REDEFINE HEALTHCARE
AGENDA

Overview

Problems

Solutions
ASEAN Overview - An Aging Population

CAGR 2013-2018 of Population in 6 ASEAN countries with Asia & The World (%)

CAGR 2013-18 Population ages 65 and above (% of Total Population)
ASEAN Overview - An Aging Population

Population ages 65 and above (% of total population) in ASEAN Countries

2016 ASEAN TOTAL POPULATION (%)

- Others: 90.40%
- The Elderly: 9.60%

2050 ASEAN TOTAL POPULATION (%)

- Others: 79.00%
- The Elderly: 21.00%

An Aging Population
ASEAN Overview - An Increase in Healthcare Cost

Current Health Expenditure per Capita in 9 ASEAN Countries (current US$)

CARG 2013-2018 of Health Spending in 6 ASEAN countries and The World (%)

- Cambodia
- Vietnam

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<td>1,084.86</td>
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- 2013: 1,084.86
- 2014: 1,275.14
- 2015: 1,316
- 2016: 1,316
- 2017: 1,316
- 2018: 1,316
- 2019: 1,316

- 2013: 15.18
- 2014: 2,303.54
- 2015: 2,462.39
- 2016: 2,462.39
- 2017: 2,462.39
- 2018: 2,462.39
- 2019: 2,462.39

- 2013: 9.37
- 2014: 214.38
- 2015: 221.92
- 2016: 221.92
- 2017: 221.92
- 2018: 221.92
- 2019: 221.92
An Aging Population

Population Transition

ASEAN's aging population will increase the strain on healthcare spending and healthcare need.

Healthcare Cost Increase

A crisis in the healthcare systems if the ability to spend on healthcare & management of healthcare & its cost cannot dramatically improve.
#1. Lack of innovation with medical devices across ASEAN make those devices expensive and hinders people’s access

More than **90%** of ASEAN’s medical devices are **imported**. **Thailand** imports **97%** of its medical devices & **Indonesia**, more than **94%**.

The penetration of medical devices in **ASEAN** is still **relatively low** compared with penetration rates in other markets in **Asia** and **rest of the world**.
#2. High out-of-pocket health spending led to low affordability of medical services & medical devices

Out-of-pocket expenditure (% of current total health expenditure)

Out-of-pocket spending still dominates the healthcare spending in most countries in ASEAN.

In 2016, Myanmar’s out-of-pocket spending accounts for 73.98% total healthcare expenditure.

Except for Thailand (12.1%), other countries' out-of-pocket spending remains high.
#3. Low number of healthcare workforce & hospital equipment lower the efficiency in providing health services

Most countries in ASEAN have very low density of bed (Indonesia & Philippines have respectively 1 & 1.1 beds per 1000 people) comparing with 3.4 of Asia.

Indonesia has only 0.4 and 1.0 physicians and nurses for every 1,000 people, respectively, compared with the world average of 1.9 and 3.7.
SOLUTION SUMMARY

#1. LACK OF MEDICAL DEVICES’ INNOVATION

#2. HIGH OUT-OF-POCKET HEALTH SPENDING

#3. PROVIDING HEALTH SERVICE INEFFICIENCY

HEALTHCARE COST & INSURANCE SUPPORT

MEDICAL TECHNOLOGY DEVELOPMENT

DIGITAL HEALTHCARE SYSTEM ENHANCEMENT
SOLUTION 1: MEDICAL TECHNOLOGY DEVELOPMENT

PORTABLE, EASY FOR HOME USE, APPLIED TECHNOLOGY (AI, ID PROTECTION) & COST-EFFECTIVE PRODUCTS DEVELOPMENT THAT MEET LOCAL REQUIREMENTS

PARTNERSHIP WITH ICT COMPANIES TO REACH ASEAN MARKET AT LOW COSTS

INCUBATOR, INNOVATION HUB BUILDING, FUNDING MEDTECH & FUNDING STARTUPS PROVISION
SOLUTION 2: DIGITAL HEALTHCARE SYSTEM ENHANCEMENT

INSTALL DIGITAL HEALTHCARE SYSTEM MODEL (EHR)*.

PROVIDE MOBILE CARE DELIVERY MODELS (EX: TELEMEDICINE) FOR REMOTE FOLLOW-UP PATIENTS

COLLABORATE WITH COMPANIES TO PROVIDE HOSPITALS WITH LOWER-COST EQUIPMENT & MAINTENANCE

*: Electronic Health Records
SOLUTION 3:
HEALTHCARE COST & INSURANCE SUPPORT

SUPPORT NGOS & CHARITIES IN FUNDING ON MEDICAL LOANS

SUPPORT PUBLIC SPENDING ON HEALTH

SPREAD OUT THE IMPORTANCE OF PURCHASING HEALTH INSURANCE BY COMMUNICATION
REFERENCES:

- The Future of ASEAN Time to Act, 2018, pdf, PwC, ProQuest Database.
- Worldwide Medical Devices Market Factbook, 2019, pdf, BMI Research, BMI Database.
THANK YOU

Q&A