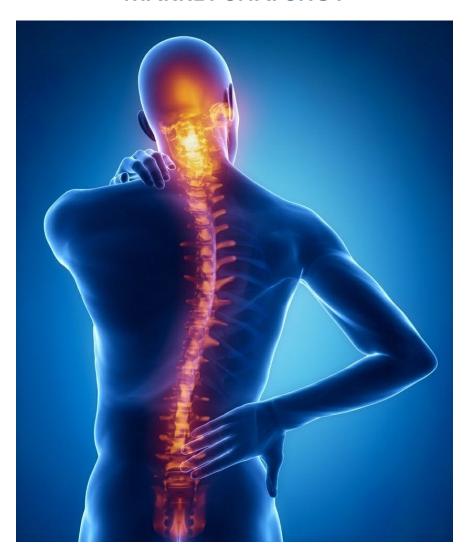


PAIN RELIEF RADIOFREQUENCY ABLATION MARKET SNAPSHOT



RUSSIA 2020

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Is there a pain relief market in Russia?

In recent years, the number of patients with pain of various localization has been growing. Specialists from pain treatment clinics come to help such patients.

Chronic pain is called pain that lasts for more than 3 months. This condition affects 20% of the World's population, which is every 5th inhabitant of the planet. The leading three chronic pain syndromes: headache, joint pain and back pain.

In 1961, the first pain clinic was established in the United States, which brought together specialists who are well aware of the nature of pain syndromes, the mechanisms of their occurrence and formation, methods of diagnosis and treatment. The concept of these clinics is that the pain syndrome is not considered as a concomitant symptom, but as a disease that deserves close attention.

This is a fairly new idea for Russia. About 5 years ago, modern clinics using high-tech methods began to appear. There are not many of them yet, and not all patients and even doctors know about the existence of such clinics. According to the Association for interventional pain management, Russia now has about 15-20 full-fledged clinics with high-tech equipment. While in the US there are about 3000, in Spain and Israel-150-200.

What is holding back the growth of the pain relief market?

In a number of countries, such as the United States, Israel, and Ireland, this is a separate specialty. There is no such specialty in Russia yet. One of the main goals of the Russian Association for interventional pain management is that it should appear in Russia as well. Now pain syndromes are mainly dealt with by doctors: anesthesiologists, neurologists, neurosurgeons or orthopedists.

In 2019, the Russian government was addressed a resolution on the need to create pain treatment services in major hospitals in the country. This was followed by a round table session in the State Duma devoted to legislative aspects of treatment of patients with chronic pain syndromes. It is necessary to create a legal framework to ensure the safety of patients and doctors in the treatment of chronic pain. We need to develop tariffs for analgesic care so that it can be provided to people within the framework of the MHI, and we need to create educational centers to train specialists. In the near future, Russia plans to introduce three levels of care – pain rooms at polyclinics, where patients with moderate severity can be sent to pain clinics for further examination and therapy, while severe pain syndromes will be dealt with by pain centers and departments based on multidisciplinary clinics

Private stakeholders at the Pain Market

Private clinics are also developing this niche. Some specialize in the treatment of pain of certain localities, while others struggle with chronic pain of various types.

The demand for specialized services, even indirectly, is confirmed by Yandex statistics. Monthly users enter the query "pain treatment" 186.7 thousand times, the phrase "pain treatment" - 64.3





thousand, "pain causes treatment" - 59.8 thousand. For comparison, one of the most popular plastic surgeries – breast augmentation-is requested 55.5 thousand times a month on the same resource.

The niche includes both interregional networks, such as Alfa health Center, and local ones, such as Medica group of companies in Saint Petersburg.

The pain management clinic itself is interesting for future franchisees

Private clinics estimate the profitability of such centers at 6% in the first year of operation and up to 32% in the third. Thus, the cost of radiofrequency ablation ranges from 30 to 50 thousand rubles.

Radiofrequency market drivers

The following circumstances could move the market forward:

- 1. Clinical guidelines for RF ablation;
- 2. Reimbursement for obligatory medical insurance;
- 3. Standards of work for Chronic Pain Centers and implementation of 3-level care;
- 4. Education centers
- 5. New market players and registration of new RF products;
- 6. Expanding of Chronic Pain Centers in regions other than Moscow and Petersburg;
- 7. Leasing schemes and financial terms attractive for private hospitals;
- 8. New approach of procurement Lifecycle Contracts.

RF device used in Russia

In Russia the following models of RF ablation are used:



RFG-3CPLUS (Medtronic, USA),



Electrothermal20S SpineSystem (Smith&nephew, Britain)



Interventional spine MultiGenRF Console (Stryker, Great USA)

According to Russian experts, the effectiveness of the procedure does not depend on the generator model. However, doctors note that the latest generation models are much more convenient to use, thanks to interactive displays, the ability to create a template for the parameters of the procedure being performed, and save the data of operated patients in memory, which greatly simplifies the work of the surgeon.

Public procurement for RFA



Most public procurement was wined with Cosman product (BSC). The price varied from 1 498 460RUR to 7 986 600RUR and could depend from the region – Moscow procurement prices were higher. The average price for the device was 3 956 511RUR.

| City | Hospital T | Vendo | Yea ▼ | Price <u></u> |
|-----------------|--|---------|-------|----------------|
| Moscow | City clinical hospital named by Konchalovsky | BSC | 2018 | 2 793 600,00 ₽ |
| Kirov | Procurement of Regional MoH | BSC | 2018 | 4 387 300,00 ₽ |
| Novokuznetzk | Clinical hospital #29 | BSC | 2018 | 4 794 481,78 ₽ |
| Perm | Clinical hospital #4 | BSC | 2018 | 2 713 000,00 ₽ |
| Murmansk | Procurement of Regional MoH | BSC | 2017 | 4 041 698,04 ₽ |
| Rostov | Clinical hospital #2 | BSC | 2017 | 4 342 833,33 ₽ |
| Nizhny Novgorod | Regional clinical hospital | BSC | 2017 | 4 700 000,00 ₽ |
| Moscow | FMBA | BSC | 2016 | 4 304 790,00 ₽ |
| StPetersburg | Institute of Emergency care named by Dzhenelodze | BSC | 2016 | 4 000 000,00 ₽ |
| Moscow | Institute of Emergency healthcare | BSC | 2014 | 7 986 600,00 ₽ |
| Nizhny Tagil | City hospital #4 | BSC | 2014 | 1 498 460,00 ₽ |
| StPetersburg | RNIITO named by Vredena | BSC | 2014 | 3 149 387,50 ₽ |
| Moscow | President's Clinic #1 | Stryker | 2014 | 2 722 500,00 ₽ |
| | | | | 3 956 511,59 ₽ |

Public procurement for spare parts

| City | Hospital | V | Yea <mark>√↓</mark> | Price 💌 |
|--------------|--|-----|---------------------|----------------|
| Cheboksary | Center of traumatology and orthopedics | BSC | 2020 | 1 752 906,37 ₽ |
| Khabarovsk | Regional clinical hospital #2 | BSC | 2019 | 229 720,00 ₽ |
| Kirov | Procurement of Regional MoH | BSC | 2019 | 584 813,24 ₽ |
| Moscow | State Clinical Hospital #1 | BSC | 2019 | 1 002 970,00 ₽ |
| StPetersburg | Center of Emergency and Radiosurgey named by Nikiforov | BSC | 2019 | 2 201 400,00 ₽ |
| Kirov | Procurement of Regional MoH | BSC | 2018 | 1 208 331,00 ₽ |
| Perm | Clinical hospital #4 | BSC | 2018 | 799 308,00₽ |
| StPetersburg | Center of Emergency and Radiosurgey named by Nikiforov | BSC | 2018 | 975 750,00₽ |
| StPetersburg | Center of Emergency and Radiosurgey named by Nikiforov | BSC | 2018 | 252 374,60 ₽ |
| Kirov | Procurement of Regional MoH | BSC | 2017 | 297 000,00 ₽ |
| Rostov | Clinical hospital #2 | BSC | 2017 | 756 600,00₽ |
| StPetersburg | Pulmonology Institute | BSC | 2017 | 511 671,00 ₽ |
| StPetersburg | Center of Emergency and Radiosurgey named by Nikiforov | BSC | 2017 | 141 033,60 ₽ |
| Ufa | Clinical hospital named by Kuvatov | BSC | 2017 | 5 574 194,00 ₽ |
| Khabarovsk | Regional clinical hospital #2 | BSC | 2016 | 497 999,33₽ |
| Moscow | Scientific center of neurology | n/a | 2016 | 644 943,75 ₽ |
| StPetersburg | Center of Emergency and Radiosurgey named by Nikiforov | BSC | 2016 | 56 300,00₽ |
| Moscow | Sechenov Academy | BSC | 2014 | 524 777,00₽ |



List of users and customers

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