Unmet needs in Asia-Pacific (APAC)



~3.7B people

51% of world's population lives in APAC



1.1B people

50+ years of age by 2025



65M babies

born each year (equivalent to UK



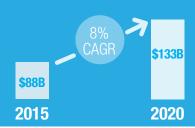
2B people

in consuming class by 2025 (~50% of whole APAC)



for major chronic

APAC med-tech market, \$ billion





Realities facing med-tech industry in APAC

Challenging and underserved market

Frugal spending Average healthcare spend per capita APAC 376

EU

US

9,146

22%

of global med-tech market



of global **GDP**



of global population

VS



80% of emerging APAC population cannot afford med-tech solutions designed for developed markets

Multisegment

markets





VS







Inadequate

infrastructure India will take 85 years to achieve OECD physician density

Intense competition

10+ local Asian companies with med-tech revenues \$1B+

Regulatory complexity and undercapacity China's regulatory

staff workload 20x relative to the US

Opportunities for industry-wide collaboration



Regulatory capacity

Partner with academia to expand pool of regulatory-affairs professionals



Medical education

Use technology to enhance pace and quality of medical education



New delivery paradigms

Accelerate adoption of new healthcare delivery models (eg, home care)

Source: Amit Agarwal, Axel Baur, Shan He, Franck Le Deu, Satsheel Shrotriya, and Florian Then, MedTech in Asia: Committing at scale to raise standards of care for patients, Dec 2015, McKinsey.com