

Understanding Russia's Regional Health Markets

June 2012



World Leaders in Health Industry Analysis



Understanding Russia's Regional Health Markets

© Copyright 2012 Espicom Business Intelligence

All rights reserved. No part of this publication may be reproduced or used in any form or by any means graphic, electronic or mechanical, including photocopying, recording, taping or storage in information retrieval systems without the express permission of the publisher.

Every care has been taken to ensure that the information contained in this report is correct. The publisher accepts no liability for decisions made on the basis of information contained herein.

British Library Cataloguing in Publication Data.
A catalogue record for this report is available from the British Library.

Contents

Summary.....	7
Geography	8
Political and Economic Background.....	9
Politics	9
Economy.....	10
Demography	11
Population.....	11
Demographic indicators.....	15
<i>Birth Rate</i>	15
<i>Death Rate</i>	15
<i>Infant Deaths</i>	15
<i>Life Expectancy at Birth</i>	15
Morbidity	16
Communicable Diseases.....	16
Non-communicable Diseases.....	30
Mortality	45
Healthcare Sector.....	52
Organisation	52
Concept for the Development of the Healthcare Sector until 2020.....	54
National Health Project.....	55
<i>Project Funding</i>	56
<i>Salary Increases for Healthcare Personnel</i>	56
<i>Procurement of New Equipment</i>	56
<i>Construction of Medical Centres</i>	57
<i>Increasing the Availability of Advanced Medical Treatment</i>	57
<i>Prenatal and Postnatal Care</i>	57
<i>Reducing the Mortality Rate Linked to Cardiovascular Diseases and Road Accidents</i>	58
<i>Reducing the Mortality Rate Linked to Cancer</i>	58
Regional Healthcare Modernisation Programme.....	58
Health Expenditure	60
Organisation of Expenditure.....	60
<i>Public Sector</i>	60
<i>Private Sector</i>	60
Locally-Sourced Expenditure Data.....	61
Primary Care.....	67
Hospital Facilities.....	72
Hospital Activity	90
Medical Personnel	96
Provincial Data Comparisons.....	107
National Comparison by Federal District.....	108
Central Federal District	109
<i>Geography</i>	109
<i>Demographics</i>	111
<i>Economic background</i>	113
<i>Healthcare expenditure</i>	116
<i>Healthcare facilities</i>	118
<i>Healthcare personnel</i>	121
Belgorod	123

Understanding Russia's Regional Health Markets 2012

Bryansk	124
Vladimir	125
Voronezh.....	126
Ivanovo.....	127
Kaluga.....	128
Kostroma.....	129
Kursk.....	130
Lipetsk.....	131
Moscow Region.....	132
Orel	133
Ryazan	134
Smolensk	135
Tambov	136
Tver	137
Tula	138
Yaroslavl	139
Moscow City	140
North West Federal District	142
<i>Geography.....</i>	142
<i>Demographics</i>	144
<i>Economic background.....</i>	146
<i>Healthcare expenditure</i>	149
<i>Healthcare facilities</i>	151
<i>Healthcare personnel</i>	154
Republic of Karelia	156
Republic of Komi	157
Archangelsk	158
Vologda	159
Kaliningrad	160
Leningrad (region).....	161
Murmansk	162
Novgorod.....	163
Pskov	164
St Petersburg	165
Southern Federal District.....	167
<i>Geography.....</i>	167
<i>Demographics</i>	169
<i>Economic background.....</i>	171
<i>Healthcare expenditure</i>	174
<i>Healthcare facilities</i>	176
<i>Healthcare personnel</i>	179
Republic of Adygea	181
Republic of Kalmykia.....	182
Krasnodar.....	183
Astrakhan	184
Volgograd.....	185
Rostov.....	186
North Caucasus Federal District.....	188
<i>Geography.....</i>	188
<i>Demographics</i>	190
<i>Economic background.....</i>	192
<i>Healthcare expenditure</i>	194
<i>Healthcare facilities</i>	196
<i>Healthcare personnel</i>	199
Republic of Dagestan	201

Understanding Russia's Regional Health Markets 2012

Republic of Ingushetia.....	202
Kabardino-Balkaria.....	203
Karachay-Cherkess Republic.....	204
Republic of North Ossetia-Alania	205
Chechen Republic.....	206
Stavropol.....	207
Volga Federal District	209
<i>Geography</i>	209
<i>Demographics</i>	211
<i>Economic background</i>	213
<i>Healthcare expenditure</i>	216
<i>Healthcare facilities</i>	218
<i>Healthcare personnel</i>	221
Republic of Bashkortostan	223
Republic of Mari El	224
Republic of Mordovia.....	225
Republic of Tatarstan	226
Udmurt Republic	227
Chuvash Republic	228
Perm.....	229
Kirov	230
Nizhny Novgorod.....	231
Orenburg	232
Penza	233
Samara.....	234
Saratov.....	235
Ulyanovsk.....	236
Ural Federal District	238
<i>Geography</i>	238
<i>Demographics</i>	240
<i>Economic background</i>	242
<i>Healthcare expenditure</i>	244
<i>Healthcare facilities</i>	246
<i>Healthcare personnel</i>	249
Kurgan.....	251
Sverdlovsk.....	252
Tyumen	253
Chelyabinsk.....	254
Siberian Federal District	256
<i>Geography</i>	256
<i>Demographics</i>	258
<i>Economic background</i>	260
<i>Healthcare expenditure</i>	262
<i>Healthcare facilities</i>	264
<i>Healthcare personnel</i>	267
Altai Republic	269
Republic of Buryatia	270
Republic of Tyva	271
Republic of Khakassia.....	272
Altai Territory.....	273
Trans-Baikal Territory.....	274
Krasnoyarsk	275
Irkutsk.....	276
Kemerovo.....	277
Novosibirsk.....	278

Understanding Russia's Regional Health Markets 2012

Omsk.....	279
Tomsk	280
Far Eastern Federal District.....	282
<i>Geography.....</i>	282
<i>Demographics</i>	284
<i>Economic background.....</i>	286
<i>Healthcare expenditure</i>	288
<i>Healthcare facilities</i>	290
<i>Healthcare personnel</i>	293
Republic of Sakha	295
Kamchatka	296
Primorski Krai.....	297
Khabarovsk	298
Amur.....	299
Magadan	300
Sakhalin	301
Jewish Autonomous Region.....	302
Chukotka Autonomous Okrug	303
Provincial Ranking Tables.....	304
Total Population by Region (millions).....	304
Population % Urban	306
Gross Regional Product (US\$ billions).....	308
Gross Regional Product Per Capita (US\$).....	310
Health & Social Services Expenditure, 2009 (US\$ billions).....	312
Health & Social Services Expenditure per capita, 2009 (US\$)	314
Obligatory Medical Insurance Expenditure, 2010 (US\$ millions).....	316
Obligatory Medical Insurance Expenditure Per Capita, 2010 (US\$).....	318
Birth Rate per 000 Population, 2010	320
Death Rate per 000 Population, 2010	322
Infant Mortality Rate per 000 Live Births, 2010	324
Total Number of Hospitals, 2010	326
Number of Private Hospitals, 2010.....	328
Number of Hospital Beds, 2010	330
Hospital Beds per 000 Population, 2010	332
Average Number of Beds per Hospital, 2010	334
Number of Clinics, 2010.....	336
Number of Physicians (000s), 2010	338
Physicians (rate per 000 Population), 2010.....	340
Number of Dentists (000s), 2010.....	342
Dentists (rate per 000 Population), 2010.....	344
Number of Nurses (000s), 2010	346
Nurses (rate per 000 Population), 2010	348
Number of Radiologists (000s), 2010	350
Radiologists (rate per 000 Population), 2010	352
Sources.....	354

List of Tables

Russian GDP and Real Growth, 2002-2012.....	10
Population Estimates, 1990-2010.....	11
Population by Gender & 5 Year Age Group, 2007-2010.....	12
Urban & Rural Population by Gender, 2007-2010.....	14
Principal demographic Indicators, 1995-2010	15
Incidence of Selected Infectious & Parasitic Diseases, 1995-2010 (000s)	16
Incidence of Infectious Diseases in Urban & Rural Areas, 2000-2010 (000s)	17
Incidence of Selected Infectious Diseases by Region, 2010 (Per 100,000 Population) ..	18
Incidence of Socially Significant Diseases by Region, 2010	22
Incidence of Active Tuberculosis by Age and Sex, 2000-2010.....	28
Incidence of Active Tuberculosis in Urban & Rural Areas, 1995-2010	28
Incidence of STIs, Fungal & Skin Diseases and Scabies, 1995-2010.....	29
Incidence of STIs in Urban & Rural Areas, 1995-2010	29
Incidence of Morbidity by Diagnosis, 2005-2010 (000s)	30
Incidence of Injury, Poisoning and Other External Causes, 2000-2010.....	31
Incidence of Morbidity by Diagnosis & Region, 2010 (Per 1,000 Population)	32
Incidence of Malignant Neoplasms by Age and Sex, 2000-2010	40
Incidence of Malignant Neoplasms by Sex and Site, 1995-2010 (000s).....	41
Incidence of Cancer in Urban & Rural Areas, 1995-2010	42
Incidence of Malignant Neoplasms by Region, 2010	43
Deaths by Cause, 2006-2010	45
Deaths by Cause, 2010.....	46
Leading Causes of Death by Region, 2010 (Per 100,000 Population)	47
Infant Mortality by Cause, 2004-2010	51
Infant Mortality by Cause, 2010.....	51
Receipt and Expenditure of the Social Insurance Fund, 2009-2010 (Million Rubles).....	61
Receipt and Expenditure of the Federal Compulsory Medical Insurance Fund, 2009-2010 (Million Rubles).....	62
Receipt and Expenditure of Territorial Funds on Compulsory Medical Insurance, 2009-2010 (Million Rubles).....	63
Voluntary Health Insurance Payments, 2000-2010 (Rubles 000s)	65
Outpatient Facilities by Type & Sector, 2000-2010	67
Outpatient Facilities by Type & Sector in Urban & Rural Areas, 1995-2010.....	68
MoH Outpatient Care Facilities, 1990-2010	68
Condition of MoH Outpatient Clinics, 1995-2010 (%).....	69
MoH Hospital Day Surgery Discharges by Group of Diseases, 2006-2010	70
MoH Outpatient Unit/Polyclinic Day Surgery Discharges by Group of Diseases, 2005-2010.....	71
Total Hospitals & Beds, 1990-2010	72
Condition of MoH Hospitals, 1995-2010	72
Hospitals & Beds by Sector, 1995-2010	73
Hospitals & Beds by Sector in Urban & Rural Areas, 1995-2010.....	74
Public Hospital Beds by Specialty, 1990-2010 (000s).....	75

Understanding Russia's Regional Health Markets 2012

Public Hospital Beds by Specialty, 2010 (000s)	75
Hospital Beds by Specialty & Region, 2010.....	76
Hospital Beds by Specialty & Region, 2010 (Per 10,000 Population).....	84
Public Hospital Activity, 1998-2010	90
MoH Hospital Activity by Type of Hospital, 2007-2010.....	91
Discharges in MoH Hospitals by Group of Diseases, 2006-2010	92
Discharges in MoH Hospitals by Group of Diseases, 2010.....	92
Average Stay in MoH Hospitals by Age & Group of Diseases, 2007-2010 (Days)	93
Surgical Procedures in MoH Hospitals, 2005-2010	94
Surgical Procedures in Public Hospitals, 2010	95
Public Sector Medical Personnel, 1990-2010 (000s)	96
Public Sector Doctors by Leading Specialty, 2003-2010 (000s)	97
Physicians by Specialty & Region, 2010	98