



**ALVIMEDICA**  
MEDICAL TECHNOLOGIES

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Ankara, 2011



# Medical Device Market in Turkey

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**Ankara, 2011**

# Summary of the Turkish Medical Device Market, 2009

	2009
Market size(US\$ millions)	1,062
as % of total health expenditure	2.2
as % of GDP	0.2
as % of world market	0.1
Supplied by imports(%)	85.0
Growth rate(%)	6.5
Per capita (US\$)	15

# Turkey Medical Device Market by Category, 2009

	<u>US\$ Millions</u>	<u>As % of Total Market</u>	<u>Per Capita(US\$)</u>
Consumables	154	14.5	2.1
Diagnostic imaging	227	21.4	3.1
Dental products	75	7.1	1.0
Orthopaedic&implantable products	160	15.1	2.2
Others	446	42.0	6.1
<b>Total</b>	<b>1,062</b>	<b>100.0</b>	<b>14.6</b>

# Summary Key Data Projections, 2009-2014

	2009	2010	2011	2012	2013	2014
Medical Device Market(US\$ millions)	1,062	1,113	1,197	1,286	1,388	1,454
Per Capita (US\$)	15	15	16	17	18	19
As % of Health Expenditure	2.2	2.2	2.1	2.1	2.0	2.0
Health Expenditure(US\$ billions)	48.0	51.2	56.8	62.2	67.8	72.7
Per Capita(US\$)	661	698	768	883	899	956
As % of GDP	8.4	8.4	8.4	8.4	8.4	8.4
Private(%)	27.9	27.9	27.9	27.9	27.9	27.9

## Projections Medical Equipment Market, 2009-2014(US\$ Millions)

	<u>Market(local currency)</u>	<u>Market(US\$ millions)</u>	<u>Per Capita(US\$)</u>
2009	1,780	1,062	15
2010	1,880	1,113	15
2011	2,004	1,197	16
2012	2,152	1,286	17
2013	2,322	1,388	18
2014	2,491	1,454	19

## Radar Graph of the Turkish Medical Market, 2009

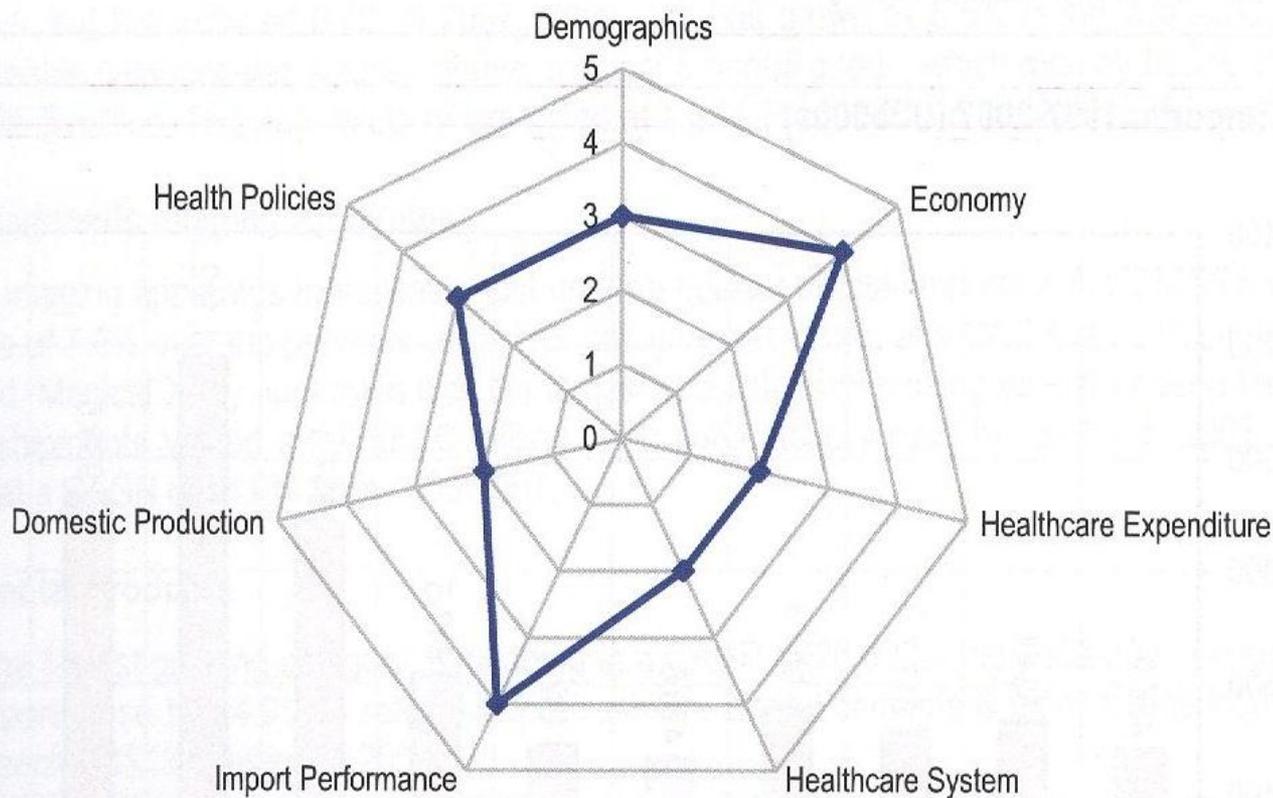


Chart derived from the tables on the previous page. Very strong = 5, Strong = 4, Fair = 3, Below average = 2, Poor = 1.

## SWOT Analysis of the Turkish Medical Device Market, 2009

### Strengths

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- \*Consistent levels of public health expenditure
- \*Falling morbidity&mortality rates and improving demographic indicators
  
- \*Multiple healthcare providers offer choice
- \*Market regulations increasingly in line with the EU; more extensive than elsewhere in Middle East
- \*Higher level of domestic production than elsewhere in Region; exports rising annually

### Opportunities

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- \*Stronger links could be forged with EU, even if accession talks fail; possible privileged partnership
- \*EU accession would open markets and stimulate growth
  
- \*Potential for investment in, and enlargement of, Private sector
- \*Development Plans to speed up health development
- \*Investment in, and expansion of, domestic production
- \*Heavily reliant on imports

### Weaknesses

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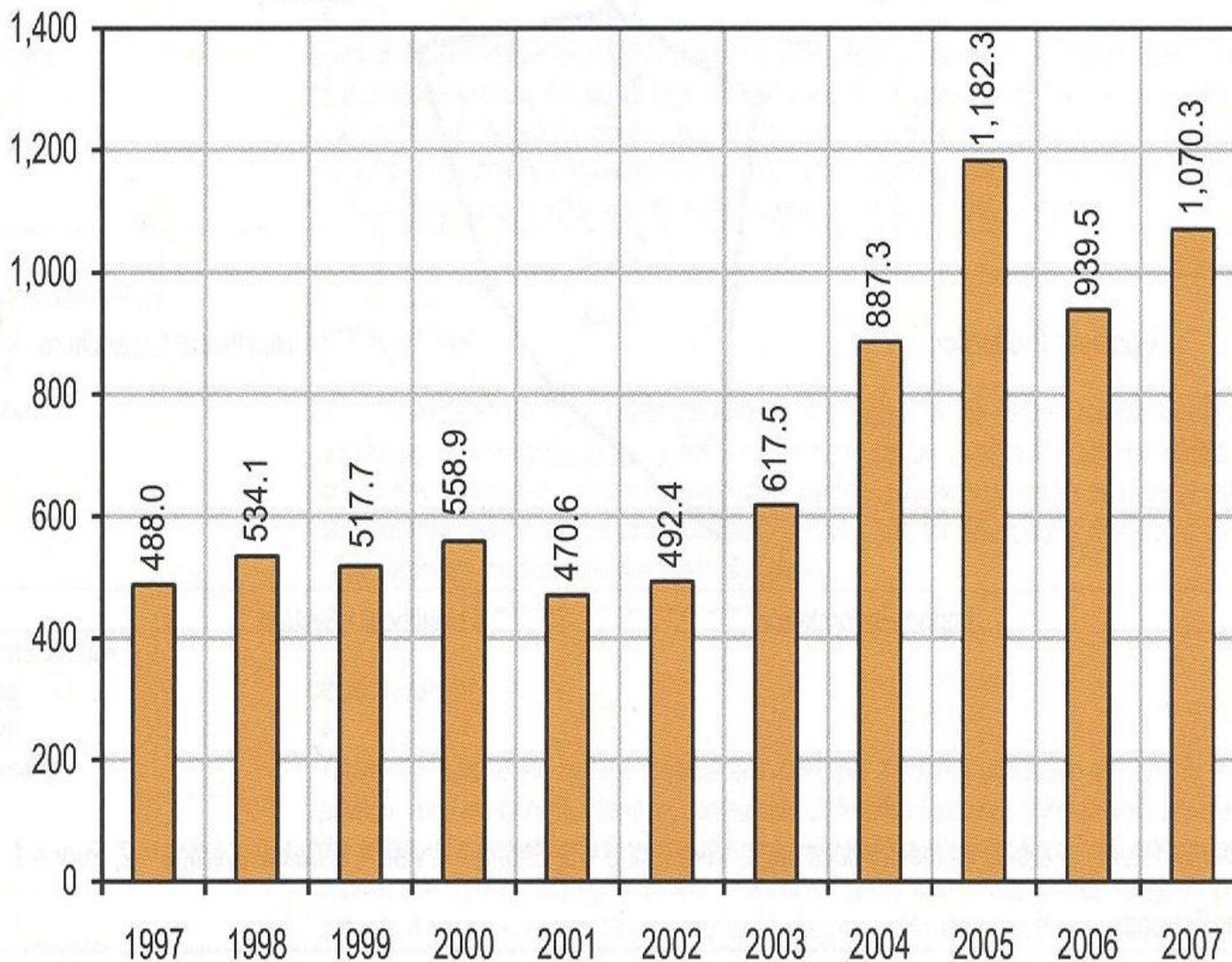
- \*Pace of healthcare development is slow
- \*Unstable political climate, ongoing economic problems, fluctuating exchange rates and bureaucratic regulatory environment
  
- \*Multiple healthcare providers lead to confusion
- \*Unco-ordinated and uneven market growth; lack of private sector expansion

### Threats

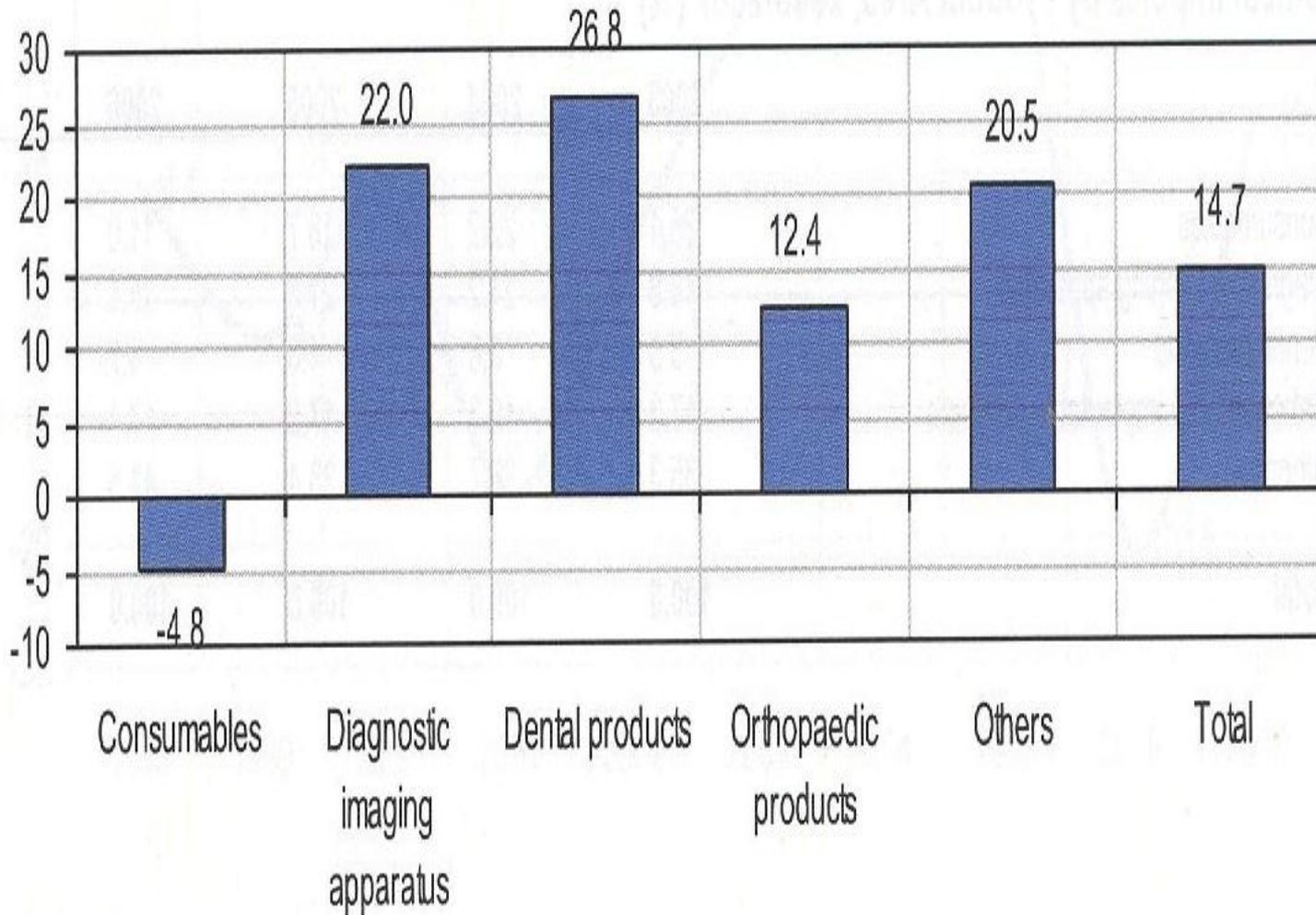
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- \*Risk of isolation if EU membership negotiations fail; possible loss of trade and subsequent contraction of market
- \*Increasing dependence on public sector if there is no significant expansion of private sector

## Medical Imports, 1997-2007 (US\$000s)



## CAGR of Medical Imports by Product Area, 2003-2007 (CAGR %)



## Exports of Medical Equipment & Supplies, 1997-2007 (US\$ Millions)

