



# The Healthcare Sector in Romania 2021

A DEMO Sector Overview  
by FRD Center





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Since 2000, FRD Center offers upon demand new suppliers identification and selection services, market research and intelligence, B2B matchmaking and M&A consulting services to foreign companies and organisations interested to enter Romania and the emerging markets in Europe as manufacturers, exporters, consultants, investors or joint-ventures, to relocate their operations, or to source in CE, SE and Eastern Europe.

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**As part of the CSR activity, FRD Center endorses the**

**Sibiu International Theatre Festival FITS (SibFest) - [www.sibfest.ro](http://www.sibfest.ro)**

**The Sibiu International Theatre Festival is the most complex festival in Romania.**

**Internationally, it is recognised as one of the most important performing arts festivals in Europe, alongside Edinburgh International Festival (Great Britain) and Avignon Festival (France).**







## In this Sector Overview



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*This is a DEMO market analysis. For market entry according to your specific needs, contact the FRD Center team at [europa@frdcenter.ro](mailto:europa@frdcenter.ro)*

# About FRD Center - Factor Regional Development Center



*One of the pioneer privately owned independent market entry consulting firms in Emerging Europe*

*Covers markets such as Romania, Bulgaria, Poland, Hungary, Czechia, Serbia, Lithuania, Turkey etc.*

*For over 20 years, provides assistance to:*

- Foreign companies, SMEs, corporations*
- Foreign export promotion agencies, international trade organisations, global consulting groups, chambers of commerce, commercial sections of embassies*

FRD Center is an Enterprise Ireland trade consultant, an accredited Expert Consultant with: [Switzerland Global Enterprise Expert Network](#), [Business Finland Consultants Network](#), [Sweden on the Go Consultants Network](#), Red de promocion exterior, Instituto de Fomento Region de Murcia and an EU commission approved partner of “[EU GATEWAY | BUSINESS AVENUES](#)”

## *Services include:*

- Multi-country market research
- Local business partners search and selection
- Players identification and detailed profiles
- Comparative analysis
- Data collection, interviews with KOLs
- B2B, Trade mission - physical, virtual



# 1. Current and expected evolution of the Romanian economy

Romania is the 2nd largest market in Central Eastern Europe after Poland and one of the most dynamic economies in the EU.

For 2021, the revised economic growth forecast is of 6.7% from 4.2% after strong positive dynamics in Q4 2020 and Q1 2021. Romania is already officialy out of the COVID19 recession.

The Romanian government is committed to implement a set of ambitious reforms. These as part of the agreement with the EC and will be financially covered also by the EU Recovery and Resilience Plan.





**FRD Center is monitoring the market opportunities in Romania and other markets in CE Europe, Eastern Europe and SE Europe.**

**Upon demand, FRD Center identifies and selects the local players according to the Client's criteria, provides In-Depth Analysis and Target Origination services.**

**For over 20 years, FRD Center facilitates commercial relations between foreign manufacturers, investors, exporters with local key decision makers and provides B2B matchmaking at Decision Maker level, Market Research etc.**

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***with your specific demand for local support***

## 2. The Romanian market of hospital equipment and med-tech

The Romanian market of hospital equipment and med-tech is reliant on imports due to the absence of local large manufacturers.

Considering the new investments, up-grading and modernisations of public hospitals announced in Romania to take place for the next 6-7 years, as well as the further expansion of the private healthcare networks, it is expected that the Romanian market of hospital equipment and med-tech to register a considerable growth of 5-6% every year till 2027.

Major players on the market include: Philips, GE Healthcare, Medtronic, Oxoid, Varian, Johnson & Johnson, Beckman Coulter, Olympus, Greiner, Nihon Kohden, Becton Dickinson, Bioomerieux, Trinity Biotech.





### 3. Announced investments in the Romanian public healthcare system

In 2020, there were 535 hospitals operating in Romania.

The Romanian public healthcare system is currently receiving considerable attention from international investors, such as the European Bank for Reconstruction and Development, the European Investment Bank and the World Bank.

Also, funding is available from EU programs and the recently launched National Recovery and Resilience Facility.

Total allocated sum for the period 2021 - 2027 is of approx 4 bnEUR

As committed in the National Recovery and Resilience Plan, in 2021 will come into being the National Agency for Development of Health Infrastructure.

The Agency will be a separate legal entity, subordinated to the MoH.

Its portfolio will include infrastructure projects of national and regional importance, starting with the regional hospitals.

ANDIS will benefit in the first three years (2021-2023) from EIB's technical assistance though the PASSA mechanism, employing EU funds.

### 3. Announced investments in the Romanian public healthcare system - new hospitals

Brasov Regional Hospital	800-1000 beds	500 mEUR	EU Funds and/or EBRD/EIB
Iasi Regional Emergency Hospital	800-1000 beds	500 mEUR	EU Funds +EIB
Cluj Regional Emergency Hospital	800-1000 beds	500 mEUR	EU Funds +EIB
Craiova Regional Emergency Hospital	800-1000 beds	500 mEUR	EU Funds +EIB
Sibiu Regional Emergency Hospital	800-1000 beds	500 mEUR	National Recovery and Resilience Facility (RRF) + EIB/EBRD
New facility for pneumology and infections diseases for the Oradea Emergency County Hospital	under 800 beds	130 mEUR	National Recovery and Resilience Facility (RRF)
Timisoara General Hospital	under 800 beds	approx 400 mEUR	Potentially European Funds + EIB/EBRD

Source: FRD Center, Ministry of Health



**Are you interested to learn more about the up-coming tenders and stages of the new hospital projects in Romania?**

**Who are the main stakeholders and decision makers?**

**How to reach the relevant local partners - designers, equipment importers - and how to participate in local public procurement tenders?**

**FRD Center is monitoring the healthcare investments in Romania. Upon demand can generate information and introductions based on the Client's requirements.**

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## 4. Examples of local importer-distributors of hospital equipment

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To successfully enter the Romanian market, a foreign manufacturer of hospital equipment and medical devices is advised to

select a local experienced importer-distributor with good contacts in the market who is experienced in Public Procurement and regularly participates in local tenders

For over 20 years, FRD Center assists foreign manufacturers and exporters identify and select local business partners, experienced importer-distributors of hospital equipment such as



**RAFI MEDICAL®**  
*Echipamente pentru viață*



**ThreePharm**



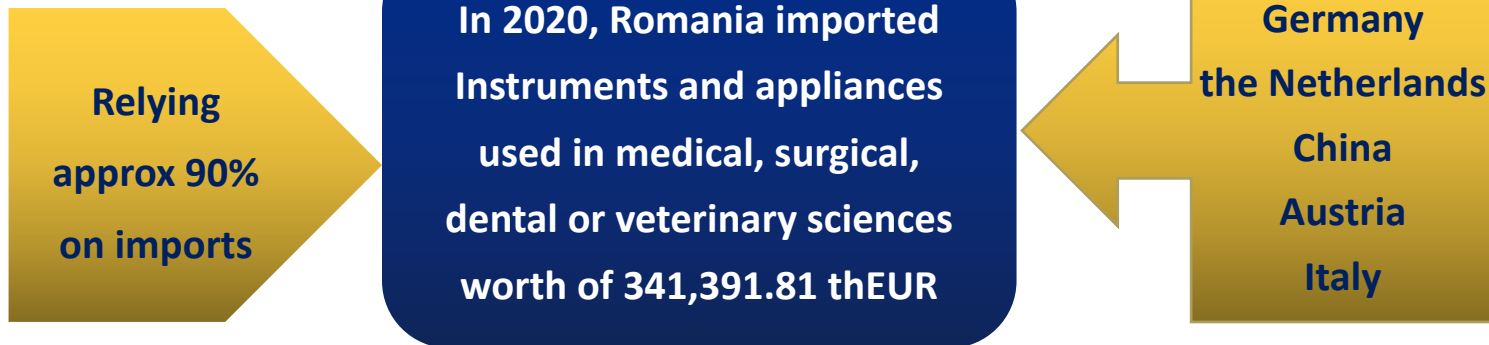
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## 4. Examples of local importer-distributors of hospital equipment

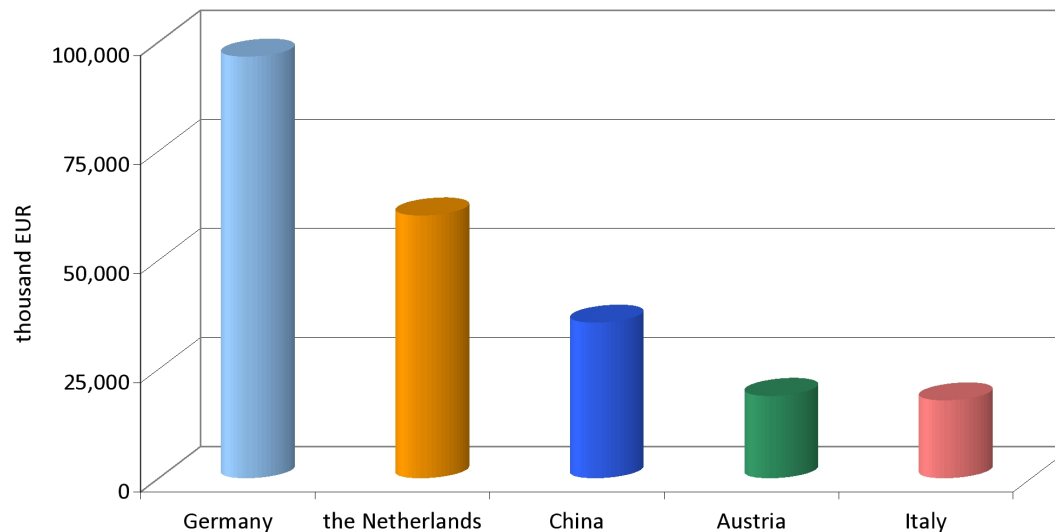
Name & website	Hospital clients	TO mEUR 2020	TO 2019 vs. 2018 in EUR %	TO 2020 vs. 2019 in EUR %
Three Pharm <a href="https://www.threepharm.ro/">https://www.threepharm.ro/</a>	Iasi Regional Institute of Oncology Emergency Institute for Cardiovascular and Transplant Diseases in Targu Mures Clinical Hospital of Obstetrics-Gynecology "Dr. I.A. Sbarcea" in Brasov	11.1	50.7	-7.8
Rafi Medical <a href="https://www.rafi.ro/">https://www.rafi.ro/</a>	Bucharest Emergency University Hospital Oradea County Hospital Falticeni Municipal Hospital Focsani County Hospital Braila County Hospital Iasi Regional Institute of Oncology	8.0	186.6	14.9
DTL Medical <a href="https://www.dtlmedical.ro/">https://www.dtlmedical.ro/</a>	Valcea County Emergency Hospital	4.6	25.6	-38.8
Editronic International <a href="http://www.editronic.ro/">http://www.editronic.ro/</a>	Moinesti Emergency City Hospital Ploiesti County Emergency Hospital Sibiu County Emergency Hospital Caransebes Municipal Emergency Hospital	3.1	11.9	-44.5
Adion Prodimpextrans <a href="https://www.adion.ro/">https://www.adion.ro/</a>	Beclean City Hospital	3.0	8.4	93.4
Cortech Med <a href="http://www.cortech.ro/">http://www.cortech.ro/</a>	Sf. Ioan Clinical Emergency Hospital in Bucharest Craiova County Emergency Hospital	2.8	688.5	-71.0
Medfarm Trading <a href="https://www.medfarm-trading.ro/">https://www.medfarm-trading.ro/</a>	Moinesti Emergency City Hospital Craiova Clinical Hospital of Neuropsychiatry	1.6	8.0	13.6

Source: FRD Center, Ministry of Finance

## 5. Analysis of the hospital equipment imports in Romania



Imports of medical, surgical, dental or veterinary instruments and appliances in Romania - top 5 origin countries in 2020



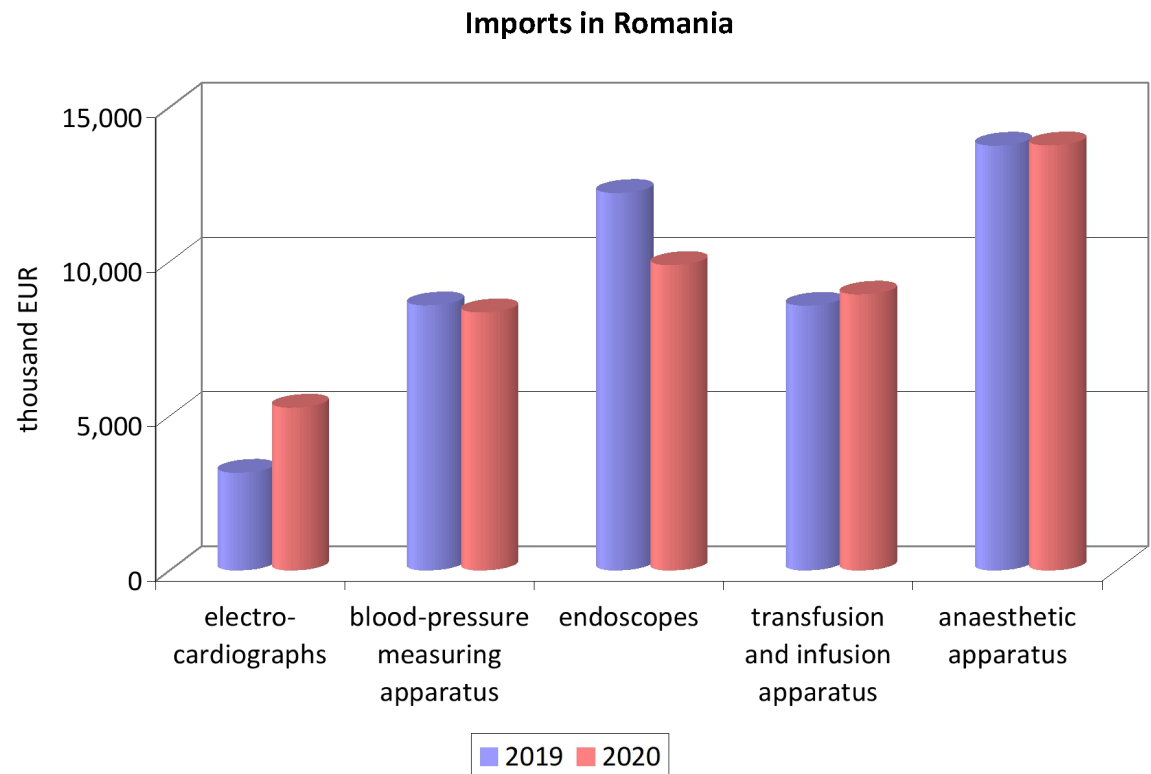
Source: FRD Center, Eurostat



## 5. Analysis of the hospital equipment imports in Romania

FRD Center monitors  
the dynamics of the  
Romanian imports of  
hospital equipments

2020 vs 2019

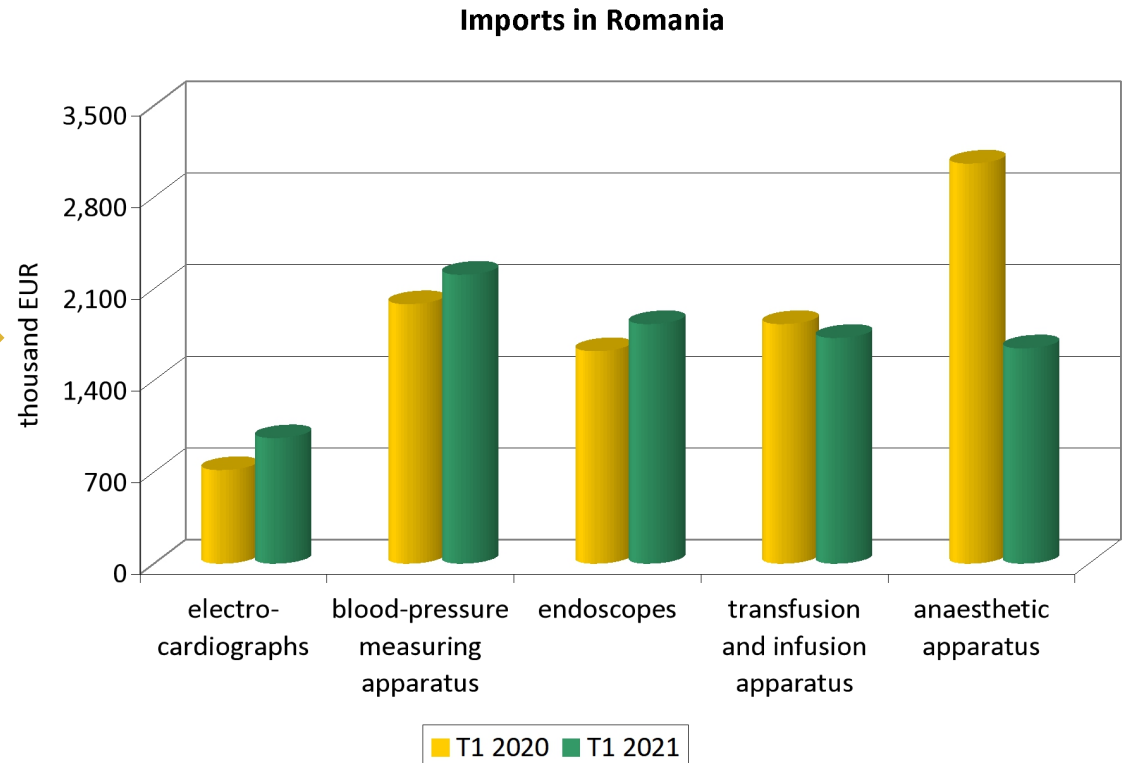


Source: FRD Center, Eurostat

## 5. Analysis of the hospital equipment imports in Romania

FRD Center monitors  
the dynamics of the  
Romanian imports of  
hospital equipments

T1 2020 vs T1 2021



Source: FRD Center, Eurostat



**Are you interested to study the medical sector in Romania? To identify the upcoming opportunities in the new hospital projects in Romania?**

**Are you interested to identify the main stakeholders and decision makers?**

**To analyse the local players?**

**Upon demand from Clients, FRD Center researches and analyses the market, generates sector studies according to on the Client's requirements.**

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## 6. Analysis of the procurement procedures in the Romanian public healthcare

Except for especially regulated cases, all Public Purchasing procedures are transparent and are conducted throughout the public procurement portal (SEAP), mostly via electronic means communications. However, for a foreigner to register into SEAP can be rather cumbersome.

The Romanian public procurement system is extensively regulated and subject to constant scrutiny, both from the private sector and public actors; Therefore, the risks and challenges we see are mostly related to establishing an efficient and qualified bid department, able to swiftly identify new opportunities and manage on going processes

Potential risks might arise from insufficient or un-qualified personnel managing the public procurement process, leading to publication of incorrect award documentations and vitiated evaluation procedures.

Such risks could be mitigated by using the remedies system (appeals), which is well established and efficient. Hiring specialised technical and legal consultants should be considered.

Law no. 98/2016 on public procurement - regulates the general legal framework applicable to public procurement procedures

## 7. Examples of potential partners in the Romanian healthcare market

<b>Design and Architecture</b>	<b>Hospital refurbishment</b>	<b>Procurement and legal</b>
DICO si TIGANAS Birou de Proiectare	IMSAT (Groupe SNEF)	Popovici Nițu Stoica & Asociații
Tesseract Architecture	Construct Mapcom	Voicu Filipescu
Prographic Architecture Studio	HIDRO SALT B92	Wolf Theiss Romania
DD Design Studio	Uicon	Vass & Asociatii
Head Made Architecture	Athenaeum Construct	LC Advertising & PR

## FRD Center

Market entry services to Romania, the CEE and SEE.  
Market research, B2B matchmaking, sector studies,  
trade missions, investment opportunity research, M&A support,  
new supplier identification and selection.

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*For over 20 years, FRD Center has been assisting international companies with overseas expansion, market research, introduction to selected local players and decision makers, targets origination and market entry to the Emerging Markets in Eastern Europe, CE and SE Europe.*

Are you a foreign company looking to expand, acquire local players, build strategic partnerships or to find new Clients in Eastern Europe?

*As one of the pioneer privately owned market entry advisory firms in Romania, operating for 20 years, FRD Center has high competencies in market entry advisory and is quite well placed to assist foreign companies with a multitude of aspects related to new vendor identification & selection, market opportunity assessment, B2B matchmaking with local Decision Makers and M&A in Romania and the region.*

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*For tailored Market Research, B2B Matchmaking with local players in the sector, Target Origination and M&A assistance feel free to contact*

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