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

To conduct the research study three types of data were used:

- ✓ Data on public procurement of medical devices, which are gathered by MDpro specialists from an official public procurement website (www.zakupki.gov.ru) on a monthly basis
- ✓ Data on export-import operations, which are formed by MDpro specialists from customs statistics on a monthly basis
- ✓ Open information sources:
  - Russian healthcare statistics;
  - Publications of international market research agencies;
  - Companies' reports;
  - News, etc.

Contents

List of Figures

List of Tables