



The Israel Export & International Cooperation Institute

Israel

Inspired by *innovation*

Life Science Industry



Israel's Life Science Industry

Meeting Global HealthCare Challenges



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- **HealthCare Costs are Soaring**, reaching upwards of 11% of the GDP in Europe and 16% of the GDP in the United States.
- **Populations are Aging** and their numbers are increasing. The oldest members of the baby boom generation (1946 – 1964) in North America, Europe, Asia and Australia have reached 65.
- **The Emerging Middle Classes** in China, India and other developing countries now demand better, higher quality medical care.

There is a critical need to lower healthcare costs!



Israel's Life Science Industry

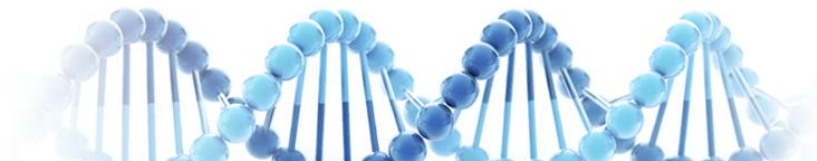
Meeting Global HealthCare Challenges



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To address and meet these challenges, governments, organizations and the HealthCare Industry itself are all moving the market in new directions:

- Technological advances enable the **shift** of treatments and procedures **from inpatient to outpatient home care**.
- The growing **emphasis on early diagnostics and preventive medicine** today helps to control the soaring costs of healthcare services.



*Meeting Global HealthCare **Challenges***

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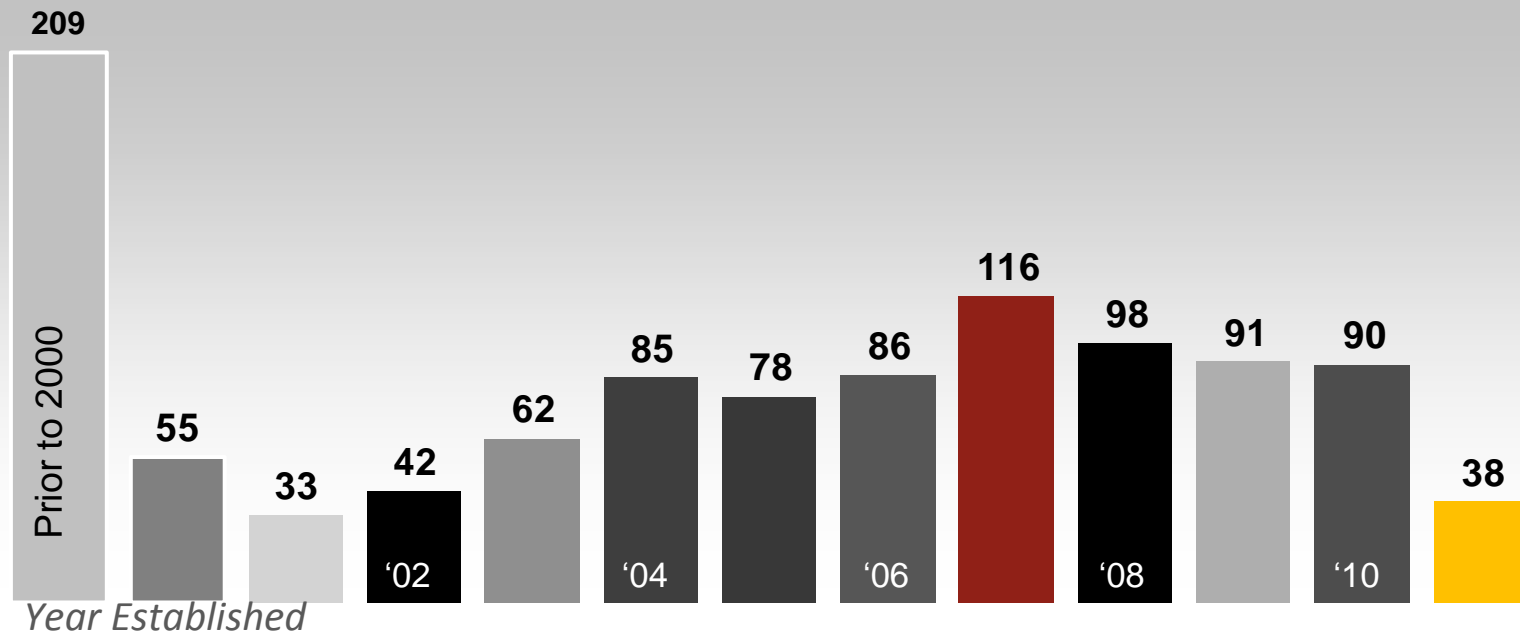
In Numbers



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Prior to 2000 – **200** companies.

2011 – over **1200** companies.



About **40%** of all LS companies established during the last **6** years.
70 – 80 new companies established each year.



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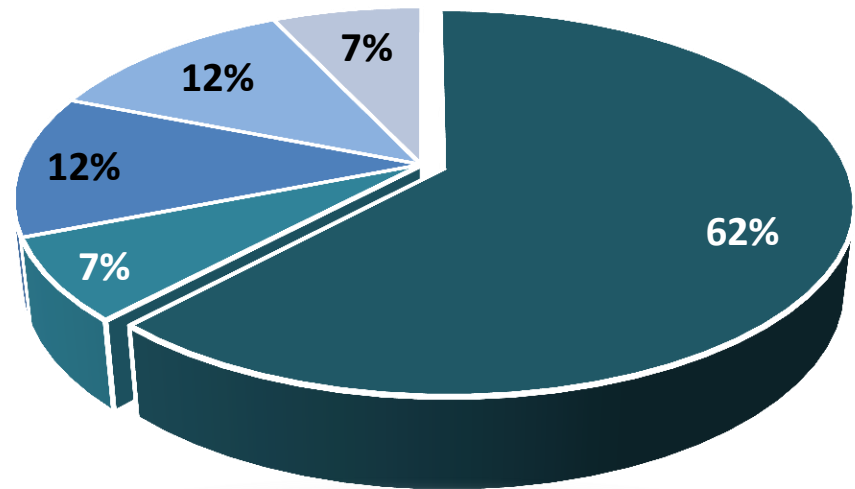
by Sectors



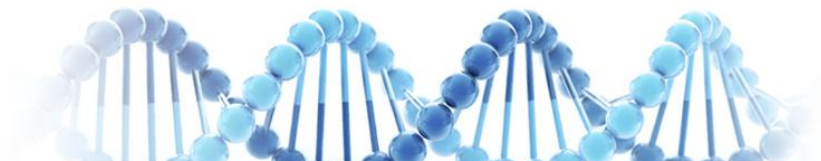
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LS Industry by Sectors:

- Medical Devices – 62 %
- HealthCare IT – 7 %
- Biotechnology – 12 %
- Pharmaceuticals – 12 %
- LS Services – 7 %



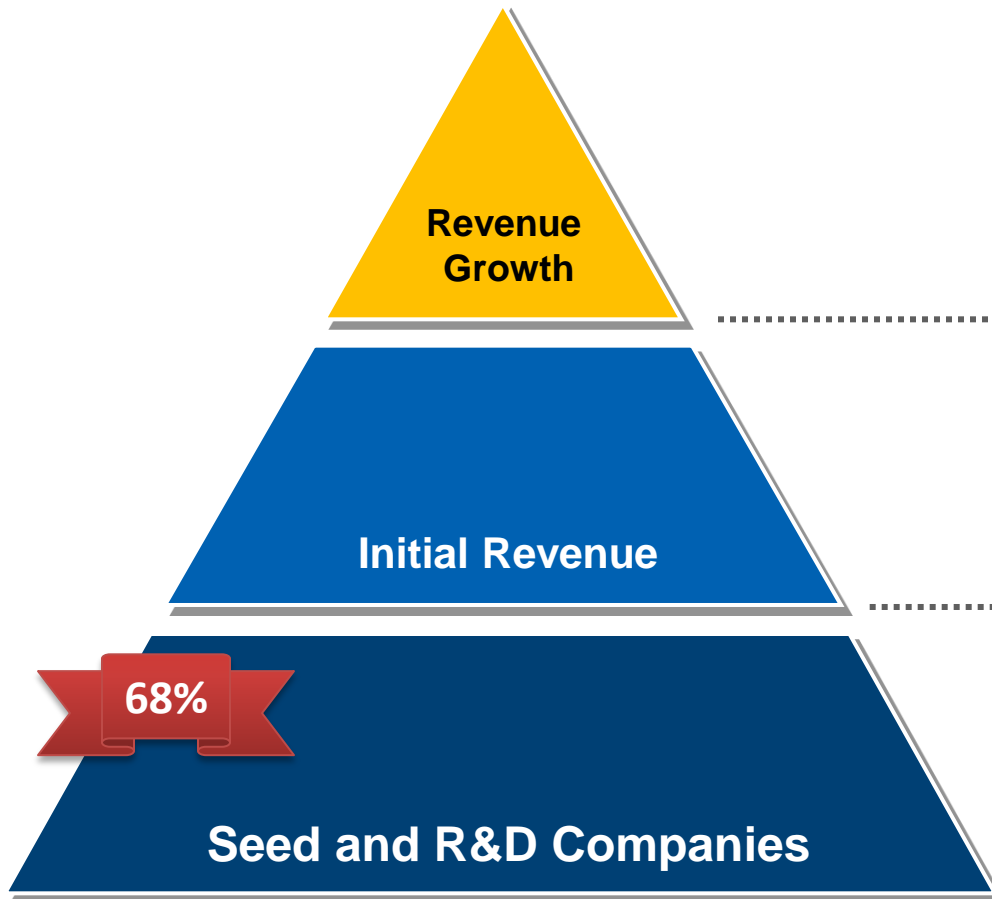
More than **80** LS Service companies: CROs, Engineering, Labs, Bankers and Lawyers; help successfully develop and commercialize innovative ideas.



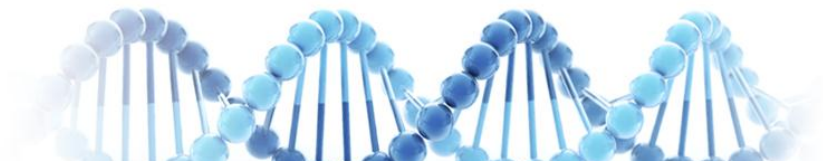
Israel's Life Science Industry *by Stages*



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- Numerous Israel's Medical Devices Innovations have been adopted worldwide.
- More than 30% of Companies have reached the Revenue Stage.
- Rich Pipeline of Seed and R&D Companies promises further growth.



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Meeting Global HealthCare Challenges



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As a recognized leader of creative developments in the world of high tech, Israel has become a leading provider of innovative solutions in the Life Science arena:

- Devices for improved inpatient and ambulatory care
- Biomarkers for accurate and earlier diagnostics
- HIT for monitoring the elderly and patients in rural communities
- Paving the way towards personalized medicine in the future



“Israel is among the world leaders in the usage of Information Technology (IT) in Healthcare” (Gartner)



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Wealth of Clusters



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Diagnostics	125	Cardiovascular	110
Healthcare IT & Telemedicine	110	Dental	70
Imaging	60	Derma & Aesthetics	40
MIS	50	Oncology	40
Monitoring	40	Orthopedics	40
Drug Delivery	50	Women's Health	30



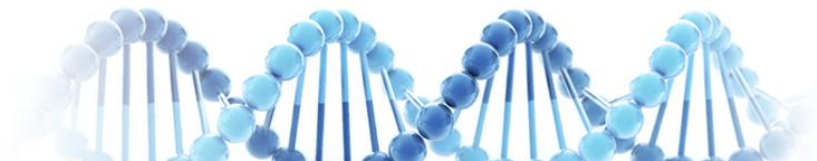
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The Global Competitiveness Index 2011 - 2012



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INDICATOR	RANK
* Venture capital availability	2
* Strength of investor protection	5
Firm-level technology absorption	6
Governmental procurement of advanced tech products	6
Nature of competitive advantage	8
* Quality of scientific research institutions	1
* Utility patents granted/million pop.	4
* Capacity for innovation	6
Corporate spending on R&D	8
University-industry collaboration in R&D	7
Availability of scientists and engineers	10



Israel's Life Science Industry

Industry Drivers



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- Technology Transfer Organizations (TTOs)
- Commercialized defense technology
- Healthcare system
- Strong entrepreneurial spirit
- Powerful VC community
- Highly skilled workforce
- Institutional incentives



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Virtual “start-up machine”



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More than **20** Incubators throughout the country hosting up to **15** companies each.



BIOLINEARX



Israel Technological Incubator Network [link](#)

Provide administration, legal and business development services for the first 2 years of company life when risk is the highest and private funding is scarce.



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Wells of Novelty



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5 hospital-linked TTOs:



The Tel Aviv Sourasky
Medical Center



ITTN – Israel Technology Transfer Organization
Network [link](#)

7 university-associated TTOs:



RAMOT
AT TEL AVIV UNIVERSITY LTD.



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Industry Drivers



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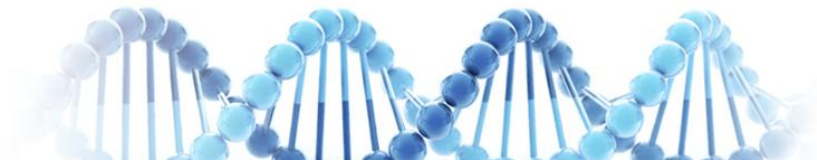
In Medical Devices arena, Israeli scientists and engineers have integrated advanced technologies in Electronics, Communications and Electro-optics to develop world-class innovations in digital imaging, medical lasers, telemedicine, diagnostic and surgical equipment.

Electronics

Communications

Electro-Optics

- Digital Imaging
- Medical Lasers
- Electro-Medical Devices
- Telemedicine
- Surgical Equipment
- Diagnostic Kits
- Rehabilitation Equipment



Israel's Life Science Industry

Wealth of Clusters



The Israel Export & International Cooperation Institute

- Diagnostics (125)
- Healthcare IT & Telemedicine (110)
- Imaging (60)
- MIS (50)
- Monitoring (40)
- Drug Delivery (50)
- Cardiovascular (110)
- Dental (70)
- Derma & Aesthetics (40)
- Oncology (40)
- Orthopedics (40)
- Women's Health (30)



Israel is ranked **1st** for Medical Device patents

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Multinationals | Operate Israeli Subsidiaries or Manage Israeli R&D Centers.

Telecom



New Media



Software



Electronics



Life Science Medical Devices



Life Science Bio & Pharma





MINISTRY OF FOREIGN AFFAIRS



Foreign Trade Administration
Ministry of Industry, Trade & Labor



Israel Export Institute



MEDinISRAEL

The 2nd International Summit
Medical Devices & HIT

June 11–13, 2013, Tel Aviv, Israel

Plan now to attend!





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Thank You

We look forward to seeing you in Israel

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