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HEALTHCARE & MEDICAL SECTOR IN MYANMAR

FLANDERS INVESTMENT & TRADE MARKET SURVEY

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Market Study

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THE HEALTHCARE AND MEDICAL SECTOR IN MYANMAR

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1. SUMMARY

Myanmar, the second-largest inland country in Southeast Asia, covers 676,552.7 square km with a population of 54.82 million, and with 67 years of life expectancy in 2020. Its GDP reached $53,702 million in FY 2019-2020 and the World Bank forecasts its 3% growth in 2023. The nation's imports were valued at US$19,050.9 million in FY 2019-2020, with China serving as the primary trading partner, alongside other significant partners like Thailand, Japan, the US, and Singapore, showcasing Myanmar's economic importance. In 2021, the EU ranked as Myanmar's fourth-biggest trade partner after China, Thailand and Singapore, accounting for 7.2% of the country's total trade. It exported pharmaceutical products to Myanmar amounted to € 63 million in 2021, and € 84 million in 2022, a remarkable growth of 32.5%.

Myanmar's healthcare sector is provided by both the private and public sectors, majority supplies rely on foreign imports. Recently, Myanmar has undergone drastic moments in the global COVID health crisis, political and macroeconomic landscapes. How is the sector structured and changed? Which are the key fundamental points to know and where are the opportunities for Flemish companies located in this in-depth market study.

2. OVERVIEW OF THE HEALTHCARE SYSTEM

2.1 DEMOGRAPHY

Myanmar's total population was 54.82 million in 2020 with the annual growth rate of 0.87% according to the Myanmar Health Statistics 2020. Myanmar's population by the age groups in million are stated in the below table.

Population Structure	2014		2016		2018		2020	
	No.	%	No.	%	No.	%	No.	%
0-14 years	15.02	28.9%	14.98	28.3%	14.89	27.6%	14.76	26.9%
15-59 years	32.35	62.2%	33.04	62.4%	33.74	62.6%	34.41	62.8%
60 + years	4.62	8.9%	4.90	9.3%	5.24	9.7%	5.65	10.3%
Total	51.99	100%	52.92	100%	53.86	100%	54.82	100%
Female	26.92	51.8%	27.47	51.9%	28.02	52.0%	28.57	52.1%
Male	25.07	48.2%	25.45	48.1%	25.85	48.0%	26.25	47.9%
Sex Ratio (M /100 F)	93.1		92.7		92.3		91.9	

Population Estimates by Age Groups (in million) 2014-2020

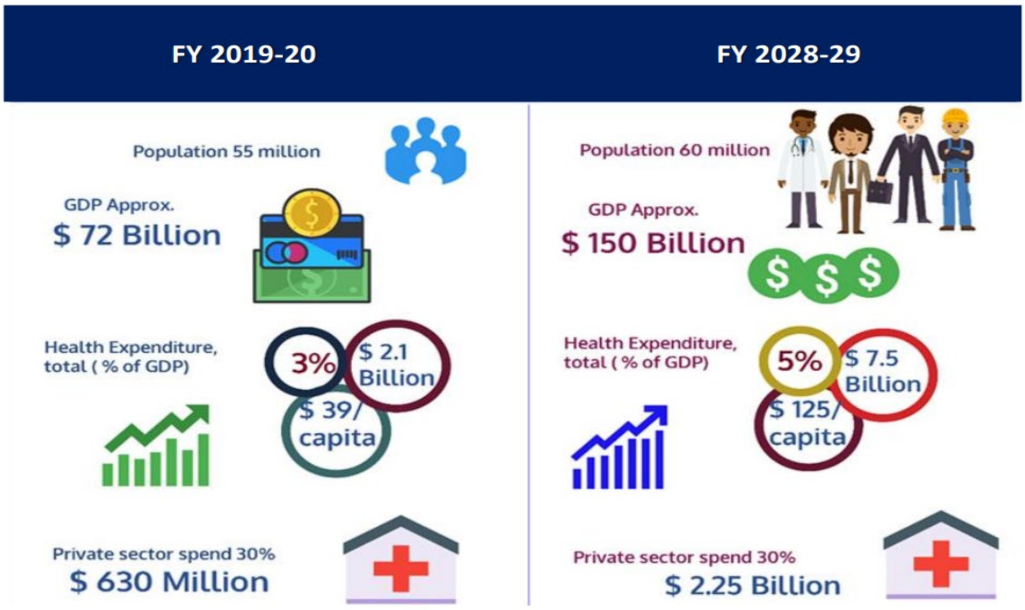
Source: The 2014 Myanmar Population and Housing Census, Thematic Report on Population Projections for the Union of Myanmar, States/Regions. Rural and Urban Areas, 2014-2050. Census Report Volume 4-F, Department of Population, Ministry of Labour, Immigration and Population.

2.2 HEALTH INDICATORS

Life expectancy in Myanmar has risen from 64.7 years in 2014 to 67 years in 2020 for both sexes, as per Myanmar Health Statistics 2020. According to WHO (2020), the four main non-communicable diseases (NCDs) contribute 71% to all deaths, with cardiovascular disease followed by cancers, chronic respiratory disease and diabetes. Meanwhile, the primary causes of hospitalization were pregnancy, childbirth, and puerperium infectious/parasitic diseases, injury/poisoning/external causes, digestive system diseases, and respiratory system diseases according to Myanmar Health Statistics. In addition to health threats raised by WHO, regarding smoking culture and betel chewing are concerned factors in Myanmar.

2.3 HEALTHCARE EXPENDITURE

As per Myanmar Health Statistics, approximately one in five people sought primary health care services from public health facilities in 2019. On the other hand, the total health expenditure increased from € 1,323 million to € 2,096 million from the year 2014 to 2018. As stated by Konema, Myanmar's health expenditure per capita surged from US$ 5 in 2001 to US$72 in 2020, showing an average annual growth rate of 16.93%. According to the World Bank, the per capita income in Myanmar was US$ 1,211 in 2021. The below graph issued by Pun Hlaing Silom Hospitals (PHSH), one of the leading healthcare providers in Myanmar, stated the healthcare landscape forecast in 2028-2029 including health expenditure.



Myanmar Healthcare Landscape Current Vs Forecast

On the other hand, there is an income decline of 9.5% (US$ 1,095.7) in 2022 due to the current political landscape and economic slowdown. It is hoped that the situation will be better and that healthcare, the backbone sector of the country, will gain stability aligned with the previous forecasts.

Due to liberalization of Myanmar's insurance market with 17 life insurers and 9 general insurers, an increasing number of people are opting for health coverage, which helps more people to access superior healthcare services both locally and internationally. Despite the obstacles presented by rising inflation and decreased individual income, this suggests a promising outlook for the growth of medical services within the local context.

2.4 HEALTHCARE PROVIDERS

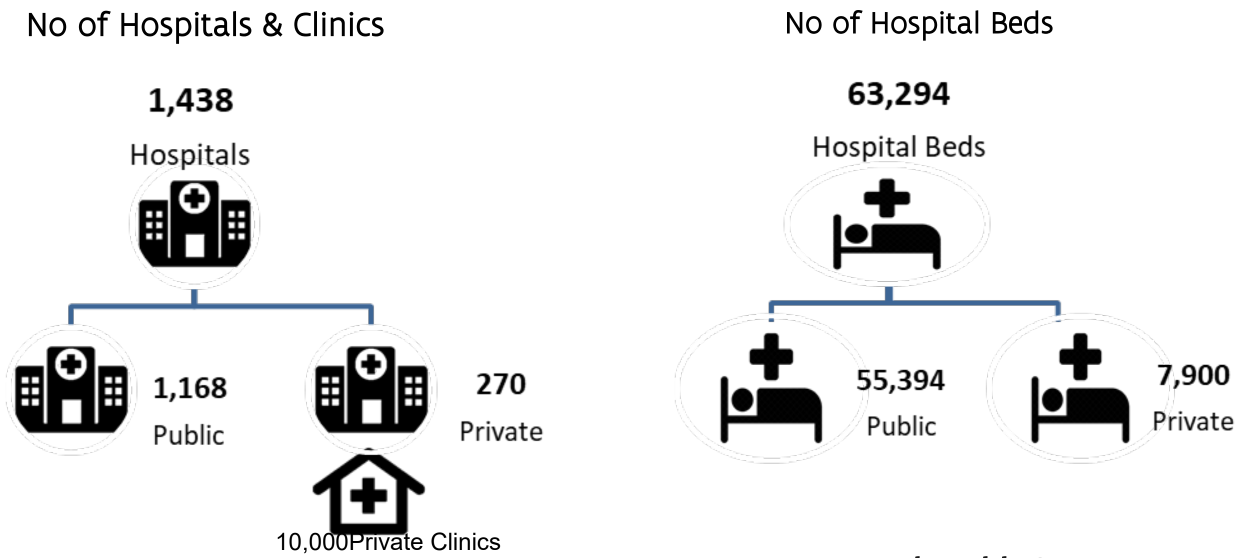
There are three broad categories lying within healthcare providers of Myanmar such as Public, Private and Non-Profit healthcare providers.

- **Public Health Sector:** Myanmar public health sector, under supervision of Ministry of Health (MOH), holds 86% of the total healthcare service in the country. According to Myanmar Health Statistics, there are 1,168 public hospitals with a capacity of 55,394 beds nationwide in 2019. On average, public hospitals in Yangon served over 10,000 outpatient clients and more than 12,000 inpatient patients daily in 2018. In rural regions, where 70% of total population inhabits, primary treatment options are provided by rural health centres, sub-rural health centres and small private clinics operated by both government and non-profit organisations.

- **Private Health Sector:** According to Myanmar Medical Services report of 2022, there are approximately 270 private hospitals and over 10,000 private clinics, which primarily operate in the larger cities such as Yangon, Nay Pyi Taw, and Mandalay. Selected services can be reached to rural areas. Besides, there are many charity hospitals run by private sectors, serving the low-income households in Myanmar. It is still required to expand the healthcare network across the country, and there are business opportunities for private healthcare providers.

Due to the higher health demand against the shortage of facilities, technology, and healthcare professionals, middle- and high-income Myanmar people frequently seek top-tier medical services in neighbouring countries such as Thailand, Malaysia, India, Singapore for their check-ups and treatments, showcasing an increasing demand in healthcare utilization. Oxford Business Group reports that these medical journeys abroad amount to annual expenditure of around US$600 million by Myanmar patients. This situation indicates the crucial need for Myanmar to enhance its healthcare infrastructure, refine its care delivery systems, and enhance the overall quality of healthcare services. Some groups of companies in the healthcare sector are willing to take the opportunity to revise outbound medical tourism and express their interests in upgrading their facilities in medical equipment and in digital technology solutions. Some business leads have recently visited not only local trade fairs but also international trade fairs including Arab Health.

Number of Hospitals and Clinics in Myanmar



- **Non-governmental Health Care:**

Myanmar's healthcare sector receives the attention and assistance from the International Development Community. Community-based organisations, international and local non-governmental organisations such as Myanmar Red Cross Society, civil society organisations provide public healthcare services, working together with Myanmar Medical Association (MMA). The main international organizations providing technical and financial assistances to promote the health status of Myanmar people are the WHO, the United Nations Children's Fund (UNICEF), the United Nations Development Programme (UNDP), the United Nations Population Fund (UNFPA), the Japan International Cooperation Agency (JICA), the Asia Development Bank (ADB) and the World Bank. The United Nations Office on Drugs and Crime (UNODC), the United States Agency for International Development (USAID), the Australian AID, the United Kingdom Department of International Development (DFID), the Korea International Cooperation Agency (KOICA), and the Thailand International Cooperation Agency (TICA) also play certain roles in the support of healthcare systems in Myanmar.

3. MEDICAL DEVICES AND HEALT TECH MARKET

The country heavily relies on imports to meet the growing local demand for quality healthcare products. The imported medical devices cover a diverse range of essential healthcare needs. These include dental appliances, orthopedic appliances (such as crutches, surgical belts, and trusses), fracture appliances, artificial body parts, hearing aids, and other wearable or implanted devices designed to compensate for defects or disabilities. Myanmar's primary medical device imports originate from the United States, India, Turkey, and Sri Lanka. Other significant sources include Germany, the Netherlands, Australia, Japan, Taiwan, and Indonesia. According to Volza's Myanmar Import data, a total of 612 medical device import shipments were recorded as of today, involving 46 Myanmar importers and sourcing from 43 suppliers. Notably, the top three importers are the U.S. (148,033 shipments), India (147,091 shipments), and Turkey (46,082 shipments).

The medical devices market in Myanmar is expected to expand significantly, with a projected market value of US$214 million in 2023. Among the various segments, Cardiology Devices are anticipated to lead with a projected volume of US$32 million, showcasing the growing demand for advanced cardiac care solutions as per Statista. Despite foreign currency exchange rate fluctuations recently, the thriving medical devices and supplies sector in Myanmar, combined with recent import regulatory improvements in August 2022 and the country's reliance on imports, presents a lucrative opportunity for Flemish companies looking to contribute to this vital industry.

3.1 HEALTHCARE TECHNOLOGY

Limited internet access in remote areas makes it difficult to operate telehealth services. According to the report of E-commerce Connectivity in the Myanmar Healthcare sector, 90% of wards and villages in Myanmar have access to mobile, yet only 44% of the total population has internet in the country according to the World Bank. GlobalData said that telecom services revenue in Myanmar was valued at US$2 billion in 2022. The telecom market size is expected to grow at a marginal (CAGR) of 0.8% with enhanced broadband connectivity and boosted mobile adoption. According to 6Wresearch, the telehealth market in Myanmar is anticipated to grow throughout 2020-2026.

The healthcare landscape in Myanmar shows promising opportunities for advancements in medical technology. There are over 30 HealthTech startups in Myanmar as of 2023, which offer healthcare services such as healthcare websites, counselling applications, monitoring and tracking body vitals, platforms for patients, tele-healthcare services and medical record management solutions.

- Evidence-based Care: The Yangon Centre for Evidence-Based Healthcare has been a pioneering force in applying evidence-based healthcare practices in collaboration with JBI, a global research institute headquartered in South Australia, for over 15 years.

- Predictive & Personalized Healthcare: Pun Hlaing Hospital has taken a significant step forward with the launch of the "Live Healthy 4P Clinic." This initiative uses the 4P medicine model (Predictive, Preventive, Participatory, and Personalized) to deliver customized healthcare programs and services. Such efforts pave the way for more comprehensive and individualized patient care, indicating an avenue for Flemish businesses to contribute.

- Home-Based and Telemedicine Services: Mobile clinics, predominantly in the private sector, offer home-based healthcare services, catering to elderly individuals with screening, consultations, and treatments provided by a team of healthcare professionals. Additionally, the deployment of telemedicine services in regions with accessible mobile networks has ensured broader reach, highlighting the effectiveness of such services in reaching a larger population.

- HOPE telecare, a joint venture with a local company and a Malaysian company, for telemedicine services. It will include a digital healthcare platform for public users to access healthcare professionals and information, as well as a blockchain to store records, and to develop a digital signature system.

- Health and Mobile Apps: The vibrant landscape of health and mobile apps in Myanmar is largely driven by start-up companies. This dynamic environment provides opportunities for innovative health applications, enabling efficient healthcare access and solutions for a tech-savvy population.

- Klenic, a cloud-based web platform software, for improving the hospital management technology such as digitizing medical records and queuing management.

4. PHARMACEUTICAL MARKET

The pharmaceutical market in Myanmar holds significant competitive potential within the ASEAN region, drawing increasing interest from Flemish companies while maintaining a heavy reliance on imports. The Myanmar Chamber of Commerce for Pharmaceuticals & Medical Devices (MCCPMD) reports that a substantial 90% of medicines and medical products are sourced from foreign markets, and annual importation includes more than 5,000 categories of medicines. In FY 2022-2023, Myanmar imported medicines and related products amounting to **US$171.565 million from India**, **US$53.137 million from China**, and **US$44.129 million from Thailand**, as disclosed by the Ministry of Commerce. Additionally, Belgian brands, including **Fysiomed** and **Alcon Couvreur N.V**, have established a presence in the market through distribution by Snow Everest Co., Ltd and Grand Pharmaceutical Co., Ltd. Notably, Myanmar imported pharmaceutical products worth **US$14.52 million from Belgium in 2022**, as per the United Nations COMTRADE data. Despite price fluctuations due to inflation (from 5% - 10%) (source: Global New Light of Myanmar), the import trend is expected to persist, offering an enticing opportunity for Flemish pharmaceutical product providers.

India stands as the primary supplier, accounting for 40-45% of total imports, closely followed by Bangladesh, China, Thailand, Indonesia, Pakistan, and Vietnam, as revealed by research conducted by Trust Ventures Partners. Furthermore, Myanmar imports pharmaceuticals from the USA, Korea and Europe such as Germany, Belgium.

In the Myanmar pharmaceutical landscape, over 100 pharmaceutical distributors operate, with market leaders such as Mega Lifesciences (Thailand), DKSH (Switzerland), Sealion (Myanmar) and so on. Notably, pharmacy sales in Myanmar are primarily dominated by the Yangon and Mandalay regions, collectively representing 60% of the total market. Government adopts a tender system to procure medicines for its hospitals, in the acquisition of medical supplies, equipment, and services.

The domestic manufacturing pharmaceutical industry is currently in its early stages, fulfilling only 10% of the demand. There is a state-owned Burma Pharmaceutical Industry (BPI), and other remarkable private manufacturers include Sun Pharma (India), AA Medical Products (Myanmar), Zifam Myanmar (Australia), as well as traditional medicine producers such as FAME Pharmaceutical (Myanmar) and June Pharmaceutical (Myanmar).FAME Pharmaceutical stands as the market leader in traditional medicines, even exporting to neighboring countries. In 2022, Myanmar exported pharmaceutical products worth US$8,450 to Malaysia, as indicated by the United Nations COMTRADE database. The technology and collaboration in this area opens a wide business opportunity for Flemish companies.

However, the issue of counterfeit products threatens the population and market competition in the country. In 2017, Yangon disposed of counterfeit medicines worth over US$1.32 million, as reported by the Myanmar News Agency. Myanmar has committed to international cooperation against the counterfeit medicine trade since 2018. Nevertheless, the rise of e-commerce and social media during the COVID-19 pandemic has facilitated the distribution of counterfeit drugs in Southeast Asia, including Myanmar, with millions of daily orders on these platforms, as reported by the SEA IP SME Helpdesk.

5. MARKET OUTLOOK AND OPPORTUNITIES

The healthcare sector in Myanmar faces several significant challenges that have a profound impact on the delivery of healthcare services. Among the most pressing issues are the weak enforcement of rules and regulations, still limited public health insurance coverage, challenges in the timely delivery of medical supplies across the country, and a shortage of healthcare providers. Besides, current operational challenges for importers to Myanmar are the slower administrative process concerning license approvals, and the high inflation rate. For Flemish companies seeking to operate in Myanmar's healthcare sector, it is crucial to engage with reliable local business partners. This step ensures a comprehensive understanding of the updates on the regulations and facilitates a smoother entry into the market.

However, there are First-Mover Advantages in this highly underserved market, especially given the increasing aging population of 54 million, high disease prevalence, growing demand for healthcare services and medical devices by the population as well as local healthcare providers. Therefore, Flemish companies have promising avenues for offering solutions to local healthcare providers (Leads), especially in various areas:

- Medical Devices: Majority import reliance market, especially for diagnostic tools and imaging systems.
- Pharmaceutical Product Supply: Meeting the demand for high-quality pharmaceuticals in Myanmar presents a strategic opportunity for Flemish companies.
- Medical Equipment Importation and Supplies: The healthcare facilities and pharmaceutical manufacturers in Myanmar require a steady supply of medical equipment and accessories.
- Technical Expertise: With a growing demand for advanced healthcare solutions, technical expertise in fields like big data, cloud computing, artificial intelligence (AI) for patient care management, robotics, and evidence-based care
- Cutting-edge Medical Services: predictive and personalized healthcare systems, innovative home-based services, device-based solutions, telemedicine platforms, and health-focused mobile applications
- Healthcare Infrastructure Design and Management: The increasing awareness and willingness of the healthcare providers for expanding and improving their healthcare facilities development

By capitalizing on these diverse opportunities, Flemish companies can contribute to Myanmar's healthcare landscape while achieving meaningful business growth. Besides, the healthcare sector has shown some stability from some regulatory reliefs recently. Private hospitals and healthcare importers are willing to explore advanced diagnostics, upgraded treatment approaches, medical services, healthcare infrastructure, digital transformation in hospitals, and the establishment of private medical institutes and training centers.

6. MARKET APPROACH AND DISTRIBUTION CHANNELS

The market approach for Flemish companies entering into the Myanmar healthcare sector involves a strategic and comprehensive master plan, tackling the dynamic changes in the country's healthcare environment. To access this market, you need to follow the right channels, exercise patience and build good commercial and trust relationships.

- **Market Evaluation:** Flemish companies may assess the market landscape for a particular healthcare product through the prospective meetings with private hospitals, market leader companies, health tech companies and government associations to fulfill specific market demands.

- **Partnership Cultivation:** Flemish companies can strengthen strategic partnerships with Myanmar distributors and health tech entrepreneurs to gain valuable market insights and establish a credible brand presence.

- **Navigating regulations:** Flemish companies can ensure compliance with Myanmar's dynamic regulations and import protocols through the collaboration with relevant industry associations and local importers, streamlining the process of introducing their products to the Myanmar market.

The distribution channels in Myanmar are gradually improving, particularly with the international logistic service providers. Yangon region serves as a dominant distribution center for goods which are brought in by sea and air, while Mandalay region plays a vital role for cross-border trades from China and Thailand. Yangon port is a major distribution hub, managing more than 90% of the country's regular maritime exports and imports.

7. LEGISLATION

7.1 IMPORT LICENSE APPLICATION PROCESS

Flemish companies must complete import license applications through Myanmar Tradenet 2.0 portal or the Border Trade Online System (BTOS) for import license processing at border posts. License requirements are reviewed annually, with occasional changes throughout the year. The Myanmar Customs Information System (MCIS) and Myanmar Automated Cargo Clearance System (MACCS), managed by the Ministry of Planning and Finance (MOPF) are oversee the operations. In June 2023, the government made amendments to the types of commodities that will be imported under the Automatic Licensing System and Non-automatic Licensing System through border trades. Out of the various commodities transported through shipping, 1,525 types including pharmaceutical goods regarding dental filling, first aid boxes/kits, Laboratory, hygienic or pharmaceutical glassware, whether or not graduated or calibrated, will now be governed by the Automatic Licensing System. To find out types of commodities for a specific import license, please visit this link.

7.2 PROHIBITED GOODS

Myanmar prohibits the importation of certain goods,, which are subject to frequent and sometimes sudden changes. To gather an update list, please contact the FIT office.

7.3 IMPORT TARIFFS

Myanmar, as a member of the World Trade Organization (WTO), has limited coverage of its goods and services under international tariff standards. However, its tariffs are generally comparable to or lower than other regional countries, ranging from 0 to 40%. For detailed custom tariff rates for healthcare related items, visit the Customs Department website.

7.4 LABELING REQUIREMENTS

Myanmar follows Codex guidelines and ASEAN Common Principles for food labeling. As per the Consumer Protection Committee Directive, labels on pharmaceuticals together with telecommunication products, diet products, commodity products, and business activity products must include specific details in the Myanmar language, either alone or combined with another language.

Due to the complexity and continuous evolution of import laws and regulations in Myanmar, many importers rely on the expertise of professionals such as freight forwarders and customs brokers to handle and manage their import transactions. It is recommended to the FIT office for timely updates.

8. TRADE SHOWS

Myanmar

Name: MEDEX Myanmar and Pharmatech Myanmar 2023
About: Myanmar International Medical and Pharmaceutical Equipment & Supplies Exhibition
Date : 5 -7 Oct 2023
Venue: Myanmar Expo Hall at Fortune Plaza, Yangon, Myanmar
Website: https://10times.com/medex-myanmar
Frequency: Triennial

Name: Lab Myanmar 2023
About: International Exhibition & Conference on Laboratory, Analytical, Biotechnology and Scientific Instruments & Technology in Myanmar
Date: 5 -7 Oct 2023
Venue: Myanmar Convention Center, Min Dhamma Road, Yangon, Myanmar
Website: www.neventum.com/tradeshows/myanmar-lab-expo
Frequency: Annual

Name: International Conference on Health Care Reform, Health Economics and Health Policy
About: International Conference on Health Care Reform, Health Economics and Health Policy aims to provide the opportunity for direct communication between young researchers and affiliated personalities to discuss their knowledge on the subject and build connections.
Date: 14 Nov 2023
Venue: Bago, Myanmar
Website: https://conferencealerts.co.in/event/1879044

Singapore

Name: Medical Fair Asia 2024
About: the region's leading healthcare event that connects you both in-person and digitally to a global MedTech audience. For the latest in healthcare technology and innovations, medical equipment, medical manufacturing, supplies and solutions. FIT Myanmar will engage with local importers to visit the fair and try setting up B2Bs with Flemish companies.
Date: 11 Sep - 13 Sep 2024
Venue: Marina Bay Sands, Singapore
Website: www.medicalfair-asia.com

UAE

Name: Arab Health 2024
About: Arab Health is the most significant event for the healthcare industry that plays an instrumental role in bringing together regional and international policy drivers, thought leaders, and healthcare professionals through trade and innovation.
Date: 29 Jan - 1 Feb 2024
Venue: Dubai World Trade Centre
Website: https://www.arabhealthonline.com/en/Home.html

9. LIST OF IMPORTERS, ASSOCIATIONS AND RELEVANT AUTHORITIES

Please contact the FIT Yangon office for more information on this.

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