



# Healthcare Industry Research

Fitch Solutions Healthcare Industry Research 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 annual industry reports, high frequency daily analysis and 10-year historic and 5- and 10-year forecast data series for the healthcare sector.

The Healthcare service provides key insights across the global healthcare market, with a special focus on country-level markets, industry regulations, and key sub-sectors such as digital health, health insurance, and government health budgets. 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 pharmaceutical and medical device companies, healthcare providers, private hospital chains, payors, health insurance firms and reimbursement organisations.



## Daily Analysis

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



## Annual Reports

Systematically updated forecasts, key industry trends, operating environment for 108 markets globally.



## Data and Forecasts

Comparable and exportable database containing over 1 million data points and 200+ indicators, with 10-year healthcare forecasts for developed, emerging and frontier markets and up to 25 years of historic data.



## Special Reports

Explore trends and growth areas with thematic special reports, as well as regular reports for key industry sub-sectors.



## Analyst Interaction

Through the Analyst-Added Value (AAV) offering, 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.
- Quantitative and qualitative content in Industry Trend Analysis is forward looking and views-based.
- Leading topics for Industry Trend Analysis include government healthcare budgets, the implications of elections/political events on healthcare and changes to healthcare policy/healthcare reforms.



## 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 country reports.

The country market reports are designed to help understand risks and opportunities in healthcare markets globally. They are used for market sizing for a business case, consultancy project or credit note. The reports assist in defining market structure before market entry. They can facilitate the screening of countries for investment decisions. The country reports can help with assessing the adoption of new health technologies cross-country/globally.

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## Data and Forecasts

Comparable indicators and Key Views for the healthcare sector in each country market and across six dedicated product segments:

- **Health Expenditure** – expenditure forecasts for public and private spending, payor landscape, and government healthcare budget.
- **Healthcare Resources And Activity** – number of hospitals, hospital beds, public versus private sector, physicians, nurses, pharmacists, dentists, private health insurance, and medical tourism.
- **Healthcare Activity** – inpatient admissions, outpatient visits, average length of stay in hospital, and surgical procedures.
- **Disease Burden And Demographics** – disease prevalence, causes of death, outpatient visits and inpatient visits, and population projections (aged >65 years and median age).
- **Key Macroeconomic Indicators** – real GDP growth, nominal GDP per capita, consumer price index, and current account balance.

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

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## 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.



## Country Report Coverage

### Africa

- Algeria
- Angola
- Botswana
- Cameroon
- Cote d'Ivoire
- Ethiopia
- Gabon
- Ghana
- Kenya
- Mauritius
- Morocco
- Mozambique
- Namibia
- Nigeria
- South Africa
- Sudan, South Sudan
- Tanzania
- Tunisia
- Uganda
- Zambia
- Zimbabwe

### Americas

- Argentina
- Brazil
- Canada
- Chile
- Colombia
- Costa Rica
- Cuba
- Ecuador
- El Salvador
- Guatemala
- Honduras
- Mexico
- Nicaragua
- Panama
- Peru
- United States

### Asia

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

### Europe

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

### Middle East

- Bahrain
- Egypt
- 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.

To find out more, please contact your **Account Manager** or a member of our **Client Services Team**.



## Client Services

A dedicated team of Fitch client services professionals based in New York, London, Hong Kong, Singapore and Tokyo provide client support.

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