



MEDICAL TRAVEL
SUMMIT 2015

DEVELOPING MARKETS IN ASIA

DAY 2: LANDS OF OPPORTUNITY
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Lands of Opportunity: DEVELOPING MARKETS IN ASIA

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15 April 2015

Global Cross-Border Patients Mobility

Medical travelers by point of origin

- Africa
- Europe
- Middle East
- Oceania
- Asia
- Latin America
- North America

The global medical tourism industry was estimated at USD10.5 billion in 2012. It is expected to grow at a CAGR of 17.9 per cent from 2013-19 to reach USD32.5 billion in 2019.

Source : Medical value travel in India FICCI Heal Conference



Source : The McKinsey Quarterly 2008



- Arrivals expected >10 mil. by 2015, with US\$ 10 bil.
- Market to double by 2015 from 2011.

Thailand:

- Leader with >40% share in Asia in 2011.
- 2012 – 2.53 mil.
- Expected to be more than double by 2015 from 2011.

Korea:

- Fast-growing
- 2013 à 399,000 arrivals

India:

- 2009à 2011, 30% growth
- 2013 à 1.27mil.
- By 2015, nearly ½Mil medical tourists annually.

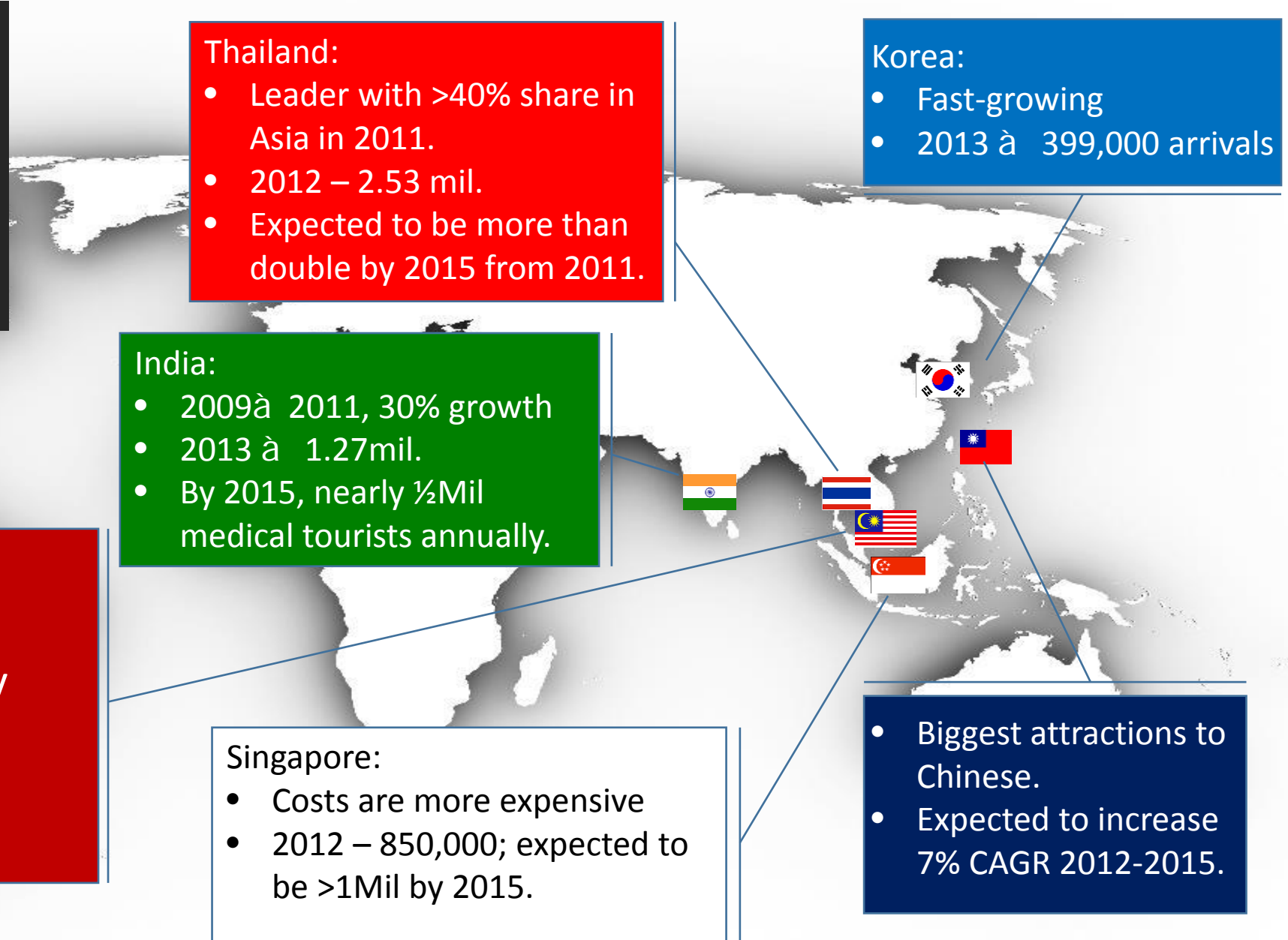
Malaysia:

- 2015 à 1 mil. arrivals
- Top in healthcare category under 2015 Annual Global Retirement Index by International Living USA

Singapore:

- Costs are more expensive
- 2012 – 850,000; expected to be >1Mil by 2015.

- Biggest attractions to Chinese.
- Expected to increase 7% CAGR 2012-2015.



- 1. Currency fluctuation** - recent currency fluctuation in the global market gives cost advantage for medical care in Asia.
- 2. The rise of other regions medical tourism destinations** – such as European and South American – could pose direct threat to Asian destination in luring high spending western medical tourists.

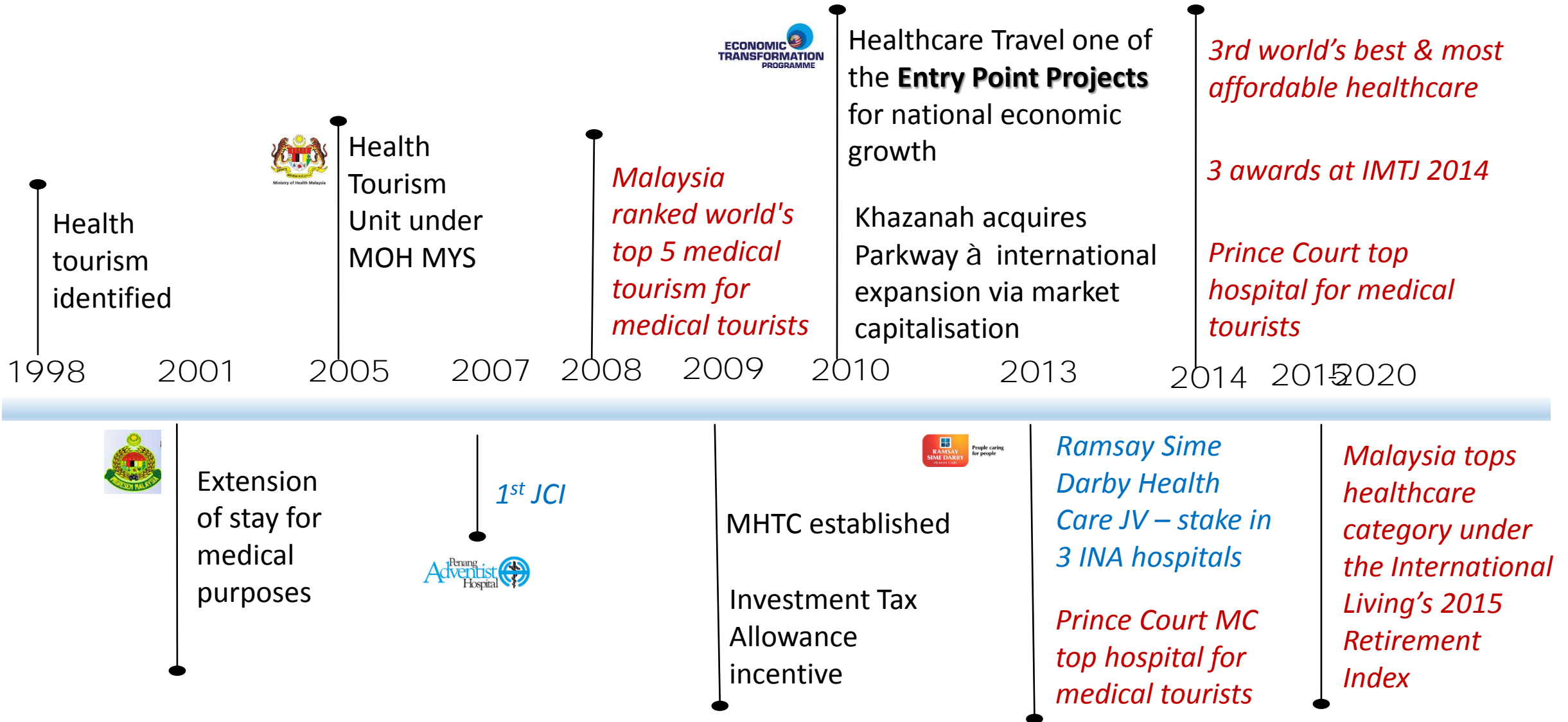
1. Increasing demand for healthcare services from developed countries (eg. UK, US, Australia)
2. Rising medical costs in developed countries – Asian medical tourism indicate a cost saving between 30-90%
3. Non-availability treatments in home countries
4. Long waiting period (e.g. Open heart surgery, joint replacement, etc.)
5. Aging of the affluent baby boomer generation

Role 1: Public healthcare services provider

Role 2: Regulator

Role 3: Facilitator

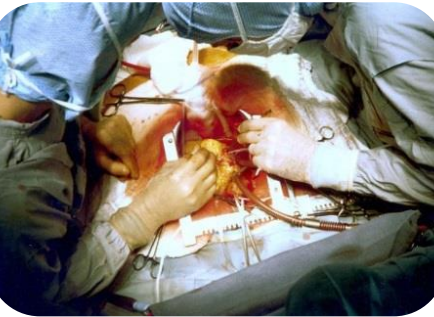
Facilitate and promote the development of the private healthcare industry by providing stewardship and creating a conducive political, economical, social and regulatory climate for the healthcare industry to operate and grow.



Malaysian healthcare... The many firsts in Asia



First in Asia to adopt a catheter based new procedure to treat hypertension (IJN, 2011)



First in Asia to perform stem cell transplantation for end-stage heart disease (IJN, 2003)



First in Asia to use Varian Trilogy System for radiation therapy (NCI Hospital, 2006)

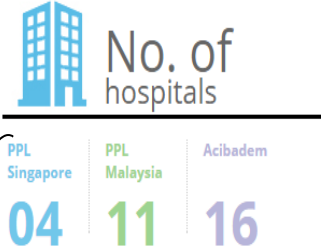


Rewarded the Frost & Sullivan 2013 Excellence in EMR implementation (Ramsay Sime Darby, 2013)



IHH Healthcare Berhad

H \ Y k c f d largest listed healthcare operator



Parkway Pantai Limited
(Mount Elizabeth, Gleneagles & Pantai
Group of hospitals in Singapore,
Malaysia)

Acibadem Saglik Yatirimlari Holding AS
(Turkey leading private hospitals network)

Apollo Hospitals Enterprise Ltd
(> 10% stake)

Å U healthcare operations and investments in the
PRC, India, Hong Kong, Vietnam, Brunei and
Macedonia

KPJ Healthcare

Manages:

- *2 hospitals in Indonesia*
- *retirement home in Australia*
- *Sheikh Fazilatunnessa Mujib Memorial KPJ Specialist Hospital*

*Stakeholder:
a Thailand hospital*

- MOH monitors all safety requirements, outcomes and performance under the **Private Healthcare Facilities and Services Act 1998 and Regulation 2006**
- Medicines (Advertisement & Sale) Act 1983
- 13th Fee schedule of PHFS Act 1998 provides for maximum chargeable fee for professional fees
- Traditional & Complementary Medicine is now regulated too
- Vigorous evaluation and selection - only MHTC membership – 78 out of 268 facilities

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THANK YOU