MEDTECH INSIGHT
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JEFHCLON16: Growth Strategies And What's In Store Post-US Election

by Tina Tan

The Jefferies 2016 London Healthcare Conference, the largest health-care-dedicated investor meeting in Europe, took place this week in London. More than 140 pharma, biotech and medtech companies formally presented, and many more attended to meet and connect with investors and potential commercial partners. This article rounds up the best Tweets posted by the *Medtech Insight* team attending #JEFHCLON16. It includes insights from a panel session on what's in store for health care in the US post-election, as well as company updates from LivaNova, Smith & Nephew, Coloplast, Varian Medical Systems and bioMérieux.

The 2016 Jefferies London Healthcare Conference, now in its seventh year, looks to be the biggest yet, with more than 140 companies across the health-care sector presenting, and many more delegates attending for one-on-one meetings with potential investors and partners.

While the majority of the presenting companies were in the pharma and biotech sectors, a handful of medtech companies, including many that are leaders in their respective fields, provided business updates and explained their growth strategies, while the asset managers in attendance looked to increase their portfolio value.

Company presentations aside, one of the more anticipated sessions was a lunchtime panel on the future of US health care under a Trump administration, and how the president-elect plans to make good his promises to abolish Obamacare, which he famously deemed "a catastrophe."

Among the panelists were Scott Gottlieb, former deputy commissioner at US FDA and Richard Tarplin of lobby firm Tarplin Strategies. Tarplin shared what his Washington sources have revealed about plans for repealing and replacing the Affordable Care Act:

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LivaNova

In terms of company presentations, first time at the conference in his new role as *LivaNova PLC*'s ($LIVN) CEO-elect is Damien McDonald. McDonald joined LivaNova as COO in October but was appointed successor to André-Michel Ballester, who will officially step down as CEO on Jan. 1. The news of the leadership change came just before LivaNova reported slow topline growth for the third-quarter. During the Q&A, McDonald, together with LivaNova CFO Vivid Sehgal, fielded questions about where the company's growth opportunities are, the challenges it needs to resolve and whether the merger of Cyberonics and Sorin (of which Ballaster was CEO before the transaction) to form LivaNova made sense and if the combined company's performance so far has been able to justify the rationale behind the deal.

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Coloplast

In his presentation, Anders Lonning-Skovgaard, CFO of intimate care products leader *Coloplast AS*, indicated that the Danish multinational has been growing at above average market rates as it continues to invest in building its presence in the emerging markets, particularly within the

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ostomy care and incontinence care space:

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bioMérieux

Sylvain Morgeau, investor relations manager of bioMérieux SA, highlighted the company's FilmArray multiplex-PCR technology, which it gained through its 2014 acquisition of BioFire Diagnostics. The technology saw 66% increase in sales for the first nine months of 2016 and drove double-digit growth of bioMérieux's molecular diagnostics division:

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Proton Therapy Rivals: Varian And Ion Beam

Neil Madle, director of investor relations and corporate communications at *Varian Medical Systems Inc.*, the specialist in radiotherapy systems, shared with delegates some figures on where the gaps in the global radiotherapy market are, and the company's strategy to expand its international presence and its proton therapy business:

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Varian's proton therapy rival and leader in that market, *Ion Beam Applications SA*, was presenting

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next door at the same time. It gave a bullish outlook to its growth trajectory as adoption of proton therapy continues to accelerate:

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Smith & Nephew

While the conference marked a first for some executives in new roles, like Damien McDonald of LivaNova, the meeting was also a swansong for some, like Julie Brown, who will be leaving her role as CFO of *Smith & Nephew PLC*. Brown joined the UK orthopedics and wound-care multinational in 2013 from AstraZeneca, and she will be leaving the life-sciences sector altogether in January 2017 to take on a role at luxury brand Burberry. Brown gave insight into Smith & Nephew's progress in achieving its key strategic priorities, which include simplifying the company structure, shifting its focus on higher-growth franchises and to expand its emerging market presence. She also touched on the recent challenges the company has faced in specific emerging markets like China and the Gulf:

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For more Tweets about companies that met up with Medtech Insight *and presented at the conference, including circulating tumor cell capture firm Angle; extremities implants specialist Wright Medical; and bionic vision systems company Pixium Vision, search for #JEFHCLON16 and follow @MedtechTinaTan and @MedtechCate.*

From the editors of Clinica

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