

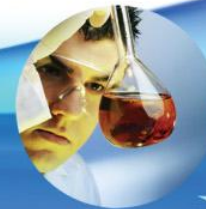
MediWales



Gwyn Tudor

Forum Manager

This document represents the personal opinion of the author



The Life Science Sectors

Medical Technology

Medical Biotechnology

Industrial Biotechnology

R&D led

Long time-to-market requiring significant pre-revenue investment

IP important to protecting this investment

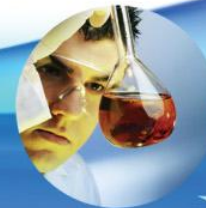
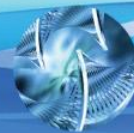
Global markets with large global niches

Highly regulated

Complex high value contracts

Collaboration and close university and clinical links

Pharmaceuticals



UK Markets

Medical Technology

Estimated turnover £13.1bn. 3,034 companies employing over 55,625. Single use technology, in-vitro diagnostics, orthopedic devices and wound care are the four largest segments all with turnovers greater than £1bn. 4% growth in companies in last year.

Medical Biotechnology

Estimated turnover of £5.5bn. 942 companies employing over 36,700 people. 50% use small molecule technology, with the remainder using technologies based on biological material, such as antibodies or proteins.

Industrial Biotechnology

Estimated turnover of £308m. 55 companies employing 1,083 people. Robust estimates of the UK industrial biotechnology market by 2025 range from £4bn to £12bn indicating the potential of this sector.

Pharmaceuticals

Turnover over £16bn in 2007. In 2008, around 45,000 people were employed in 375 companies for which the primary activity is classed as pharmaceutical manufacturing. 27,000 in industry based R&D.



Strength and Opportunity 2010

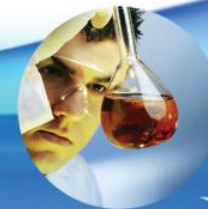
“Collaboration between Government, industry and the national and regional support networks is an important component of the UK’s strength in life sciences. Begun in June 2008, the database of companies active in the Medical Technology, Medical Biotechnology and Industrial Biotechnology sectors across the UK is a key example of this collaborative approach. This initiative has enhanced our understanding of these sectors and forms an important part of the evidence base on which policy development depends.”

David Willetts

HM Government



Annual Update – December 2010





Welsh Life Science

Companies

- 287 Companies (2011)
- 15,000 Employees (2008)
- £1.3Bn Turnover (2008)
- £19% Growth over 3 years (2009)

Manufacturing Strengths

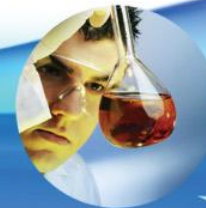
- Wound care
- Aids for the disabled and mobility
- Diagnostics
- Pharma supply chain

Sub sectors (2009)

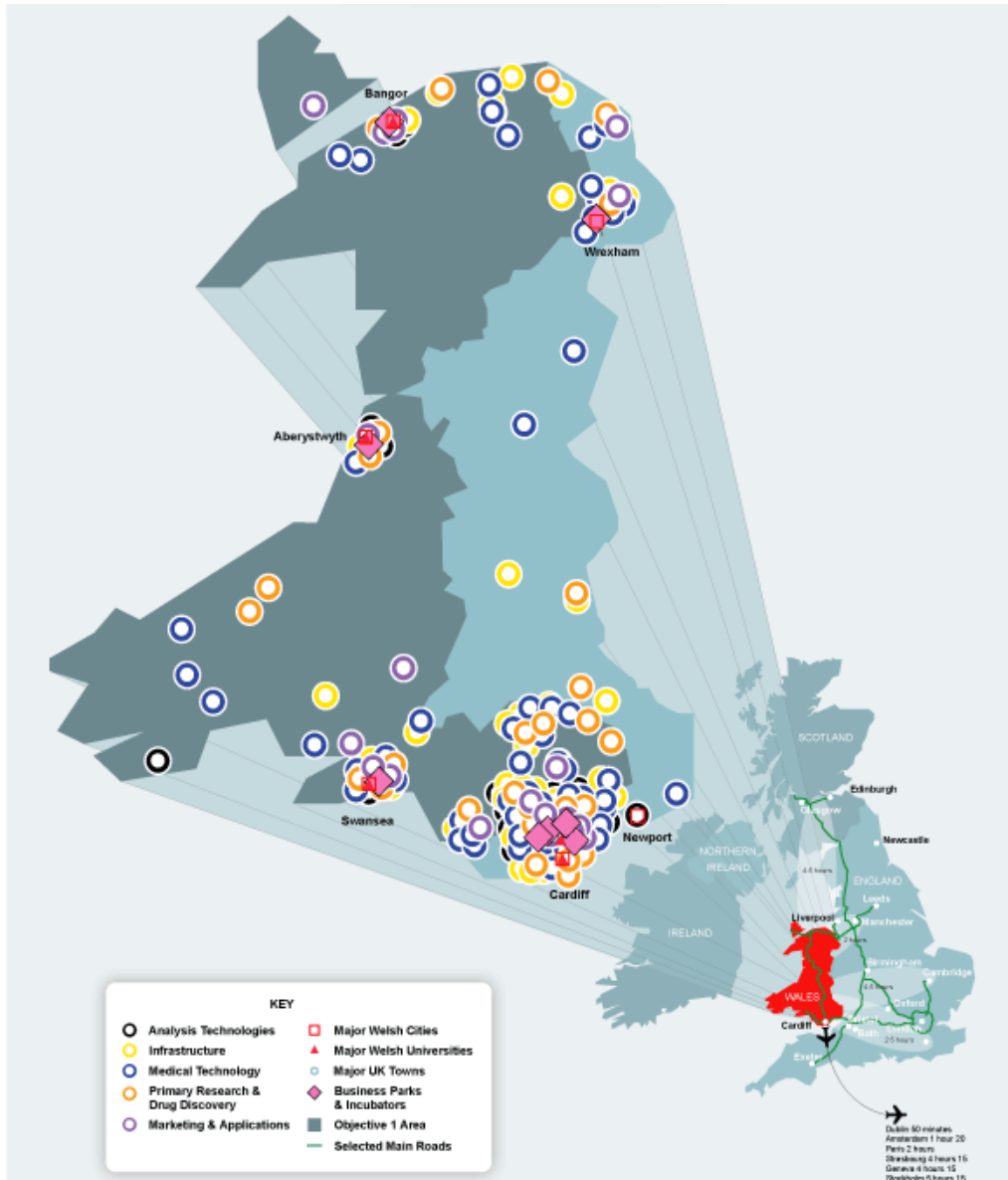
- 173 Medical Technology
- 34 Agri-environmental
- 27 Medical Bio
- 21 Industrial Bio

Academia

- 183 academic (life science) groups each with annual income of over £250k pa

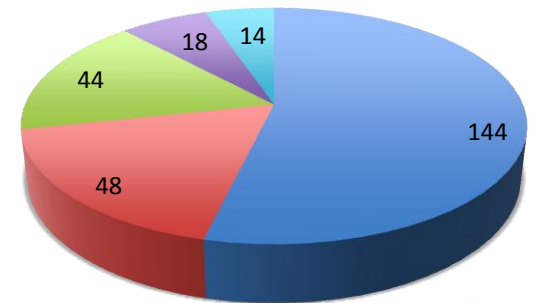


Welsh Life Science

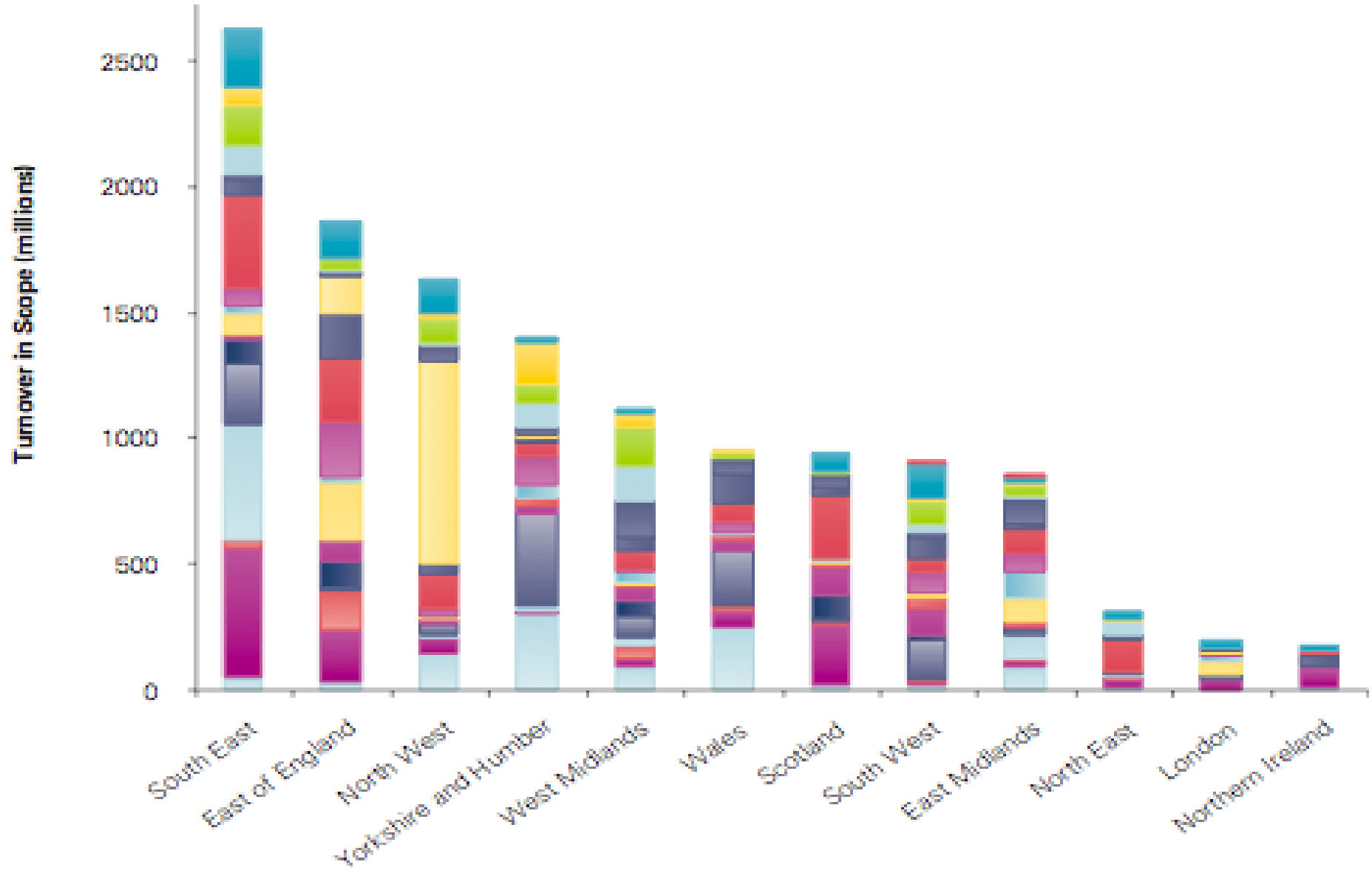


South East	144
North East	48
South West	44
Mid Wales	18
North West	14

(2009 data)



UK Medical Technology Companies



Wales - Strengths

Vibrant interconnected, self aware sector

Access to key opinion leaders and facilities

Close collaboration between A,B and C sectors

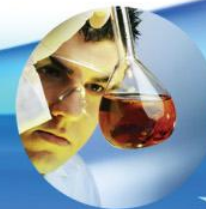
Some globally recognised academic expertise

Academia engaged with industry

Smaller and leaner engaged NHS

Strong Government support – New life science team

Location within Europe – Strong presence of organisations and services required for market entry



Wales - Challenges

Improving access to medical device trials and evaluation

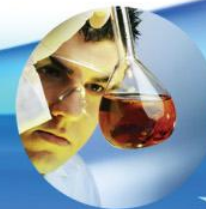
Building an attractive inward investment picture

Linking clinical, academic and industry strengths

Turning “talking a good game” into results

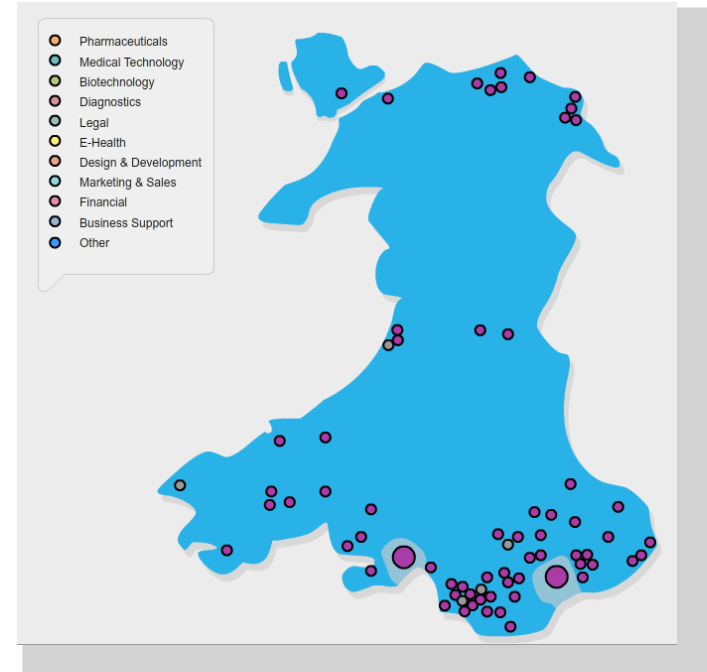
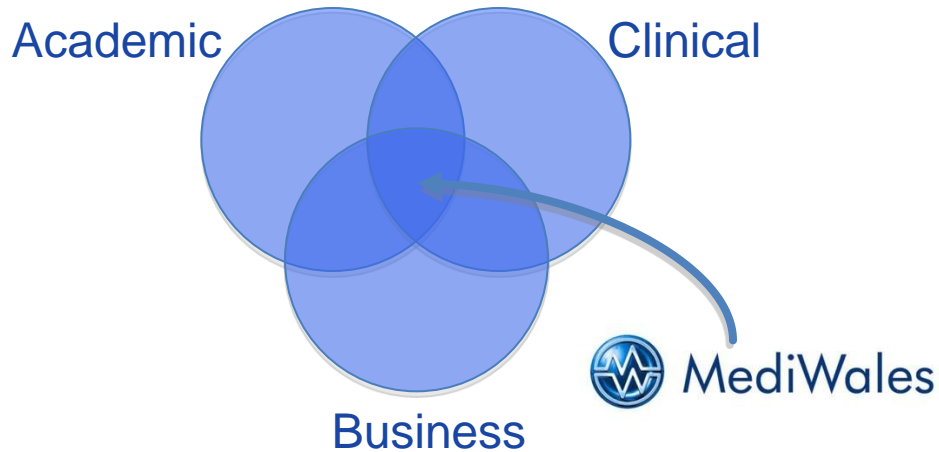
Becoming a stepping stone into the European markets

Playing a role in the growing global market



MediWales

ABC



Established 1992

140 members from Industry, academic and clinical organisations in Wales

Owned by its members with directors drawn from senior members of the sector

Delivering Networking Representation and Communication



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NHS

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MATCH expectations: Your medical device, what's it worth?



MediWales
The Review
HEALTHCARE INNOVATION AND BUSINESS
FEATURING: BIOWALES AND ARAB HEALTH

BIOWALES
The ever-growing Welsh bioscience event

ARAB HEALTH
Company Directory

SHOWCASING:
Ultrasound Technologies Ltd,
Sterilin Ltd,
The Magellan Company Ltd

REWARDING SUCCESS
2008 MediWales Innovation Award winners



MediWales - Activity

Direct Support

Telephone, email and face to face support, advice referrals and information.

Sector Intelligence

Sector statistics collected through ongoing CRM database activity, on the ground knowledge and desk research. Disseminated through in bespoke reports, presentations and publications.

Advising UK and Welsh Government

BETS – Life Science Team – Sector Panel

NISCHR Advisory Board

NISCHR AHSC – Implementation Group and Industry Strategy Task and Finish Group

BIS – Sector Database Data Partner

UKTI – Regional Stakeholder

WG Chief Science Advisor – Input into Science Strategy for Wales

MediLink UK – Board Member

POWIS – Industry Panel

EHI2 – Steering Group



MediWales - Membership

Admission to regular seminars, events and Annual Awards Dinner
Free insertion of press releases and editorial in quarterly magazine, and web site
Listing in annual Members Directory and online directory
Ongoing support and representation

1:Corporate: £600.00 - company of 250 employees or more.

2:Organisational: £450.00 - SME/organisation/academic department with fewer than 250 employees.

3:Small organisational: £200.00 - organisation/sole trader with fewer than 3 employees.





Improve patient care
Reduce healthcare costs
Deliver economic growth

Thank you

