

# Medical Devices Industry Research

Fitch Solutions Medical Devices Industry Research service provides in-depth, market-level and thematic analysis. Specialising in emerging and frontier markets where high quality data and information is hard to find and interpret, we produce quarterly industry reports, high frequency daily analysis and 10-year historic and 5- and 10-year forecast data series for the medical devices sector.

The Medical Devices service provides key insights across the global market for medical devices, with a special focus on country-level markets, companies and their products, industry regulations, and key sub-sectors such as diagnostic imaging and artificial intelligence. By combining economic, political and regulatory analysis with the latest industry trends and developments, we deliver an integrated and forward-looking view of the industry to multinational and national healthcare companies, technology providers, R&D firms, suppliers, government departments and financial institutions.



## Daily Analysis

Explaining the implications of developments and their impact on our forecasts, as well as highlighting industry trends.



## Data and Forecasts

Comparable and exportable database containing over 3 million data points, with 5- and 10-year medical devices forecasts for developed, emerging and frontier markets.



## Competitor Intelligence

View company profiles, strategies and financials for key players in each sector.



## Quarterly Strategic Content

Systematically updated forecasts, key industry trends, business environment and company strategy analysis for 75 markets globally.



## Proprietary Indices and Special Reports

Quantify and compare market opportunities and risks using the Medical Devices Risk/Reward Indices. Explore trends and growth areas with thematic special reports covering Digital Transformation, Wound Care and Molecular Imaging, as well as regular reports for key industry sub-sectors.



## Analyst Interaction

Speak directly with our sector specialists behind the research for insights and advice.

## Industry Trend Analysis

- Proprietary views that highlight industry opportunities and risks, with regards to a specific market or at a regional or global level.
- Data analysis including market forecasts, and how changing market conditions could and are impacting our segment and country outlooks.
- Independent analysis taking into account the impact of the business environment (industry and market specific), politics and economics.
- Company analysis including financial performance, company strategy, mergers and acquisitions, restructuring activities and investments.
- Proprietary Medical Devices Risk/Reward Indices allow Fitch Solutions to quantify and compare the investment attractiveness of individual markets and provide unique analysis of investment opportunities and risks.

## Country Markets

Every country is covered with regards to data and analysis – however, greater emphasis is placed on larger and more dynamic markets. All commercially significant developed, emerging and frontier markets are covered in the quarterly country reports.

Sections of the quarterly reports include: country specific industry SWOT, data and analysis of top-line medical devices spending and sub-sector spending (Consumables, Diagnostic

Imaging, Dental Products, Orthopaedics & Prosthetics, Patient Aids, Other Medical Devices), data and analysis of top-line and public and private healthcare spending and analysis on healthcare insurance, infrastructure and personnel, industry regulations (cybersecurity concerns, intellectual property, market access and pricing and reimbursement), medical devices trade balance and imports/exports, government policy, R&D pipeline, approvals and product launches, industry developments, competitive landscape and company profiles.

## Data and Forecasts

Comparable indicators for the medical devices sector in each country market and across six dedicated product segments, with annual and monthly trade balance, import and export trade data and sales and forecasts for:

- **Consumables** – including dressings, suturing materials, syringes, needles, catheters, blood-grouping reagents, first-aid boxes and kits, ostomy products and surgical gloves.
- **Diagnostic Imaging** – including electrodiagnostic apparatus (electrocardiographs, ultrasound, MRI, scintigraphic), radiation apparatus (CT scanners, X-ray, A, B, C ray), and imaging parts and accessories (contrast media, medical x-ray film, x-ray tubes).
- **Dental Products** – including capital equipment (drills, chairs, x-ray) and instruments and supplies (cements, instruments, teeth and other fittings).
- **Orthopaedics & Prosthetics** – including fixation devices, artificial joints and other artificial body parts.
- **Patient Aids** – including portable aids (hearing aids, pacemakers and other) and therapeutic appliances (mechano-therapy apparatus, therapeutic respiration apparatus).
- **Other Medical Devices** – including wheelchairs, ophthalmic instruments, hospital furniture, medical and surgical sterilisers, ultra-violet or infra-red ray apparatus and other instruments and appliances.

All data can be downloaded to Excel or visualized using the Interactive Charts functionality in Fitch Connect.

## Sources of Information

- Global and market specific industry associations
- Local and multinational company websites for press releases, presentations, annual reports, transcripts and data
- Local and global news sources
- Relevant government departments and multilateral organisations

Our 'Connected Thinking' approach to forecasting and analysis integrates macroeconomic variables and political risk views from our Country Risk service into our industry research. This provides our clients with unique and valuable insight into the external macroeconomic and political forces that will impact their operations and revenue generating potential.

# Quarterly Country Report Coverage

## Africa

- Egypt
- Ghana
- Kenya
- Morocco
- Nigeria
- South Africa

## Americas

- Argentina
- Brazil
- Canada
- Chile
- Colombia
- Cuba
- Mexico
- Peru
- United States
- Venezuela

## Asia

- Australia
- Bangladesh
- China
- Hong Kong, China
- India
- Indonesia
- Japan
- Malaysia
- New Zealand
- Pakistan
- Philippines
- Singapore
- South Korea
- Taiwan, China
- Thailand
- Vietnam

## Europe

- Austria
- Belarus
- Belgium
- Bulgaria
- Croatia
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Netherlands
- Norway
- Poland
- Portugal
- Romania
- Russia
- Serbia
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- Ukraine
- United Kingdom

## Middle East

- Bahrain
- Iran
- Iraq
- Israel
- Jordan
- Kuwait
- Lebanon
- Oman
- Qatar
- Saudi Arabia
- United Arab Emirates





## Jamie Davies

### Head of Pharmaceuticals, Healthcare & Medical Devices

Jamie leads a team of UK, Singapore and South Africa-based analysts responsible for identifying market entry and expansion opportunities, assessing operational risks and analysing corporate growth strategies across global pharmaceutical and healthcare markets. Besides producing market analysis for Fitch Solutions' client base, Jamie regularly speaks at industry conferences and at corporate investor days. Based in London, Jamie joined Fitch Solutions in 2006. Prior to joining the company, Jamie wrote for Thomson Scientific's Current Drugs, an industry journal, where he reported on pipeline advances. Prior to that, he worked at PJB Publications' PharmaProjects, where he tracked investigational drugs through clinical trials. Jamie graduated from King's College, London with a degree in Pharmacology with Management and received an MBA from the Open University in 2019.

Our analysts will always be on hand to explain growth forecasts, present a regional outlook, or help our clients understand the implications of different industry risk scenarios. We call this 'Analyst Added Value'.

## Learn More

Fitch Solutions fuels better informed credit risk and strategy decisions with reliable data, insightful research and powerful analytics. Get the crucial intelligence and fresh perspectives you need, especially in markets where information is hard to find and difficult to interpret. Our data and research are produced with accuracy, granularity and depth. Leverage workflow efficiencies, transparent methodologies, and accessible experts who add extra value to our products.



## For any queries, Contact:



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