

UK
TRADE &
INVESTMENT



**How UKTI can assist you to internationalise
your business.**

MediWales. Cardiff 3rd July 2012

Kevin Wilson

UKTI Sector Specialist. Healthcare and Medical Technology

UKTI's realignment

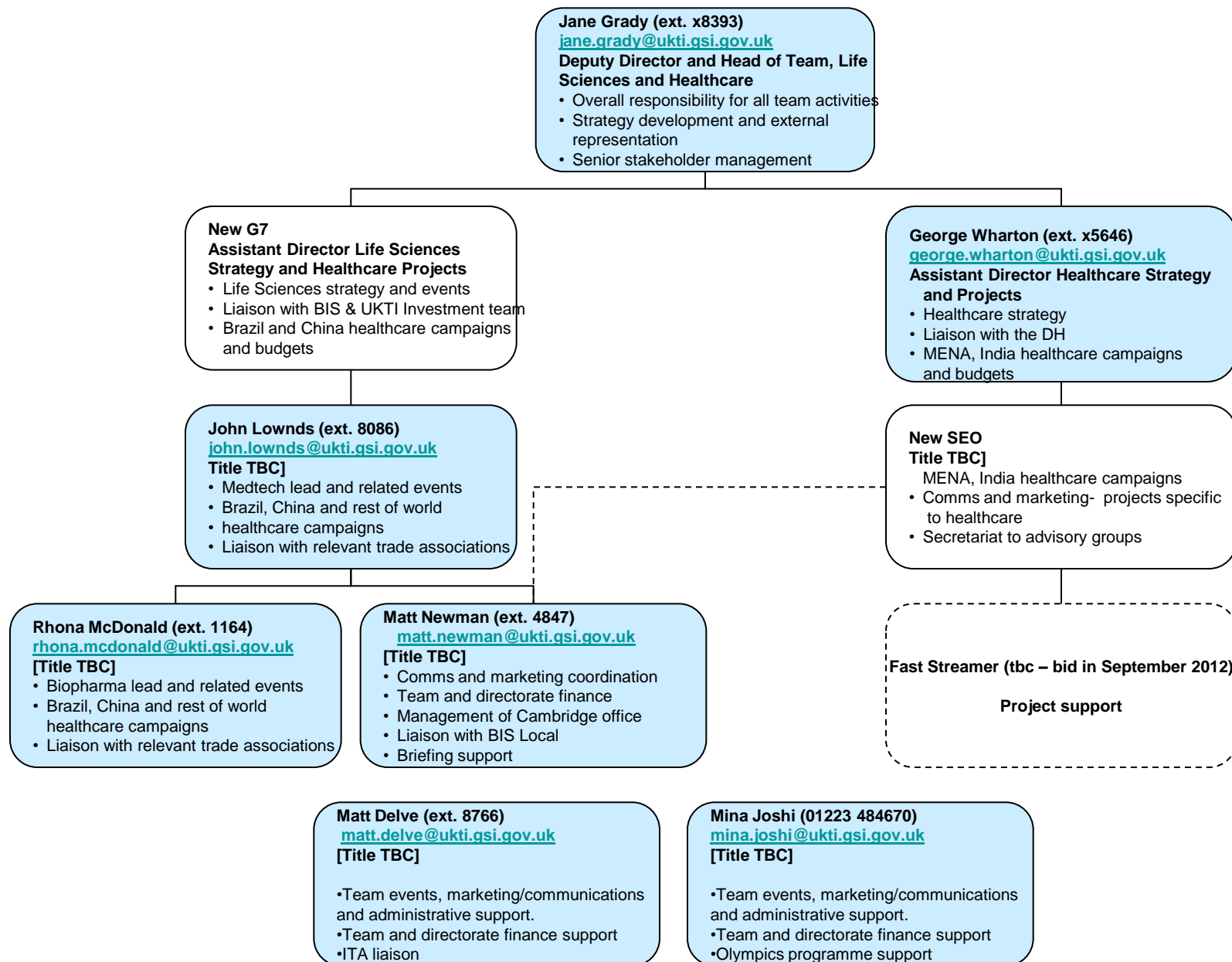
We are sharpening our delivery focus by realigning our organisation around the four pathways to growth set out in our strategy:

1. Helping more SMEs break into export markets: **Trade SMEs Group**
2. Bringing high value opportunities home for UK companies: **Strategic Trade Group**
3. Sustaining a pipeline of high quality investment for the UK: **Investment Group**
4. Building strategic relationships with the most significant investors and exporters: **Strategic Relationship Management Group**

We are realigning the organisation to:

- ensure the best possible delivery of the four pathways to growth;
- ensure better coordination and distribution of resources;
- make it easier for customers to interact with UKTI;
- and ensure accountability for each pathway, especially at senior level.

Healthcare and Life Sciences Team



UKTI Support

- [WWW.ukti.gov.uk](http://www.ukti.gov.uk) **TEN KEY STEPS**
- [1. Review your export potential](#)
- [2. Develop an action plan](#)
- [3. Research and prepare to visit the market](#)
- [4. Explore routes to market entry](#)
- [5. Find out about selling and marketing your product overseas](#)
- [6. Think about cultural and linguistic challenges](#)
- [7. Prepare to manage finance, payment and risk](#)
- [8. Prepare to protect your intellectual property](#)
- [9. Prepare to fulfil your orders and get your documentation right](#)
- [10. Choose your distribution, shipping and delivery methods](#)

UKTI Support

- **Passport to Export**
- UKTI's Passport to Export Service assesses a company's readiness for international business, and helps it build international trade capacity.
- **Gateway to Global Growth**
- Gateway to Global Growth is a service for experienced exporters which offers a 12 month programme of strategic support tailored to your needs to help grow your company's business overseas. Solutions could be complex, requiring both UK Trade & Investment services and those offered by other public or private sector organisations. Gateway is designed to help you achieve your objectives in a number of ways.
- Gateway to Global Growth is a UKTI service which helps exporters diversify into new markets
- **OMIS** Overseas Market Introduction Service
- **TAPS + SOLO Funding**

UKTI Support



Spain – Disposable Healthcare Products

Opportunity to establish relationship with Spanish distributor of disposable healthcare products.

This full online edition with links is available at:

<http://www.ukti.gov.uk/uktihome/item/328360.html>

Pharma & Healthcare Top 10 trade countries by Value.

PA Consulting

The following map and chart shows the top ten countries by predicted value of trade in 2014 for this sector. The bubble map illustrates the differences in value and where geographic clusters are located

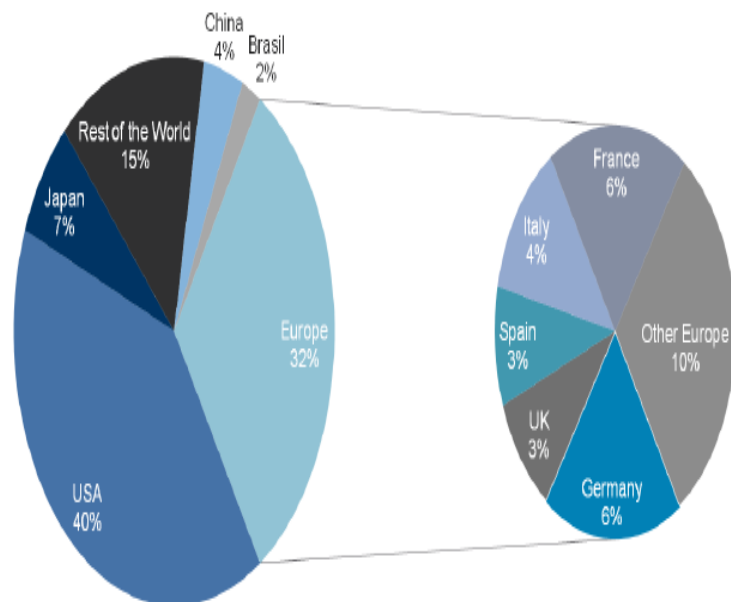
Pharma and Healthcare – Top ten countries by trade value



“The USA is sector leader in Life Science in almost all the constituent sectors and subsectors.” UKTI life science Global Potential

Global Healthcare Expenditure

The total global healthcare expenditure counts for 5.7 trillion US\$ in 2009*.



*Source: World Bank, EDMA, Espicom and Eucomed calculations, 2009
Europe refers to EU - 27 plus Norway and Switzerland

-
- 10,000 Life science companies
- £100bn spend on Medical Devices
- 45% of Global MedTech value
- 34% (\$34bn) MedTech imported
- There appears to be an assumption that the US market will contract due to tight budget constraints and less growth opportunity.
- *This ignores:*
- Huge opportunities to address paradigm shifts healthcare provision eg. E health, Assistive Tech
- Embedded corporate HQ's and R&D in USA
- The dominant global size of the US market with 32 million new patients covered by 2014.
- **Note.** *USA exhibitions tend to be the major sector event attracting global KOL's*

-
-
-

[Bio USA 2013 Chicago www.bio.org](http://www.bio.org)

2012 Boston 16, 505 delegates from 65 countries

25,000 plus meetings

1800 companies exhibiting

19 UK companies (including 5 Welsh companies)

14 Companies from Northern Ireland

20 from Scotland

David Willets, Minister of State for Universities and Science led UK Mission

Advamed Boston Oct 1-3 2012

www.advamed.org

2011. 1900 attendees

22 countries

19 UK companies

82 Exhibitors

Advamed DX (Diagnostics)

CEO's, Business Development,

Investor (especially Corporate

investment arms)



UK @ AdvaMed 2012:
The MedTech Conference
1-3 October 2012 | Boston, MA, USA

AdvaMed 2012: The MedTech Conference, the premier medical device and diagnostics industry event, is an annual international conference hosted by the Advanced Medical Technology Association (AdvaMed). For the first time ever it will be held in Boston, one of the largest and most vibrant medtech clusters in the world. The conference attracts more than 1,900 executives from many of the world's largest and best known medical device and diagnostic companies.

For the past five years, UK Trade & Investment (UKTI) has played a key role assisting British medtech companies achieve results at the AdvaMed Conference. UKTI will once again be supporting the UK mission to showcase UK excellence in medical technology and elevate the visibility of British companies in the US market. Companies attending the mission will be able to access key contacts in the US, and inform them of the world-class R&D and innovation coming out of the UK.

This year includes an expanded diagnostic track, AdvaMedDx, which will provide insights into the policy and business environment facing the rapidly evolving and growing diagnostics industry.

Companies with world-class medical and diagnostic technologies looking to expand their activities globally are encouraged to join the UK Mission to AdvaMed 2012.

The UK @ AdvaMed 2012 delegation is part of the UKTI HealthTech Mission to Boston this fall. For more information on the HealthTech Mission components and to apply to join visit the UK@AdvaMed [website](#).

Applications are due by 1st August.

UK Health Technology SMEs compete for place on US trade mission

A competition to find and support the UK's highest growth potential early stage health technology businesses opens today - with the top 20 winning entrants travelling to Boston, Massachusetts to take part in the Future Health Mission 2012 at the end of September.

The successful companies will benefit from a packed agenda of investor, supply chain partner and customer meetings and networking opportunities.

The online application process and more information about the Future Health Mission 2012 can be found at www.futurehealthmission.com.

Other USA healthcare opportunities

- **AACC American Association for Clinical Chemistry** July 15-19 Los Angeles
- www.aacc.org Clinical chemistry, lab science, lab medicines Contact BIVDA
- **FIME** August 8-10 Miami Beach Convention Centre
- www.fimeshow.com Medical technologies aimed at central and Latin America
- Contact Medilink Yorkshire and Humberside.
- **HIDA Health Industries Distributor Association** Oct 10-12 Chicago
- www.hidamedsurg.org The event to meet USA distributors
- **RSNA Radiological Society for North America** Nov 25-30 Chicago
- www.rsna.org The global show for Radiological /imaging companies
- Contact UKTI Chicago Nadeem Ali-Khan.
- **PITTCON** March 17-23 Pennsylvania Convention Centre
- www.pittcon.org For lab scientist, testing chemical / biologics
- Contact GAMBICA

China Integrated Healthcare Delivery

China is investing in creating a new integrated healthcare system through radical approach to delivering healthcare reform

- Research and Development in Universities and Science Parks
- Building new hospitals and primary care centres
- Educating and training healthcare professionals

UK key Innovations in healthcare which can become integral parts of a holistic healthcare solution

- Drug discovery and development (translational medicine)
- Health Informatics and e-health
- Modernising TCM

Assessment of market

Healthcare provision in the PRC is in a state of change as it extends geographically to reach 90 % of the population and is being reformed in terms of structure, payment (insurance) and public (and foreign) participation. Commercial opportunities for the UK will accrue from the resulting investment in infrastructure equipment and associated services .

Description of opportunity

- Planning/enabling
- Implement
- Equipment
- Operation
- Supply

Objectives

- National & Regional MOUs creating a political umbrella for UK companies operating in the healthcare infrastructure and services sector
- Identify and focus on receptive PRC regions and interlocutors (inception to operation and services to goods)
- Identify potential opportunities and engage UK capability

Activity to date

- VC seminar identifying opportunities in the Beijing area
- Assisted early lifecycle companies (UK) with market entry and partnering
- Mapped UK capability and provided nascent marketing collateral

Planned activity

- Sign MOU with NDRC – focus on cooperation on the ageing population, primary care, and pharmaceutical regulation
- Agree/target Provinces/Municipalities/Cities of Focus
- Local MOUs (NDRC/MOH et al) in targeted areas; Identify local infrastructure opportunities (Public and Private)
- Focused engagement with UK Companies active/invested in PRC and local investors
- A centralist political system requires a cascading multilevel engagement/approach
- Early adopting provinces and regions/provinces with pioneer status offer rewards (an associated risks) to early entrants
- China is not an “L” plate market. Focus on savvy UK Companies with a USP.

China – Biopharmaceuticals and Medical Technology

Key Partnerships

- Renewal of MOU with CCCMHPIE (JETC HCWG)
- New MOU with NDRC
- New joint bio-discovery zones co-organised with China State Institute of Pharmaceutical Industries (CSIPI)
- Promotion of collaboration opportunities with trade associations and stakeholders e.g. ABHI and CAMDI

Next steps

Trade missions and “Open Innovation” Events:

- 6th Annual Meeting of JETC HWG: August 2012 with CCCMHPIE (Olympics, London)
- 1st UK-China Partners for Growth in Medical technologies Mission: April 2012 (Assisted Living Forum) at CMEF with ABHI, CBBC and CAMDI (Shenzhen)
- 5th International Wound Dressings Conference: Sep 2012 with Medilink and CCCMHPIE (Beijing)
- Analytica China: Oct 2012 with GAMBICA (Shanghai).
- 2nd UK-China Partners for Growth in Biopharmaceuticals Mission: Oct 2012 (Managing Change through Partnering in Drug Discovery and Development) with CSIPI, CCCMHPIE, Shanghai Science and Technology Commission and CBBC.

China Missions

- ***China Wound Dressing Conference***
Beijing 09-14th September
- Contact Emma Martin Medilink Y&H
- E.martin@medilink.co.uk
- ***Bio-pharma Conference***
- Shanghai Oct 22-26th
- CBBC Contact
- jing.li@fco.gov.uk

Assessment of market

The Saudi Ministry of Health is investing heavily in its healthcare system, of total value £10bn (7bn just for 40,000 additional hospital beds by 2015). This includes the expansion primary care to serve the Saudi population, the creation of 5 medical cities to provide specialist tertiary care and a general hospital building programme with 138 hospitals planned in the next 4 years.

The annual healthcare market is forecast at £18bn by 2015.

Description of opportunity

- Primary care
- Training and education
- Medical devices and E-health
- Home Care
- Hospital Design and Construction
- Commissioning – Medical Cities

Objectives

- Make the UK the partner of first choice for Saudi health companies
- Proactively support UK companies and institutions in the Saudi health market
- Use the MoU to develop strong contacts in the public health system

Activity to date

- Duke of York meeting March 2011
- Supported MoU April 2011
- Clinical mission to Saudi October 2011
- E-Health scoping mission January 2012
- Inward visit from the North and South medical city CEOs March 2012
- Design and construction mission March 2012
- Lord Darzi's visit April 2012

Planned activity

- AHP seminar May 2012
- Simon Burns – first meeting of the Committee June
- Facilities Management Mission Sept/Oct 2012
- Med Tech mission Sept 2012
- Primary care and home care workshop in market
- Support implementation of MoU
- Continue to follow up clinical mission and visa issues
- Develop key strategic contacts in markets

Assessment of market

The Libyan health system is fragmented and dysfunctional, a mix of public and private provision. NTC have made reform and development a major priority, and have allocated the MoH a £3bn budget to begin the process. The MoH are keen to learn from international experience and have stated that the UK are their preferred partners. However, a lack of institutional capacity is hindering progress, and major development programmes will not be implemented until after elections in mid-2012.

Description of opportunity

- Facilities and infrastructure
- Institutional capacity building
- Policy and administration
- Training and education
- Public health programmes
- Primary care

Objectives

- Establish UK as country of first choice for Libyan Ministry of Health in longer term development of health system
- Help secure contracts for UK companies in meeting Libya's short term needs
- Use the MoU to develop strong contacts in the public health system and to underpin commercial work by UK organisations
- Demonstrate UK political commitment to regeneration of Libya

Activity to date

- Rebuilding Libya conference, September 2011
- Commercial proposals (rehabilitation hospital) October 2011
- Commercial proposals (infra. and hospital mgt) November 2011)
- 1st Mission – fact finding and relationship building
- Report and commercial proposals based on mission findings
- 2nd Mission 25 – 29 March identifying opportunities
- Action plan in development with input from DH, NHS, private sector and universities.
- MoU signed May 21st by Andrew Lansley and Dr Fatima Hamroush

Planned activity

- Recommendations/ action plan to be completed proposals from NHS, private and university sectors.
- Establishment of themed working groups on both Libyan and UK side – policy, training, facilities
- Support for UK companies already in advanced negotiations
- Major contracts to follow Libya elections in June 2012.

Assessment of market

The Health Authority of Abu Dhabi (HAAD) are planning to develop primary care provision in 8 underserved districts in the Emirate and have a long term plan to expand capacity in line with population growth. HAAD have provided UKTI with detailed information on the model they wish to implement and we are supporting UK companies in developing comprehensive propositions. In addition, there is scope for research and training partnerships in health data and IT, building on existing collaborations.

Description of opportunity

- design, build, and management of facilities
- data and communications architecture
- staff training and performance management
- design of care pathways
- accreditation of clinical standards.
- Research and data partnerships

Objectives

- Secure contract for development of 8 primary care centres in Abu Dhabi as a scaleable solution
- Establish UK healthcare as a brand of excellence in UAE
- Support partnerships with UK clinical, training and academic organisations.
- Encourage collaborations in health policy, IT and informatics between HAAD and UK

Activity to date

- Incoming visit from HAAD in January 2012
- Collaborations with BT, Imperial, UHB, Kings, and AstraZeneca
- Follow up meetings with HAAD Director of Policy to identify further opportunities

- Briefed UK companies on primary care opportunity
- Consulted HAAD on draft specification for primary care consortium
- Submitted expressions of interest from UK companies, to HAAD

Planned activity

- HAAD to sift expressions of interest and appoint consortium leader
- UKTI and NHS Global to support development of proposal for HAAD by June 2012

Assessment of market

India has one of the fastest growing health markets in the world, expected to rise to \$150bn by 2015. Growth is fuelled by a rapidly increasing middle class, higher levels of disposable income, a rapidly expanding private insurance market and an exponential increase in lifestyle diseases such as CVD and diabetes

Description of opportunity

- Medical education and training
- Universal care provision
- E-health
- Low cost medical devices
- Primary care, linked to Wellcome Trust

Objectives

- Capitalise on the strong links between Indian and British doctors
- Support development of the Wellcome Trust proposition on primary care
- Targeted medical education and health care technology missions
- Pro-active support of IBHI

Activity to date

- Background opportunities report
- House of Lords seminar
- Supported development of primary care proposition
- Successful outward medical education mission
- Working with DfID to identify 'commercial' aid oppts.
- Web conference highlighting opportunities in India
- Seminar for Medilinks
- Seminar for universities x 2

Next steps

- Plan for an outward mission to India in the last quarter of 2012
- Working with Wellcome Trust to support delivery of their review
- Developing the UK's health education proposition with the potential for a mission in early 2013

Brazil

Assessment of market

The Brazilian health market is forecast to grow to \$120bn by 2017 with growth fuelled by growth in both the public and private sector.

Notwithstanding the challenging regulatory regimes, there remain significant opportunities for British companies in the Brazilian health sector.

Description of opportunity

- Medical devices
- Public sector healthcare delivery
- Medical education
- E-health
- Sports & rehabilitative medicine
- Dental

Objectives

- Make the UK the country of first choice for Brazilian health companies
- Proactively support UK companies in the Brazilian health market
- UK seminars to promote opportunities in the Brazilian health sector
- Use the MoU to develop strong contacts in the public health system

Activity to date

- Background opportunities report
- House of Commons seminar
 - Supported MoU process
 - Inward ANVISA visit
- Brazilian parliamentary delegation support
- Inward sustainable hospital delegation
- BNDES support for healthcare proposition
- Joint Brazilian Chamber of Commerce event
- Medical education seminar in London in April 2012

Planned activity

- Medical education mission to Brazil
- Support to VVIP visit to Brazil
- Follow up with Brazilian delegation
- Scoping project for public sector involvement
- Identify 1 state for pathfinder public health project
- Support implementation of MoU
- Develop key strategic contacts in market

Brasil Next steps

- Hospitalar May 2012 - 18 British companies attended
- MOU between ABIMO and MedilinkUK strengthens
- Plan for an outward mission to Brazil in early autumn
- Supporting DH in delivering inter-governmental MoU
- Built strong contacts within the private and public sector which companies can now capitalise on
- New opportunities being identified in Recife and Belo Horizonte

Brasil Mission

BRAZIL TRADE MISSION

MEDILINKUK

FORM NEW PARTNERSHIPS IN BRAZIL

15 - 19 OCTOBER 2012
SAO PAULO, BRAZIL

UK healthcare companies can overcome many of the traditional barriers to entry in Brazil (regulation, excessive bureaucracy, import tariffs) by forming collaborative partnerships with Brazilian manufacturers.

With this in mind, UK Trade & Investment (UKTI) is partnering with Medilink UK to run a unique healthcare mission to Brazil in October 2012.

Medilink UK will be utilising its' relationship with ABIMO - the largest Brazilian medical device trade association - to match-make participants with Brazilian manufacturers with a view to creating collaborative partnerships. These partnerships could include:

- Joint ventures
- Contract manufacturing
- Technology licensing
- Contract / collaborative R&D
- Reciprocal distribution

Costs for the mission are still being finalised, however as places will be extremely limited companies are asked to complete the attached Expression of Interest form as soon as possible.

MISSION PACKAGE:



- Individual meeting programme with potential partners
- Match-making with ABIMO members who fit your criteria
- Participation in group meeting programme including briefing session, hospital visits and manufacturing site visit
- Networking event with ABIMO members
- Hotel room for duration of mission in Avendha Paulista (central business district) region - ideal for meetings
- Full support from Medilink & UKTI before, during and after the mission

MEDILINKUK
TRANSFORMING HEALTHCARE

supported by **UK TRADE & INVESTMENT**

Hit the world running UK

For further information, please contact:

Kevin.Wilson@uktispecialist.com