

HEALTH CARE & PHARMA

Helgi's Pocket Guide

December 2012



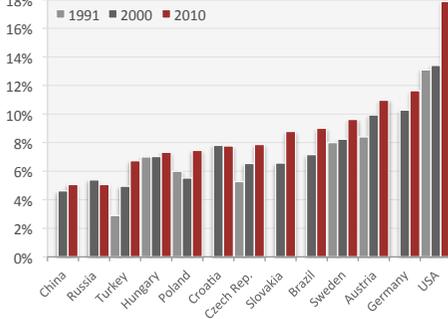
Slovakia

SLOVAK HEALTH CARE AT A GLANCE

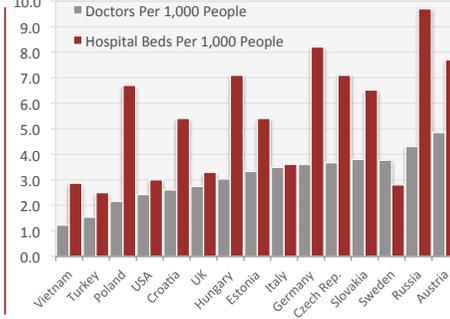
	1990	1995	2000	2005	2010
Population (mil)	5.27	5.37	5.40	5.42	5.46
Life Expectancy (Years)	71.0	72.8	73.6	74.3	75.6
Life Expectancy At 65 Years (Years)	14.3	14.6	15.0	15.5	16.3
Total Health Expenditure (As % Of GDP)	6.4%	6.6%	7.0%	8.8%	
Total Health Expenditure Per Capita (USD)	220	249	626	1,413	
Public Health Expenditure (As % Of Total)	88.5%	85.0%	72.1%	65.9%	
Neonatal Mortality (Per 1,000 Live Births)	12.30	9.20	6.90	5.70	4.40
Infant Mortality (Per 1,000 Live Births)	15.50	12.50	9.90	8.40	6.80
Hospital Beds Per 1,000 People	7.45	8.55	7.97	6.85	6.43
Physicians (Per 1,000 People)		3.28	3.79	3.55	3.80
Prevalence Of HIV, Total (As % Of Population Aged 15-49)	0.10%	0.10%	0.10%	0.10%	0.10%
Incidence Of Tuberculosis (Per 100,000 People)	32.0	34.0	22.0	15.0	8.0
Immunisation, Pol3 (As % Of One-Year-Old Children)	98.0%	98.0%	99.0%	99.0%	99.0%



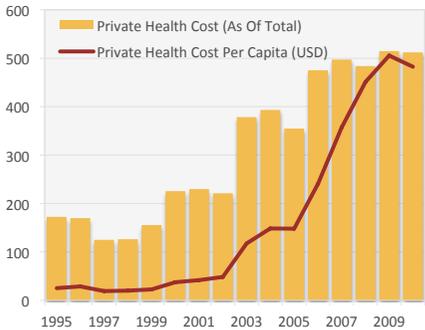
HEALTH CARE EXPENDITURES (AS OF GDP)



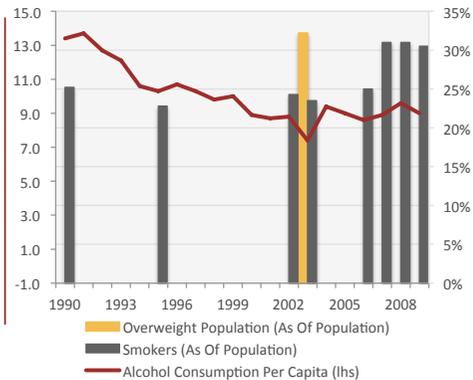
HEALTH CARE PENETRATION



PRIVATE HEALTH CARE CONTRIBUTION



LIFESTYLE (BAD HABITS)

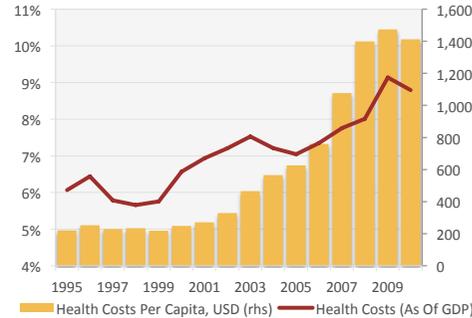


Source: World Bank, National Statistical Office, OECD, United Nations, Helgi Analytics calculation

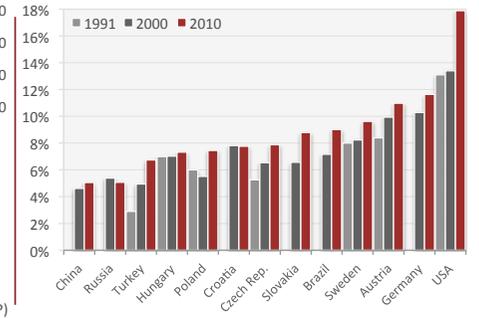


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HEALTH CARE EXPENDITURES

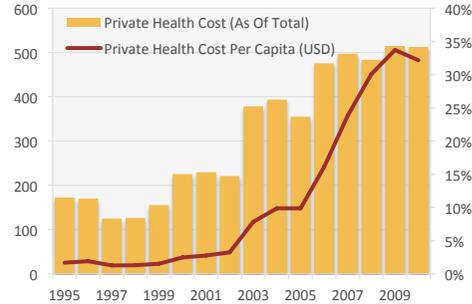


HEALTH CARE EXPENDITURES (As Of GDP)

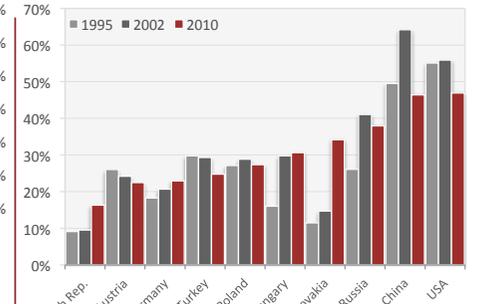


Total healthcare expenditures have risen from less than 5% in the 1990s to nearly 10% of GDP in 2010, in line with Slovakia's peers in the region. This means nearly USD 1,400 per capita in absolute terms compared to USD 5,000 in the EU15, or over USD 7,000 in the USA.

PRIVATE HEALTH CARE EXPENDITURES

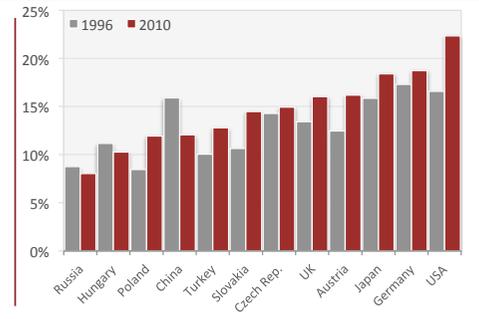
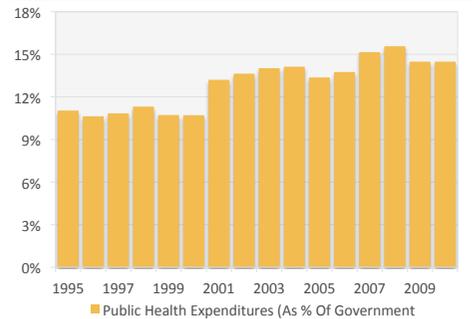


PRIVATE HEALTH CARE EXPENDITURES (As Of Total)



Following hefty reforms at the beginning of this century under Mr. Dzurinda's government, Slovakia now has one of the highest levels of private participation in healthcare costs in CEE, exceeding 30% of the total. In absolute terms it means the average Slovak pays around USD 450 a year to cover his/her costs, a third more than in the neighbouring Czech Republic.

PUBLIC HEALTH COST (As Of Government Expenditures)



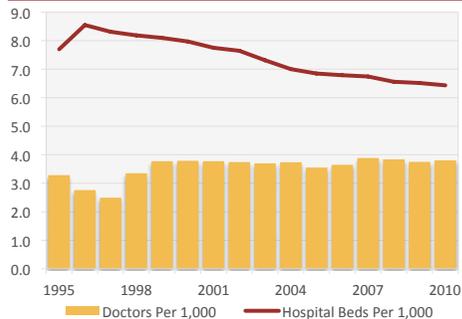
Public healthcare has cost around 13-14% of total government expenditures in the last decade. The share has nearly doubled compared to the 1990s, fuelled by strong economic growth and a hefty increase in private participation in the financing of healthcare costs.

Source: World Bank, National Statistical Office, United Nations, OECD, Helgi Analytics calculation

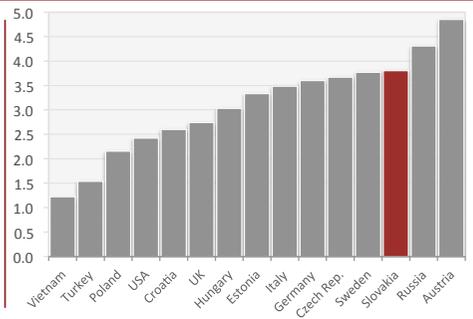


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PHYSICIANS & HOSPITAL BEDS PER 1,000 PEOPLE

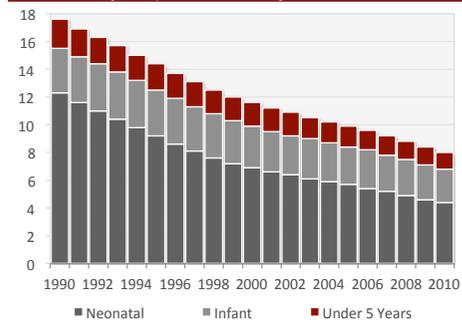


PHYSICIANS PER 1,000 PEOPLE (2010)

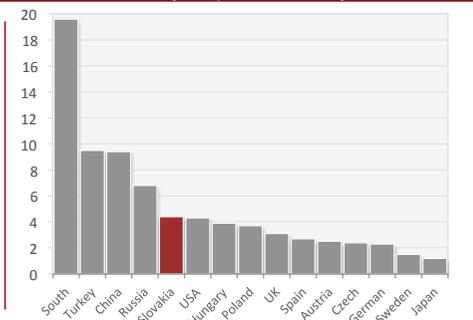


Slovaks have a relatively good healthcare service in terms of access, coverage and overall quality. Having said that, the healthcare system suffers from similar "diseases" to other post-communist countries - medical services are undervalued, the system is underfunded and doctors often underpaid, and the allocation of funds is ineffective.

MORTALITY (Per 1,000 Live Births)

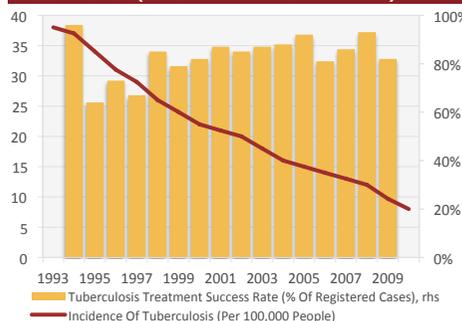


INFANT MORTALITY (Per 1,000 Live Births)

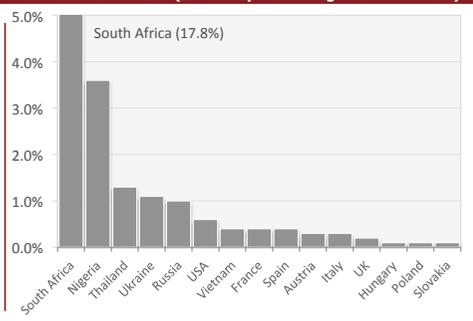


The Slovak healthcare system has made great progress in the last two decades. Neonatal mortality has been reduced by two thirds, for example, with only four lost babies for each 1,000 born.

TUBERCULOSIS (Incidence & Treatment Success)



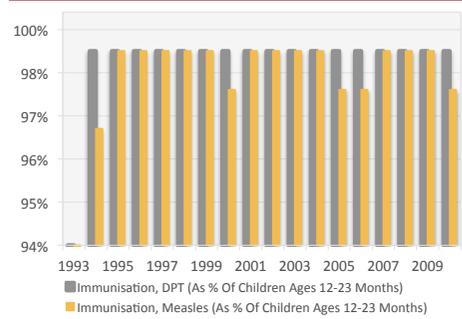
PREVALENCE OF HIV (As Of Population Aged 15-49 Years)



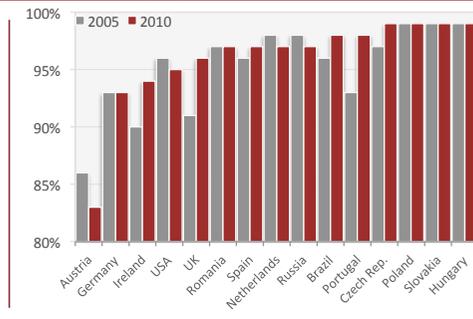
Slovakia is a relatively closed country, with outside influence being limited. "Thanks to" 40 years of communism, it is a very homogeneous society (economically and culturally, as well as from the religious point of view), with only around 1% of the people living in the country being foreigners. Together with the solid healthcare system, no wonder the country has been relatively immune to so-called 'diseases of civilisation'.

Source: World Bank, National Statistical Office, United Nations, OECD, Helgi Analytics calculation

IMMUNISATION

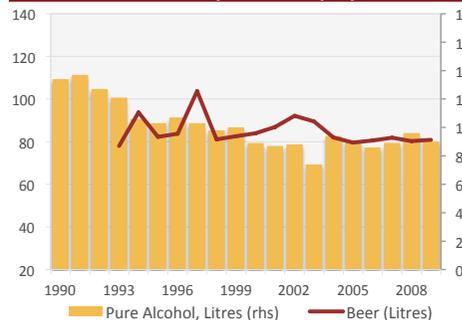


IMMUNISATION (DPT, As Of Children 12-23 Months)

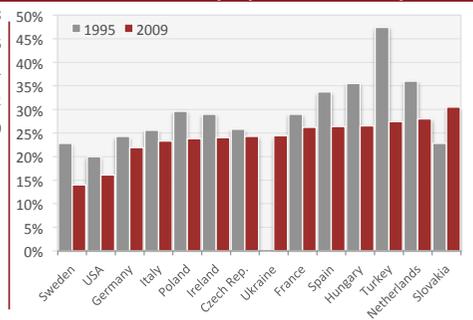


Children's vaccination is compulsory in Slovakia (and was in the whole Soviet Bloc before 1989), so no wonder the whole of Central Europe shows a very high percentage of children vaccinated for the most common diseases. The ratio often approaches 100% in most of the CEE countries and is higher than in Western Europe, where compulsory vaccination has been less strict.

ALCOHOL CONSUMPTION (Litres Per Capita)

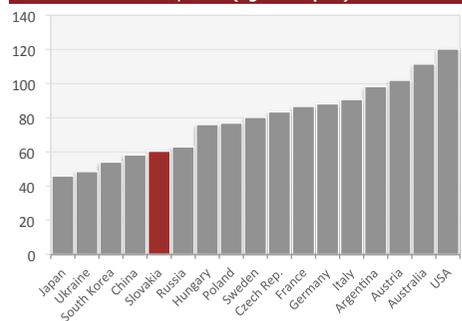


TOBACCO CONSUMPTION (Proportion Of Smokers)

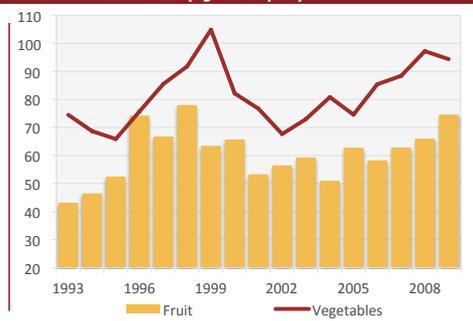


Unlike their Czech neighbours, who remain heavy alcohol consumers, Slovaks have been drinking fewer alcoholic beverages in the last two decades, in line with other Europeans. On the other hand, more of them smoke regularly than 15 years ago. According to OECD, around 30% of Slovak population were daily smokers in 2009.

MEAT CONSUMPTION, 2007 (kg Per Capita)



FRUIT & VEGETABLES (kg Per Capita)



Slovaks used to consume a lot of meat and animal fat before the collapse of the Soviet Bloc in 1989, which was considered one of the reasons for the high prevalence of cardiovascular diseases, though meat and fat have been gradually replaced by fruit and vegetables.

Source: World Bank, National Statistical Office, United Nations, OECD, Faostat, Helgi Analytics calculation

POPULATION		2003	2004	2005	2006	2007	2008	2009	2010	2011
Population	<i>mil</i>	5.41	5.41	5.42	5.42	5.43	5.44	5.45	5.46	5.47
Persons Per Household	<i>persons</i>	3.26	3.25	3.24	3.18	3.20	3.17	3.10	3.11	3.11
Share Of Population (0-14 Years Of Age)	%	18%	18%	17%	17%	16%	16%	16%	15%	15%
Share Of Population (15-64 Years Of Age)	%	70%	71%	71%	72%	72%	72%	73%	73%	73%
Share Of Population (65+ Years Of Age)	%	11.3%	11.4%	11.5%	11.6%	11.7%	11.9%	12.0%	12.1%	12.4%
Median Age	<i>years</i>	34.5	34.8	35.1	35.5	35.8	36.2	36.5	36.9	37.3
Old Age Dependency Ratio	%	16%	16%	16%	16%	16%	16%	17%	17%	17%
Youth Dependency Ratio	%	26%	25%	24%	23%	23%	22%	21%	21%	21%
Life Expectancy, both sexes	<i>years</i>	74.0	74.0	74.3	74.3	74.8	75.0	75.3	75.6	
Life Expectancy, female	<i>years</i>	77.8	77.8	77.9	78.2	78.1	78.7	78.7		
Life Expectancy, male	<i>years</i>	69.9	70.3	70.1	70.4	70.5	70.9	71.3		
Life Expectancy At 65, both sexes	<i>years</i>	15.3	15.5	15.5	15.6	15.8	16.1	16.3	16.3	
Life Expectancy At 65, female	<i>years</i>	16.9	17.1	17.1	17.3	17.5	17.8	18.0	18.0	
Life Expectancy At 65, male	<i>years</i>	13.2	13.3	13.3	13.3	13.6	13.8	14.1	14.0	

HEALTH CARE		2003	2004	2005	2006	2007	2008	2009	2010	2011
Health Expenditure, Total (Current USD)	<i>USD mil</i>	2,505	3,044	3,373	4,100	5,814	7,561	7,984	7,671	
Total Health Expenditures (As % Of GDP)	%	7.5%	7.2%	7.0%	7.3%	7.8%	8.0%	9.1%	8.8%	
Total Health Expenditures Per Capita	<i>USD</i>	466	565	626	760	1,077	1,399	1,474	1,413	
Public Health Expenditures (As % Of Total)	%	75%	74%	72%	68%	67%	68%	66%	66%	
Public Health Expenditures Per Capita	<i>USD</i>	348	417	451	520	720	948	968	930	
Private Health Expenditures (As % Of Total)	%	25.2%	26.2%	23.7%	31.7%	33.2%	32.2%	34.3%	34.1%	
Private Health Expenditures Per Capita	<i>USD</i>	117	148	148	241	357	451	506	482	
Public Health Expenditures (As Of Gov. Costs)	%	14.0%	14.1%	13.4%	13.7%	15.2%	15.6%	14.5%	14.5%	
Persons Per Doctor (Physician)	<i>persons</i>	270	268	282	274	258	261	267	263	
Number Of Hospital Beds	<i>beds</i>	39,558	37,739	37,131	36,781	36,642	35,678	35,520	35,132	
Hospital Beds Per 1,000 People	<i>beds</i>	7.3	7.0	6.9	6.8	6.7	6.6	6.5	6.4	
Total Fertility Rate (Live Births Per Woman)	<i>children</i>	1.20	1.24	1.25	1.24	1.25	1.32	1.41		
Mean Age Of Woman At Birth Of First Child	<i>years</i>	24.9	25.3	25.7	26.0	26.3	26.6	27.0	27.3	
Total Births	<i>mil</i>	0.05	0.05	0.05	0.05	0.05	0.06	0.06	0.06	
Births Attended By Health Staff (As % Of Total)	%	100%	100%	100%	100%	99%	100%	100%		
Neonatal Mortality (Per 1,000 Live Births)	<i>per '000</i>	6.10	5.90	5.70	5.40	5.20	4.90	4.60	4.40	
Infant Mortality (Per 1,000 Live Births)	<i>per '000</i>	9.00	8.70	8.40	8.20	7.80	7.50	7.10	6.80	6.50
Mortality Rate, Under 5 Years (Per 1,000 Live Births), per '000	<i>per '000</i>	10.50	10.20	9.90	9.60	9.20	8.80	8.40	8.00	
Immunisation, DPT (As % Of Children Aged 12-23 Months)	%	99%	99%	99%	99%	99%	99%	99%	99%	
Immunisation, Measles (As % Of Children Aged 12-23 Months)	%	99%	99%	98%	98%	99%	99%	99%	98%	
Immunisation, BCG (As % Of One-Year-Old Children)	%	98%	98%	98%	98%	98%	98%	97%	98%	
Immunisation, HepB3 (As % Of One-Year-Old Children)	%	99%	99%	99%	99%	99%	99%	99%	99%	
Immunisation, Pol3 (As % Of One-Year-Old Children)	%	98%	99%	99%	99%	99%	99%	99%	99%	
Prevalence Of HIV, Total (As % Of Population Aged 15-49)	%	0.10%	0.10%	0.10%	0.10%	0.10%	0.10%	0.10%		
Incidence Of Tuberculosis (Per 100,000 People)	<i>per '000</i>	18.0	16.0	15.0	14.0	13.0	12.0	9.7	8.0	
Tuberculosis Case Detection Rate (% , All Forms)	%	92%	77%	89%	88%	88%	89%	83%	88%	
Tuberculosis Treatment Success Rate (% Of Registered Cases)	%	87%	88%	92%	81%	86%	93%	82%		

HOUSEHOLD CONSUMPTION		2003	2004	2005	2006	2007	2008	2009	2010	2011
Pure Alcohol Consumption Per Capita	<i>litres</i>	7.4	9.4	9.0	8.6	8.9	9.6	9.0		
Wine Consumption Per Capita	<i>litres</i>	8.0	8.5	7.7	8.1	5.3	5.9	7.0	12.9	
Beer Consumption Per Capita	<i>litres</i>	89.5	82.0	79.6	80.6	81.9	80.3	80.9		
Cigarette Consumption Per Capita	<i>cigarettes</i>	1,165	1,165	1,310	1,292	1,418	1,471	1,413	1,374	1,353
Tobacco Consumption Per Capita	<i>grammes</i>									
Smokers As Of Population, +15 Years	%	23.5%			25.0%		31.0%	30.5%		
Smokers As Of 15-24 Year-Old-Population	%	24%						16%		
Overweight Population As Of Total	%	32%								
Meat Consumption Per Capita	<i>kg</i>	64.1	61.4	64.5	60.9	58.8	60.0	60.4		
Fish Consumption Per Capita	<i>kg</i>	7.30	7.60	7.80	8.90	8.00	8.00	8.00		
Milk And Dairy Products Consumption Per Capita	<i>kg</i>	19.9	15.2	26.3	24.0	27.0	30.2	34.4		
Cheese Consumption Per Capita	<i>kg</i>	8.6	8.6	12.0	11.8	11.5	11.7	10.4		
Oil And Fat Consumption Per Capita	<i>kg</i>									
Fruit Consumption Per Capita	<i>kg</i>	59.3	51.0	62.8	58.3	62.9	66.0	74.6		
Vegetables Consumption Per Capita	<i>kg</i>	73.0	80.8	74.6	85.4	88.4	97.2	94.4		

Source: National Statistical Office, World Bank, Eurostat, United Nations, OECD, Faostat and Helgi Analytics calculation. For more details, description and explanation of particular indicators, please, visit www.helgilibrary.com

MACROECONOMIC ROUND-UP		2003	2004	2005	2006	2007	2008	2009	2010	2011
GDP	<i>USD bil</i>	33.3	42.2	48.0	55.9	75.1	94.7	87.5	87.2	96.1
GDP Growth	%	4.8%	5.0%	6.7%	8.4%	10.5%	5.8%	-4.9%	4.2%	3.4%
GDP Per Capita	<i>USD</i>	6,164	7,806	8,859	10,312	13,836	17,406	16,042	15,971	17,804
Industrial Production Growth	%	15.2%	3.8%	0.8%	15.6%	17.0%	3.4%	-13.8%	18.8%	6.9%
Retail Sales Growth	%									
Government Budget Balance (As % Of GDP)	%	-2.8%	-2.4%	-2.8%	-3.2%	-1.8%	-2.1%	-8.0%	-7.7%	-4.8%
Public Debt (As % Of GDP)	%	42%	42%	34%	31%	30%	28%	36%	41%	43%
Unemployment Rate	%	17.5%	18.1%	16.2%	13.3%	11.0%	9.6%	12.1%	14.4%	13.5%
Gross Average Monthly Wage	<i>USD</i>	626	752	827	903	1,070	1,198	1,171	1,019	1,093
Foreign Debt (As % Of GDP)	%	54%	56%	56%	58%	59%	55%	75%	76%	
Imports (As % Of GDP)	%	78%	77%	81%	88%	88%	85%	104%	106%	
Exports (As % Of GDP)	%	76%	75%	76%	84%	87%	83%	100%	103%	
Current Account Balance (As % Of GDP)	%	-0.6%	-5.9%	-6.5%	-5.7%	-5.3%	-6.6%	-2.6%	-2.5%	0.1%
Foreign Exchange Reserves (Including Gold)	<i>USD bil</i>	12.1	14.9	15.5	13.4	19.0	18.8	1.8	2.2	
Foreign Exchange Reserves (As % Of Imports)	%	47%	46%	40%	27%	29%	23%	2%	2%	
Foreign Direct Investments	<i>USD bil</i>	0.6	3.0	2.4	4.2	3.4	3.2	0.0	0.6	
Foreign Direct Investments (As % Of GDP)	%	1.7%	7.2%	5.0%	7.5%	4.5%	3.4%	0.0%	0.6%	
Foreign Direct Investments (As % Of CA Deficit)	%	272%	122%	77%	131%	85%	51%	-1%	25%	
Workers' Remittances, Received (As % Of GDP)	%	1.3%	1.3%	2.0%	1.9%	2.0%	2.1%	1.9%		
Portfolio Investments (As % Of GDP)	%	-1.7%	2.0%	-2.0%	2.8%	-1.0%	2.6%	-1.3%	-1.8%	
Development Assistance (As % Of GDP)	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

INFLATION, FOREX & INTEREST RATES		2003	2004	2005	2006	2007	2008	2009	2010	2011
Inflation, CPI (Average)	%	8.6%	7.5%	2.7%	4.5%	2.8%	4.6%	0.9%	0.7%	4.1%
Long-Term Interest Rate (10-Year Gov. Bond Yield)	%	5.0%	5.0%	3.5%	4.4%	4.5%	4.7%	4.7%	3.9%	4.4%
Short-Term Interbank Interest Rate (3-Month)	%	6.2%	4.7%	2.9%	4.3%	4.3%	4.6%	1.2%	0.8%	1.4%
Interest Spread To USD, 10-Year Gov. Bond	%	1.0%	0.8%	-0.8%	-0.4%	-0.1%	1.1%	1.5%	0.7%	1.6%
Interest Spread To USD, 3M IBOR	%	5.0%	3.1%	-0.6%	-0.8%	-0.9%	1.4%	0.3%	0.3%	1.0%
FX Rate To USD (Average)	<i>per USD</i>	0.88	0.80	0.80	0.80	0.73	0.68	0.72	0.75	0.72
FX Rate To EUR (Average)	<i>per EUR</i>	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00

Source: National Statistical Office, National Central Bank, World Bank, Eurostat, United Nations and Helgi Analytics calculation. For more details, description and explanation of particular indicators, please, visit www.helgilibrary.com

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