

# An outlook on Turkey



## Facts and figures

Capital:	Ankara
Population:	73 milioni (2009)
Average age:	28,8 (2009)
Main urban centres (population, million):	Istanbul (12.6), Ankara (4.5), Izmir (3.8), Bursa (2.5), Adana (2)
GDP, current prices:	US\$618 billion (2009)
GDP, per capita:	US\$8,590 (2009)
Exports:	US\$102 billion (2009)
Imports:	US\$141 billion (2009)
Foreign Direct Investment:	US\$7.9 billion (2009)
Inflation rate (consumer prices index):	6.5 % (2009)
Main export destinations:	Germany (9,6 %); France (6,1 %); United Kingdom (5,8 %); Italy (5,8 %); Iraq (5 % (2009)
Main import sources:	Russia (14 %); Germany (10 %); China (9 %); USA (6,1 %); Italy (5,4 %) (2009) UE customs, Albania, Bosnia and Herzegovina, Croatia, EFTA (Switzerland, Norway, Iceland and Liechtenstein), Egypt, Georgia, Israel, Macedonia, Morocco, Palestine, Tunisia, Syria, Montenegro
Free Trade Agreements:	
Airports:	45 (16 international)

Source: Statistical Yearbook «Kazakhstan in 2009»

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Before the global recession, Turkey had registered sustained growth for the last 6 years, and even though the slowdown in external trade influenced negatively the economy causing a 4.7% contraction in 2009, already in the last part of the year signals of recovery were shown, which enabled OECD, World Bank and the IMF to make positive predictions for 2010, forecasting a GDP growth rate ranging from 6.2% to 6.8%.

OECD also predicts average annual growth rate of 6.7% between 2011 and 2017.

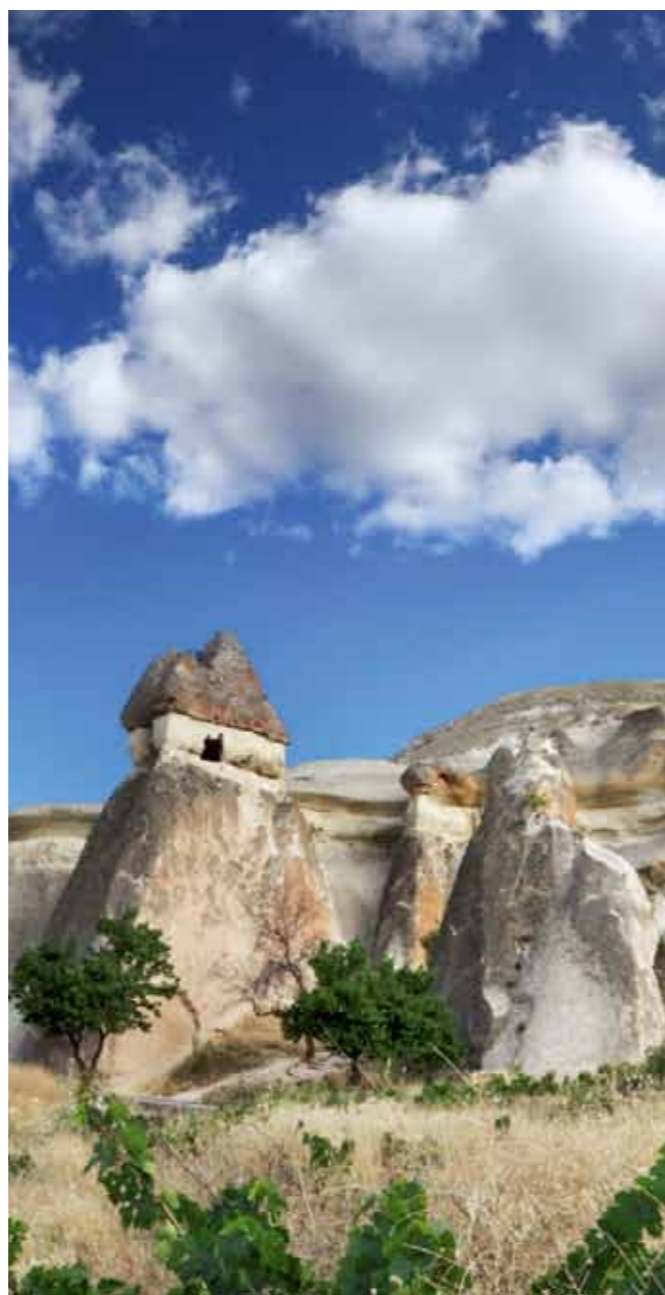
The Turkish government has been implementing a series of reforms of the healthcare sector since 2003, as part of the "Health Transformation Programme" that should be concluded in 2013, aiming at improving quality and efficiency of the country's healthcare system as well as the availability and accessibility of healthcare services. Looking to a future accession to the EU, improvement of Turkish health indices and standards of care is an essential point to be achieved by the government.

The Ministry of Health is the main provider of healthcare services, coordinating health policies and services at the national level while provincial health directorates administer healthcare locally. The Social Security Institution, which gathered three former social security organizations, the Ministry of Defence, universities and private health professionals are the other main healthcare providers.

Public health insurance formerly provided from the Social Insurance Organization (financed through mandatory contributions from employers and employees), the Civil Service Retirement Fund, the Free Enterprise Scheme (for independent traders and self-employed) and the Green Card, ensuring healthcare benefits for Turkish citizens with monthly income of less than one third of the minimum wage, who do not have the means to pay for services and treatment, was unified in 2006 under the Social Security Institution.

Population left out of public coverage include people employed in the agricultural sector, privately insured or unemployed. Private health insurance covers about 2% of the population but they do not exempt from paying premiums to social insurance funds. The public sector is dominant in the Turkish health system, but especially in urban areas there is a growing number of patients seeking treatment in private hospitals, clinics or by private practitioners.

According to the "Turkish Healthcare Industry Report" published by the Investment Support and Promotion Agency, the number of hospitals in Turkey is expected to rise from current 1,350, 72.5% of which is public, to 1,418 in 2013. The 2.7 beds per 1,000 persons rate is estimated to remain constant through the next few years, as well as the number of doctors per 1,000 persons (1.7), but as regards bed capacity, the share of the private sector is expected to increase.



Although many progresses were made in the last years, healthcare expenditure in Turkey is low, about one-fifth of average spending in OECD countries, accounting for 6.2% of total GDP after having remained under 6% between 2004 and 2007. In 2009, health spending was estimated at US\$38 billion with public share accounting for 71.6% of the total. Forecast for 2010 place healthcare spending at US\$44 billion, an estimated 6.3% of GDP.

However, as reported in "The Health Economics in the World and Turkey 2008" by Deloitte, the World Bank estimates an annual average growth of 15% in Turkish expenditure on health, which is forecasted to reach US\$63 billion by 2014, driven by policies aimed at expanding access to health services to all groups of population such as the Green Card and the shift towards a Universal Health Insurance. Moreover, although Turkish population is young, the percentage of over 65 is expected to double in the next 25 years, which is also going to impact on healthcare spending and health services demand.

As for per capita healthcare spending, in 2009 Turkey ranked 35th among sixty countries and 3rd among major emerging markets, including South Korea, Brazil, Russia, Mexico, China and India, but spending level is estimated to have increased from US\$15 in 2009 to US\$29 in 2010, and it is expected to grow further in Turkey as well as it happens in other developing countries like China and India, following the general increase in personal incomes and life expectancy.

The medical devices market in Turkey is ranked among the top 30 markets in the world, with an estimated value of US\$1.3 billion in 2008 and US\$1.1 billion in 2009 (2.2% of total healthcare expenditure), registering over 21% year-on-year decrease. Forecasts for 2010 are yet positive, with estimated US\$2.1 billion, fueled by government investment in the 2003-13 Health Transformation Programme, to reach US\$3.12 billion in 2015. Among the positive trends observed for the medical market, there is a favourable legislation for R&D investment, a growth in foreign investments in healthcare (GE Healthcare and Siemens for instance) and a process of harmonization of market regulations to align them with EU rules, but there are also challenges concerning budgetary deficits in the health system and the impact of price controls and reimbursement lists on the market potential.

The modernization process and the expansion of the private sector, as well as the expected increasing trade with EU countries are factors to be considered when thinking of Turkey as an export destination for medical and dental equipment and supplies. The presence of a large number of domestic manufacturers is not mirrored by an equal volume of local production, as it is mainly focused on low-technology products, while about 85% of medical equipment is imported. The USA account for about 30% of the import market, followed by Germany with about 20%. Germany is also the main supplier of dental equipment and products to the Turkish market. Other suppliers are China, Japan and Italy. Turkey is an exporter of dental products, which accounted for 14.2% of total medical exports in 2008, mainly directed towards Germany, France, Azerbaijan, Italy and Iraq.

Healthcare figures, year 2008

	Number of hospitals	Hospital beds
Ministry of Health	847	119,310
University	57	29,912
Private	400	20,938
Other	46	17,905

Source: Health Statistics Yearbook 2008

Dental figures, year 2008

Dental hospitals	2
Oral and dental health centres	123
State hospital dental treatment and prosthesis centres	77
Dental outpatient clinics	622
Dental units	4,294
Population per dental unit	16,655
Dentists	19,959
Ministry of Health	5,425
University	577
Private	13,957
Number of dentists per 1,000 population	0.28
Number of dental students	6,322
Number of recently enrolled dental students	1,458
Number of visits for oral/dental healthcare services	18,794,259

Source: Health Statistics Yearbook 2008

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