

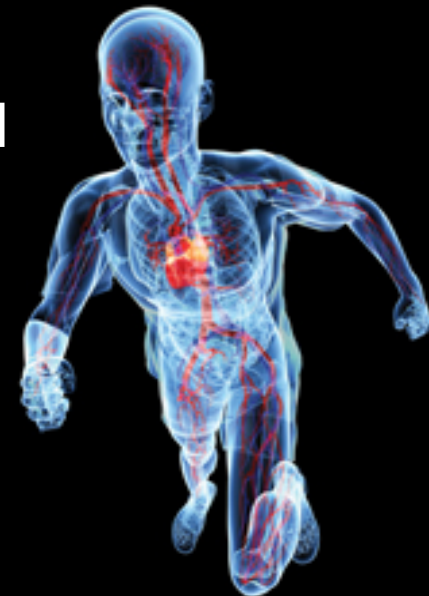


Unlock Your Global Business Potential:
The UK Life Science Offer

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The UK Life Science Offer

What the Department for
International Trade can do for you
and priorities for the next five
years

**INNOVATION
IS
GREAT**
BRITAIN





Government's Commitment to the Life Science Sector

•“In December 2011 I made a firm commitment to re-establish the UK's global leadership in the life science sector, announcing the Government's ten-year Strategy for UK Life Sciences.”

•“By more closely integrating the UK's unique strengths, I believe that we can improve healthcare for patients, attract new investment to the UK, and create new jobs and business opportunities in an increasingly competitive and international industry.”

The Strategy makes the most of the UK's core strengths:

- Basic science in universities
- Translational and clinical research
- Industry
- The National Health Service (NHS)



David Cameron
Prime Minister
2010-2016





Department for International Trade

- Department for International Trade created in July.
- Creation emphasises importance of trade and inward investment to government.
- Department tasked with establishing new relationships with countries throughout the world.
- International Trade and Investment forms part of new Department.



***Dr Liam Fox MP
Secretary of State***





International Trade & Investment

International Trade and Investment is the part of DIT that helps UK-based companies succeed in the global economy and assists overseas companies to bring their high-quality investment to the UK.



Greg Hands MP
Minister of State for Trade and Investment



Dr Catherine Raines FRSA MoID
Director General of International Trade and Investment





Department of International Trade Life Sciences Organisation

The Life Sciences Organisation (LSO) is a dedicated life sciences department within ITI that;

- offers UK life sciences companies support and advice to trade in international markets;
- assists overseas life sciences companies to bring their high-quality investment to the UK;
- provides advice to overseas companies on how to sell to the NHS and the private sector.



Matthew Speers
CEO DIT LSO





What DIT LSO can do for you

- Impartial and tailored advice from exporting experts and analysis on political, economic and security issues in overseas markets
- Market research support to improve the effectiveness of your export initiatives
- First-class advice on language and cultural issues to improve your business communications in international markets
- Introductions to trade associations, government officials and potential overseas buyers and to the international procurement processes for large-scale commercial projects
- Connection with DIT staff in British Embassies, Consulates and High Commissions





What DIT LSO can do for you

- International visits and attendance at UK and overseas events and exhibitions
 - with support for you to gain the knowledge, networks and customers to expand your business





What DIT LSO can do for you

- Problem solving with legal or regulatory issues and advice on intellectual property and how to protect it
- A free, tailored service providing you with new international business sales leads
- Expert online information and presentations delivered by industry experts from across the globe
- Route to market – how to effectively sell and plan your product or service sales.





DIT Services

- UKTI International Trade Advisers
- Overseas Market Introduction Service (OMIS)
- Overseas Business Risk Service





UK Export Finance (UKEF)

- UK's export credit agency which provides trade finance and insurance to support exports through;
 - risk protection to exporters
 - facilitating finance for exporters
 - supporting and providing loans to overseas buyers
- Contact at [gov.uk/uk-export-finance](https://www.gov.uk/uk-export-finance)





Life Sciences Organisation – Inward Investment

LSO is tasked each year with delivering on key investment projects and targets and focuses on bringing value adding investment to the UK.

There has been a consistent increase in inward investment over the past three years.

This year, LSO will continue to focus on value-adding inward investment, attracting investment in priority subsectors and project themes, and enhancing our emphasis on Export Oriented FDI.





www.lifesciences.ukti.gov.uk/

- **Platform to allow UK and international companies, academia and R&D organisations to connect:**
- **Mapping Tool** – Search for UK companies - profiling over 4,500 UK life science companies – data compiled as part of the Strength & Opportunity report.
- **Access to Funding** – A search for UK funding opportunities under specific categories of government funding support.
- **Trade Campaigns** – presenting global and market opportunities in a co-ordinated programme of activity for UK companies in the specific campaign areas of Digital Health, Experimental Medicine & Clinical Trials, In Vitro Diagnostics and Making Tomorrow's Medicines.
- **Exporting to the US** - a toolkit to provide UK companies with the guidance and advice they need to make them 'Market Ready' for the US market.
- **Latest News** – profiling the latest news for UK life sciences with links to social media platforms.
- **Access Route Map** – an interactive infographic to facilitate online navigation of the UK Life Sciences ecosystem in the specific areas of - Digital Health & Care, Experimental Medicine & Clinical Trials, Medical Technology, Medicines Manufacturing, Regenerative Medicine, and Precision Medicine & Genomics.



Additional Features of the Web Portal

•Registration

- Registration is required to allow more than one company search
- Registration only takes 2 minutes to complete
- Registration provides you with your own log-in details to allow searches to be saved and accessed by you at any time

•Latest News

- Keeping you up-to-date with the latest news for UK life sciences
- **This promotional platform is available for you to share your latest news with us and we will promote to our UK and international network**

•Contact Us

- Facility to request more information on investing in the UK, or exporting from the UK
- To update your company profile or to request your company details to be added
- To register your interest in being part of the trade campaign community





Exporting is GREAT - <https://www.exportingisgreat.gov.uk/>

Support to help businesses start to export

- 1648 export opportunities online to view – posted by overseas network

The website demonstrates the following three steps to becoming an exporter:

1 Download the export guide for the following information:

- Finding the right market
- Getting ready to export
- People to speak to
- First steps checklist

2 Find events

- Event listings and detail on where the Export Hub will appear at a number of large-scale events over the next 12 months including exhibitions and conferences.

3 Get export support

- Information on getting started
- Selling online
- Contact your local export network





Export data for Pharma and Medtech (2015)

Highlights

- **34 markets recorded £100m pa** or more in annual sector exports, top 20 listed at right
- Lead export markets for **Pharma**: US, Germany, Netherlands, France, Spain, Italy, China, Rep of Ireland, Belgium, Japan
- Lead export markets for **Medtech**: US, Germany, Belgium, Netherlands, France, Rep of Ireland, Italy, China, Spain, Japan
- **By Region** (£100M markets):
 - **Europe**: EU £12.6b (Austria, Czech Republic, Denmark, Finland, Greece, Hungary, Portugal); non-EU £776m (Norway)
 - **North America**: **£9.3b** (Mexico)
 - **Asia & Oceania**: **£3.1b** (Singapore, South Korea, Taiwan, India)
 - **Middle East & North Africa**: **£1.1b** (Israel)
 - **Latam & Caribbean**: **£718m**
 - **Sub-Saharan Africa**: **£342m** (South Africa)

Rank	Market	Pharma	Medtech	Total
1	United States	£ 8,061,800,578	£ 797,343,703	£ 8,859,144,281
2	Germany	£ 2,804,997,737	£ 530,404,456	£ 3,335,402,193
3	Netherlands	£ 1,832,426,425	£ 273,265,200	£ 2,105,691,625
4	France	£ 1,066,784,162	£ 257,412,314	£ 1,324,196,476
5	Spain	£ 957,264,616	£ 120,110,240	£ 1,077,374,856
6	Italy	£ 906,754,736	£ 168,436,406	£ 1,075,191,142
7	China	£ 850,963,519	£ 155,823,164	£ 1,006,786,683
8	Belgium	£ 592,509,956	£ 316,443,751	£ 908,953,707
9	Irish Republic	£ 661,545,650	£ 184,792,192	£ 846,337,842
10	Japan	£ 545,739,326	£ 126,920,655	£ 672,659,981
11	Switzerland	£ 341,185,971	£ 94,217,500	£ 435,403,471
12	Australia	£ 348,445,088	£ 66,378,721	£ 414,823,809
13	Russia	£ 319,980,938	£ 24,634,834	£ 344,615,772
14	Brazil	£ 293,096,623	£ 25,129,168	£ 318,225,791
15	Canada	£ 286,960,034	£ 26,610,173	£ 313,570,207
16	Sweden	£ 233,410,062	£ 80,154,110	£ 313,564,172
17	Saudi Arabia	£ 238,626,398	£ 35,482,835	£ 274,109,233
18	Poland	£ 204,407,574	£ 39,481,392	£ 243,888,966
19	UAE	£ 202,881,360	£ 36,532,347	£ 239,413,707
20	Turkey	£ 164,591,147	£ 49,725,839	£ 214,316,986



United States

- Largest market for UK life sciences products and services
- \$3 trillion spend on healthcare in 2015. \$140 billion on medtech, growing at 5% per year
- Forecast UK life sciences exports by 2021 - £9.2 billion
- Texas
 - Hospital expansions – total value over \$5 billion, 10% on life sciences products and services
 - “Spotlight on Texas” with ABHI
- Key events
 - BIO Conference – June 2017
 - JP Morgan Conference – January 2017
 - Health Datapalooza – September 2017
 - Advamed – October 2017





China

- Predicted to become world's largest life sciences market in 2016
- Third largest medical device market in world worth \$27.7 billion in 2014 with annual growth forecast at 10.6%
- Diagnostics market will grow from £9.3 billion in 2014 to £20.1 billion by 2020
- Forecast UK life sciences exports by 2021 - £2 billion
- Increased awareness of UK market presence and innovation and experience
- Hospital build projects presents enormous opportunities for UK companies to enter supply chain
- Key events
 - Medica – November 2016
 - China Medical Equipment Fair – May 2017
 - Shandong Pharmaceutical Mission – May 2017





China International Medical Equipment Fair

- CMEF in Shanghai is the largest medical device fair in China.
- Over 65 conferences and forums
 - 28 countries represented
 - 4000 exhibitors
 - 110 000 visitors







Who should go to CMEF

The fair covers approx 15,000 products

- medical imaging,
- IVD equipment and reagent,
- medical electronics,
- medical optics,
- first aid,
- rehabilitation devices,
- nursing,
- Telemedicine

Visit by UK delegation will also involve meetings with Chinese government agencies and major hospitals





Japan

- Currently the world's second largest pharma and medical devices market - \$32 billion in 2014
- Already strong UK industrial presence
- Forecast UK life sciences exports by 2021 - £1.9 billion
- Major areas of opportunity
 - regenerative medicine
 - precision medicine
 - aging
 - public health policy
- Key events
 - BIO Japan – October 2017
 - Trade missions





Germany

- Number one export destination for UK life sciences sector in Europe
- Considerable indigenous capability, but over \$16 billion of med tech imports in 2014
- Forecast UK life sciences exports by 2021 - £3.04 billion
- Key events
 - Medica – November 2016
 - Pharmaceutical services outward mission



India



- UK exports relatively low at present. \$2.5 billion med tech imports in 2014. UK share 2.4%.
- Particular opportunities in immediate future in new drug development and oncology diagnostics
- Smart cities programme will involve hospitals in each with nursing and medical colleges attached. Keen to involve UK companies in supply chain.
- Forecast UK life sciences exports by 2021 - £295 million
- Key events
 - Technology Summit – November 2016
 - Vibrant Gujarat 2017 – January 2017
 - bespoke missions





Mediterranean

- Regional campaign involving Spain, Italy, Israel, Greece, Cyprus and Portugal
- Particular opportunities
 - Diagnostic equipment, digital health, biotechnology (Italy)
 - Biotechnology, pharmaceuticals, digital health and dental (Spain)
- Forecast UK life sciences exports by 2021
 - Spain £1.4 billion
 - Italy £1.5 billion
 - Israel £160 million
 - Greece £140M
 - Portugal £113M





United Arab Emirates

- One of the fastest growing healthcare markets in world. One of UAE's top three priorities with annual spend \$14 billion in 2014.
- Medical Equipment, Devices and Supplies market \$897M in 2014 with \$782M imported.
- Major hospital build programme and requirement for supply chain.
- Medical tourism hub of Gulf.
- Forecast UK life sciences exports by 2021 - £417M
- Potential regional Gulf campaign
- Key events
 - Arab Health – January 2017
 - Arab/Med Lab – February 2017
 - Regional events (Saudi Health)
 - Ministerial events and missions





South Korea

- Growing life sciences industry and requirements.
- Medical device market £3 billion in 2014 with 65% imported
- UK presence growing and UK quality and technology highly valued
- Forecast UK life sciences exports by 2021 - £450 million
- Key events
 - Regenerative Medicine Mission
 - Medica and Arab Health
- BioKorea
 - Bespoke missions



Any Questions?

Thank you!

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