

Exploring the leap from innovation to commercialisation

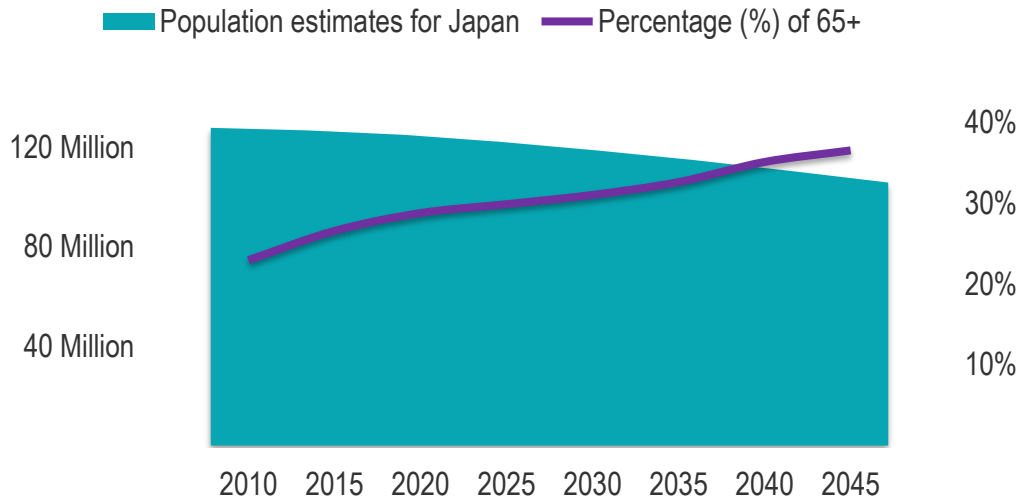


UNPRECEDENTED
SOCIETAL AND
TECHNOLOGICAL
CHANGE IN OUR
LIFETIMES



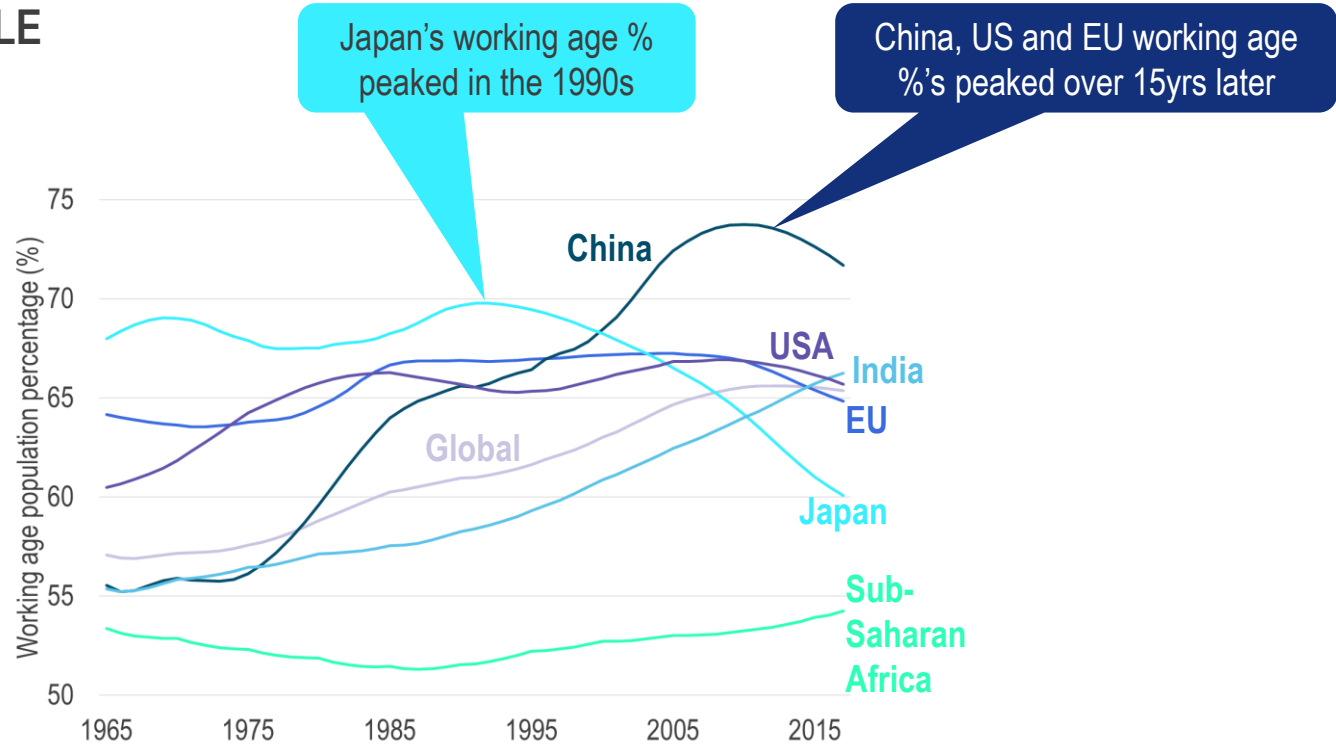
HOWEVER, OUR GLOBAL HEALTHCARE SYSTEMS HAVE NOT KEPT UP

- Global life expectancy expected to climb to 74.4 in 2022
- The number of Japanese aged 65yrs or over has increased 4x over 40 years with rural areas particularly bearing this burden
- The shortage of global healthcare professionals estimated by WHO is 4.3 million, and growing
- A shortage of 122,000 physicians is predicted in the USA by 2032



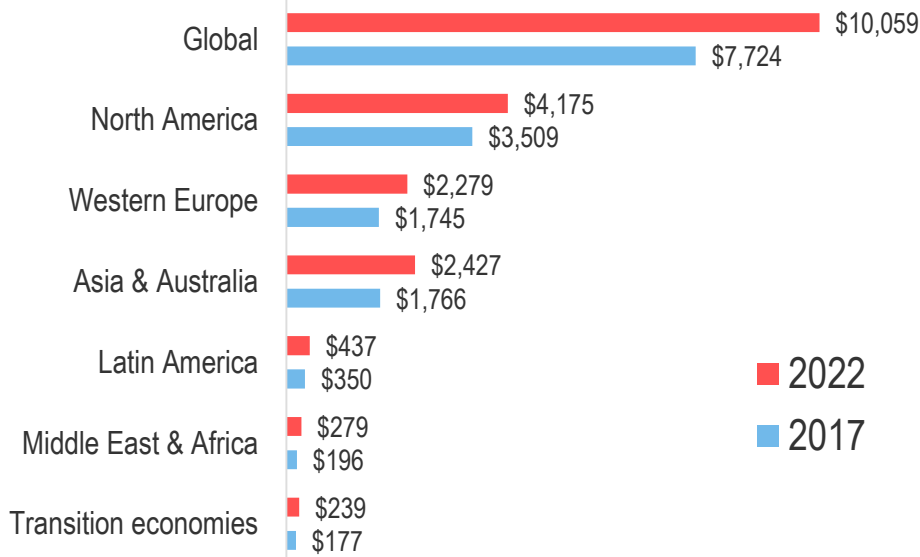
Source: National Institute of Population and Social Security Research

JAPAN HAS VALUABLE LESSONS TO SHARE



HEALTHCARE SPENDING IS INCREASING, BUT IS MONEY ALONE THE SOLUTION?

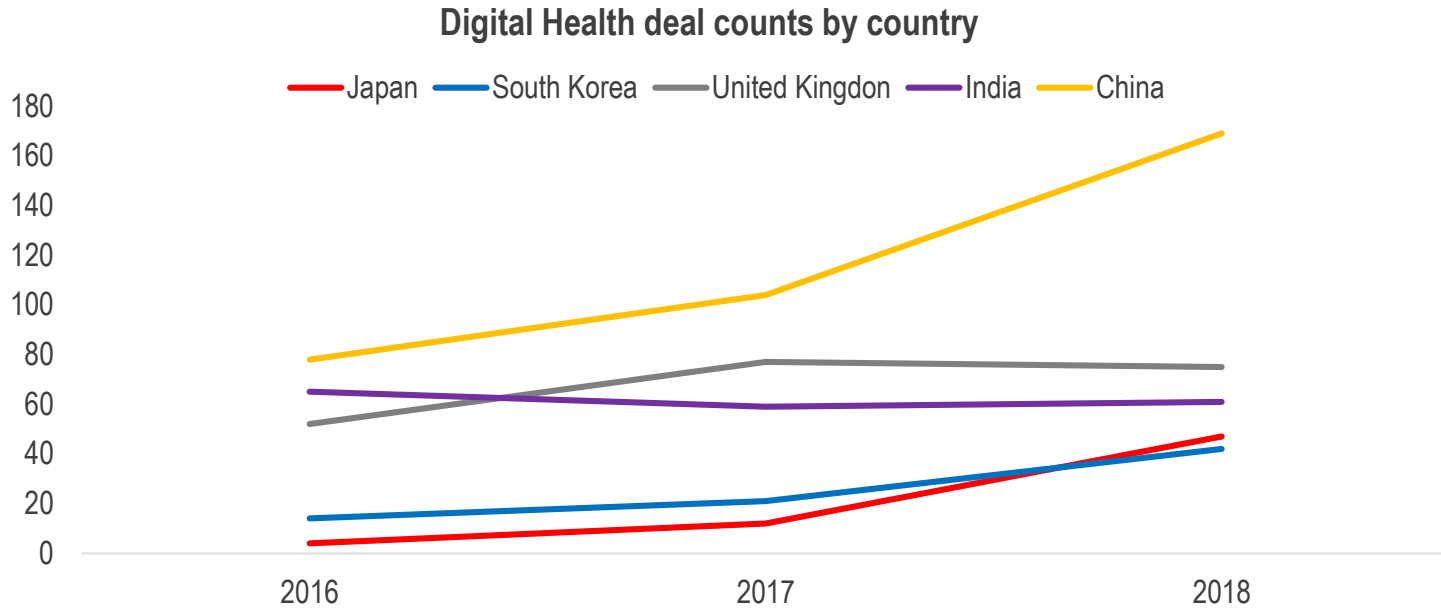
Health care spending (USD billion) 2017 & 2022



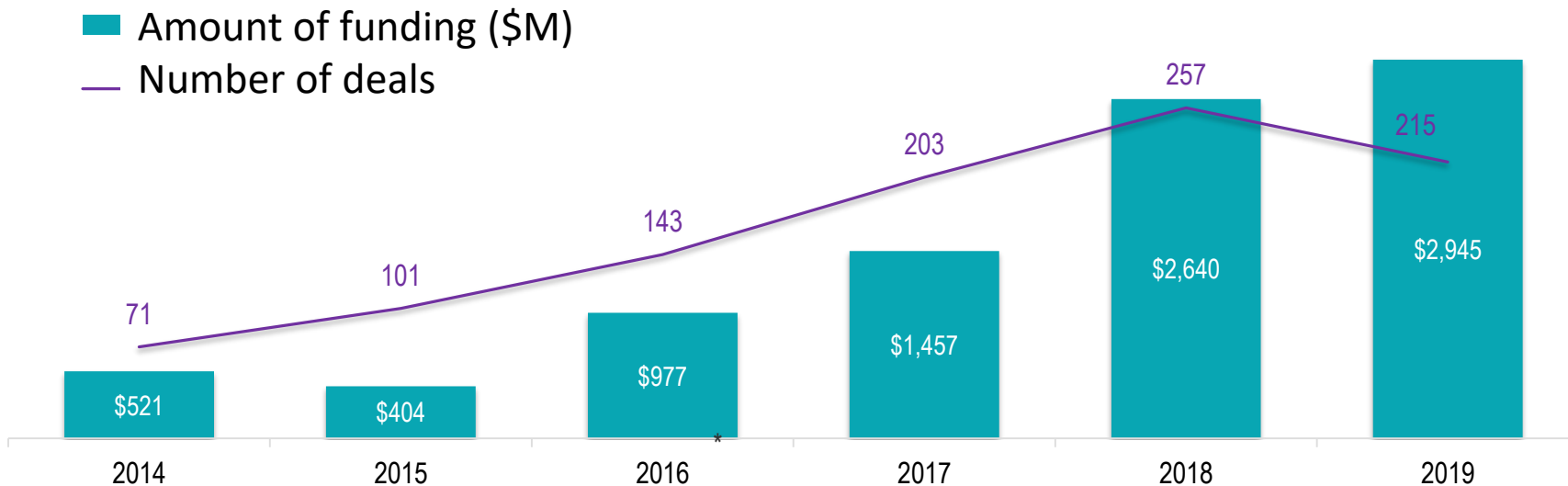
Spending is projected to increase at an annual rate of 5.4% in 2017-2022, from USD \$7.7 Trillion to USD \$10 Trillion

Source: The Economic Intelligence Unit, Data Tool accessed on 16 August 2018

THE WORLD IS INCREASING ITS INVESTMENT IN DIGITAL HEALTH



GLOBAL FUNDING FOR ARTIFICIAL INTELLIGENCE IS RISING ANNUALLY



Source: CB Insight (*data as of September 2019)

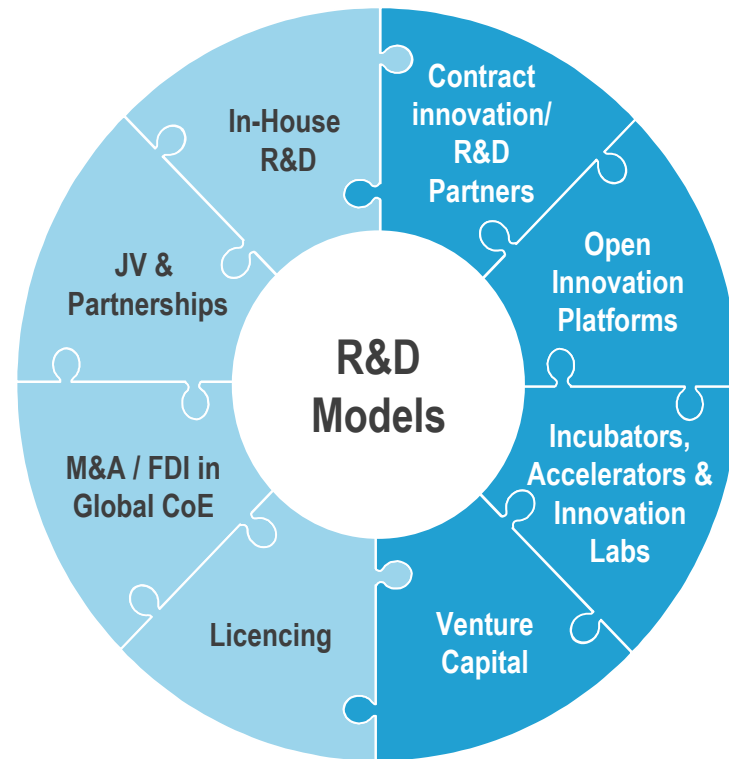
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***Technology alone won't save healthcare...
...but it will re-define it***

Othman Laraki for Forbes

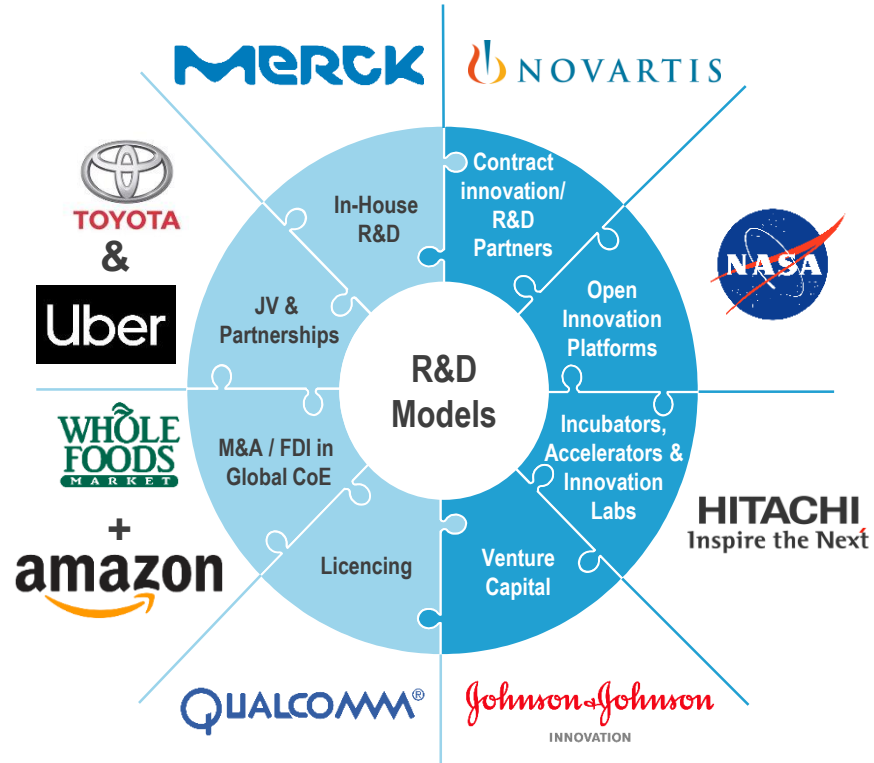
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THE MOST SUCCESSFUL AND INNOVATIVE COMPANIES ARE USING ALTERNATIVE R&D MODELS TO ACCELERATE THEIR RESPONSE




Traditional R&D Models

New R&D Models



QUESTIONS TO CONSIDER TODAY



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How can Japanese medtech companies best respond to the global market?
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What factors will drive a successful medtech ecosystem in Japan?
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What technical innovations will be key to unlocking new opportunities in healthcare?