Medilink UK: A National Network

BioBusiness NI
Medilink East Midlands
Medilink North West
Medilink South West
Medilink West Midlands
Medilink Yorkshire & Humber
MediWales
SEHTA

›600 members
Transforming Healthcare Industry by connecting Academics, Businesses & Clinicians

Stimulate growth

Champion industry

Facilitate collaborations
Sector Overview

Advanced Wound Management
$7bn

Traditional Wound Management
$6bn

Global Wound Care Market, by Segments, 2013

Growth Factors
- 3.4% Bioengineered Skin
- 2.9% Negative Pressure Wound Therapy
- 14.5% Antimicrobial Dressings
- 11% Hydro-colloids
- 6.5% Foam Dressings
- 7.9%

$13bn

Traditional Adhesive Bandages
26.8%

Traditional Gauze Bandages
10.5%

Non-Adherent Bandages
8.3%

Film Dressings
3.5%

1MedMarket Diligence Oct 2013
Global Advanced Wound Management Market $7.0 bn in 2013 growing at +4%\(^1\)

Advanced Wound Management Includes Advanced Wound Care, Advanced Wound Devices and Advanced Bioactives\(^1\)

Definitions of products that fall within this market vary between reports and countries hence some companies may not be represented on this chart.

\(^1\)Smith & Nephew Annual Report 2013
Why should we care...

The answer...

34.5 million reasons

- **Diabetic ulcers**: >13.5 million diabetic ulcers worldwide (increasing by 9.3% annually)
- **Venous ulcers**: >12.5 million venous ulcers worldwide (increasing by >6.7% annually)
- **Pressure ulcers**: >8.5 million pressure ulcers worldwide (increasing by >6.9% annually)
The Shift in Wound Therapies?

- **1970’s**: Traditional dressings (Gauzes)
- **1980’s**: Moist wound care
- **1990’s**: Standard advanced wound care
- **2000’s**: Interactive therapies

**Efficacy**

**PASSIVE**

**PHYSICAL**

- Amds

**ACTIVE**

- Growth factors
- Interactive Biopolymers
- GF/Device combinations
- Pharmaceuticals
- Tissue Engineering
Majority of products still passive and physical dressings

The Shift in Wound Therapies?

1970’s 1980’s 1990’s 2000’s

Efficacy

PASSIVE

PHYSICAL

Gauzes

Standard advanced wound care dressings Moist wound care

AMs

Growth factors Interactive Biopolymers GF/Device combinations Pharmaceuticals Tissue Engineering

Interactive therapies
Active dressings: difficult to get traction due to development costs and delivery of strong clinical evidence.

The Shift in Wound Therapies?

- Passive:
  - Gauzes
  - Traditional dressings

- Physical:
  - Moist wound care
  - Care dressings
  - Standard advanced wound care

- Active:
  - AMs
  - Interactive therapies
  - Growth factors
  - Interactive Biopolymers
  - GF/Device combinations
  - Pharmaceuticals
  - Tissue Engineering

Timeline:
- 1970’s
- 1980’s
- 1990’s
- 2000’s
Next generation active products require strong scientific and clinical evidence.
Over 500,000 people annually suffer from chronic wounds in the UK

- Significant cost burden on health service
- Significant social problem
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• **The numbers will most likely get worse**
  – Ageing population
  – Growing incidence of diseases such as Diabetes, Obesity etc.
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• **Despite this no medical speciality exists**
  – Very little formal training in wound care
  – Wounds cared for by a wide variety of medical professionals – no woundologist
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• **Complicated care pathway**
  – Lack of clinical and scientific evidence relating to wounds and their biology.
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Third highest cost in NHS behind heart disease and cancer
Wounds in the major disease and condition categories:

- Diabetes (64,000)
- Venous diseases (70-100,000)
- Malignancies (2700)
- Inherited conditions such as Epidermolysis bullosa (fragile skin) (5,000)
- Wounds across the age groups from neonates to the frail elderly (20,000 pressure ulcers)

Up to 500K people annually suffer from chronic wounds and numbers growing
Complicated care pathway with co-morbidities
3rd highest cost to NHS behind cancer and heart disease
33% wounds unhealed after 6 months and 20% after 1 year
£4700 for each wound on average
Healthcare Technology Cooperatives (HTCs)

Aims:

- Focus on *clinical areas and/or themes of high morbidity* which will improve the quality of life of NHS patients and improving the effectiveness of healthcare services that support them

- Act as a *catalyst for NHS “pull”* for the development of new medical devices, healthcare technologies and technology-dependent interventions

- *Work collaboratively* with patients and patient groups, charities, industry and academics
Wound Prevention & Treatment – Health Technology Cooperative (WoundTec)

Hosted by Bradford Teaching Hospitals NHS Foundation Trust, this HTC is a Strategic partnership between:
Role of HTC Strategic Partners:

**Kings**: Clinical data capture, identification of unmet needs, co-design novel medical devices with users and manufacturers, proof of concept testing.

**Southampton**: Sensor development, device and support system assessment, end-user evaluation.

**Leeds**: Evidence review and clinical trial design and evaluation.

**Birmingham**: Acute and chronic wound management, clinical trial and care evaluation, horizon scanning.

**Bradford**: Laboratory and cellular research understanding biological action of device.

**Industry Link**: patient focus and clinical trial delivery, clinical care and education.
The WoundTec HTC Aim

Target device development to address unmet need to:

- Work with patients, carers and HCPs to identify areas of need
- Improve wound prevention and reduce wound recurrence, decreasing the treatment burden while generating improved outcomes
- Reduce hospital-based treatments while delivering clinical and cost effective care in the community
- Reduce cost burden of treating long term wounds by improving healing rates and empowering patients to self-manage their wound effectively
- Generate wealth by supporting UK industry and releasing NHS resources
What can the UK offer?

- Strong industrial presence
- Skill and scientific base – large medical device sector
- Key opinion leaders
- Centres of excellence
- Capacity and motivation in academia, national research facilities and clinical centres
- Access to UK and European funding for innovation and access to the NHS

Barrier

- Lack of international collaboration to drive development
Thank you

Costa Philippou
costa@medilinkem.com
+44 (0)7852 723475