



The Impact of Coronavirus on Latin America's Healthcare System – Crisis Vs. Opportunity

Webinar, Latin America



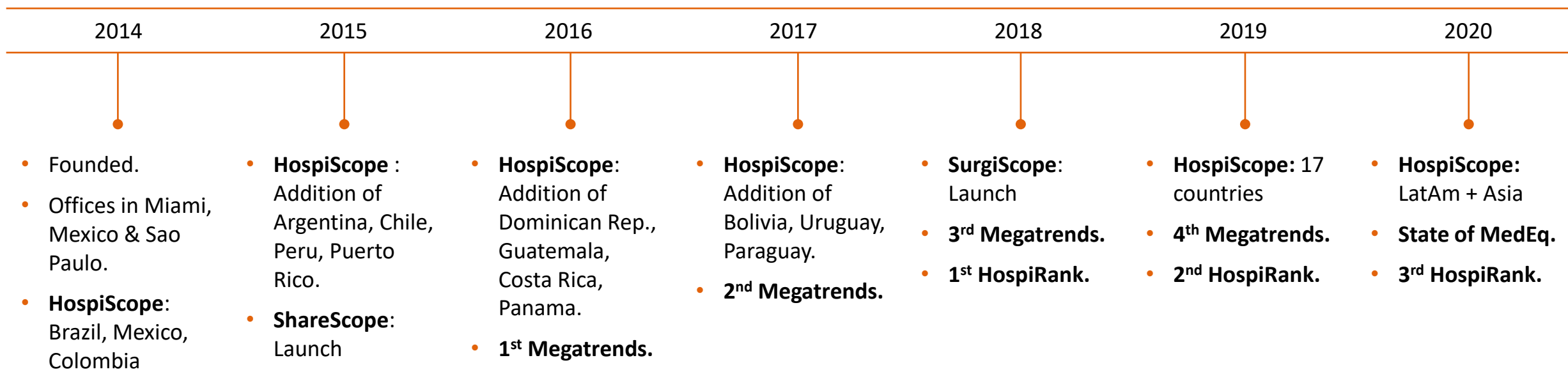
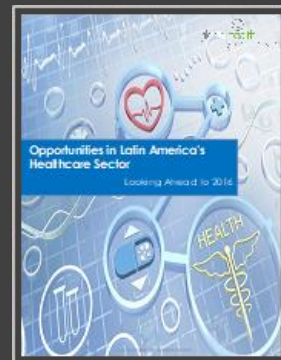
Legal Notice

The opinions and analysis presented in this webinar by Global Health Intelligence (GHI) represent only the views of the GHI speakers and NOT of the panelists who are participating in today's webinar or those of their respective companies.

The data on base installed equipment and technology use presented in this webinar was obtained from Latin American hospitals on a voluntary basis in 2018 and 2019. Global Health Intelligence is not responsible for the accuracy of the data provided nor is it legally liable should any of it prove to be incorrect. The data are provided without warranties of any kind, whether express or implied, including, but not limited to, implied warranties of success, quality for a particular purpose, non-infringement or course of performance.

It is expected that webinar attendees will use the information provided in this webinar in conjunction with other information and with sound management practices. Therefore, Global Health Intelligence will not assume responsibility for commercial loss due to business decisions made on the use or non-use of the information provided in today's webinar.

Actionable insights
Built on 20+ years experience
in Market Intelligence.





Today's guests

INTELLIGENCE.HEALTH

Today's speakers



Mariana Romero Roy
Director of Business Dev. & Intel
Global Health Intelligence
mariana@intelligence.health



Guillaume Corpart
Founder & CEO
Global Health Intelligence
gc@intelligence.health



Agustin Zabulanes
Country Director - Mexico
Boston Scientific
agustin.zabulanes@bsci.com



Dr. Benjamín Villaseñor, MD
Innovation Director
Grupo Diagnóstico Médico Proa
benjamin.villasenor@proa.com.mx

Agenda

1. Latin America in the Global Context
2. Foreseeable impact of COVID-19
3. Crisis & Opportunity
4. Questions & Answers



Poll Question

In your opinion, how ready is Latin America to deal with a pandemic such as COVID-19?

- Totally unprepared
- Somewhat unprepared
- Somewhat prepared
- Very prepared

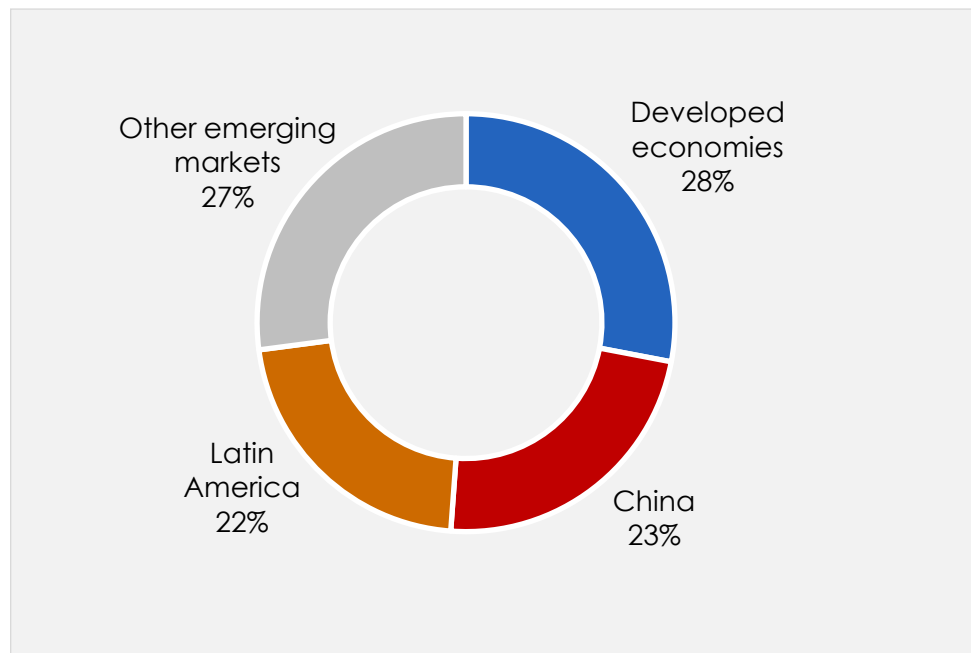


Latin America in the Global Context

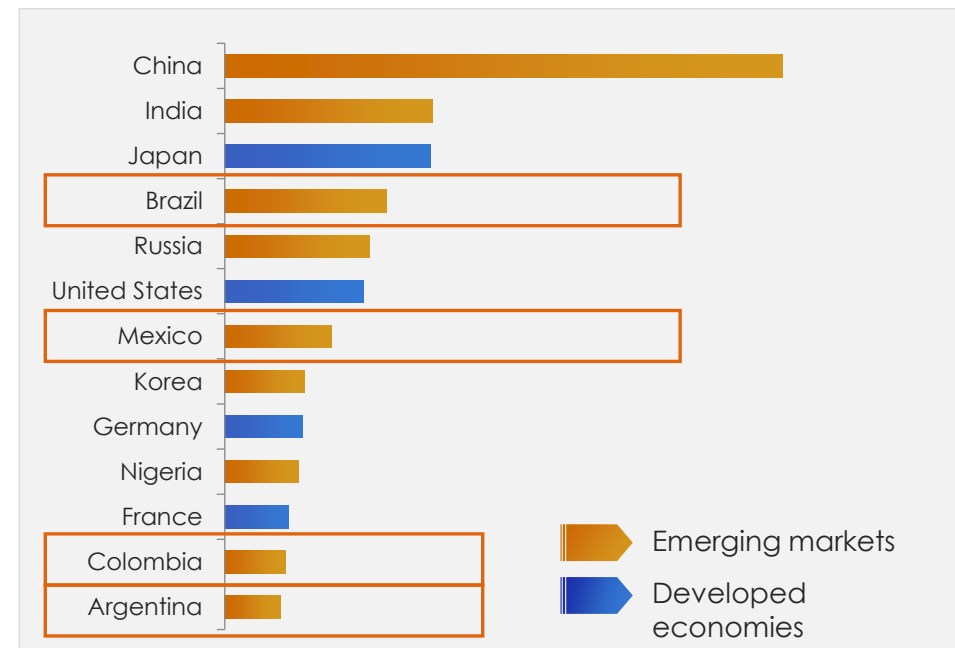
INTELLIGENCE.HEALTH

Latin America is home to nearly 1/4 of the world's hospitals

Number of Hospitals by Economy



Number of Hospitals by Country

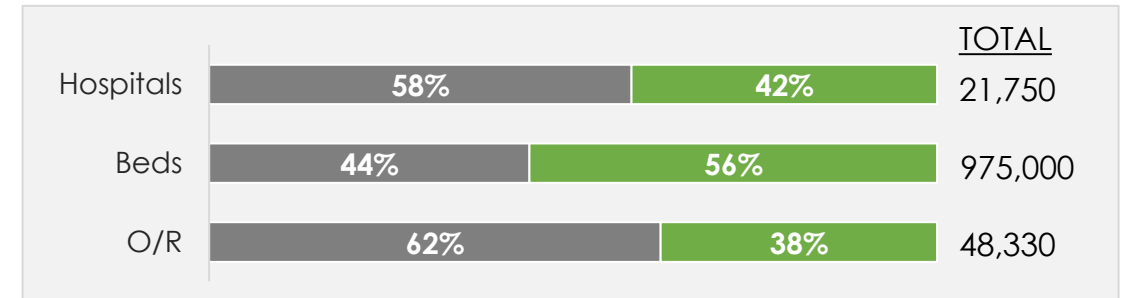


- There are 3x as many hospitals in emerging markets as there are in developed economies.
- Out of the top 10 emerging markets, 4 are in Latin America.

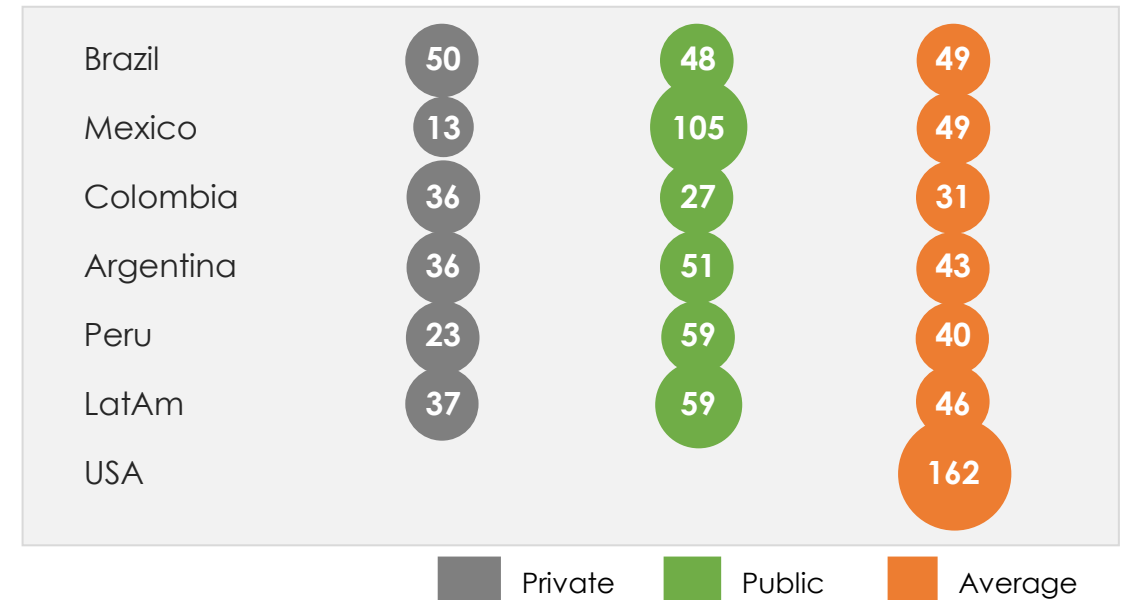
The structure of hospitals will limit ramp-up speed and capabilities

- Hospitals across Latin America are on average 3.5x smaller than those of the US.
- There is a vast size difference between Public and Private institutions.

Infrastructure Breakdown in LAC



Average hospital size (# of beds)

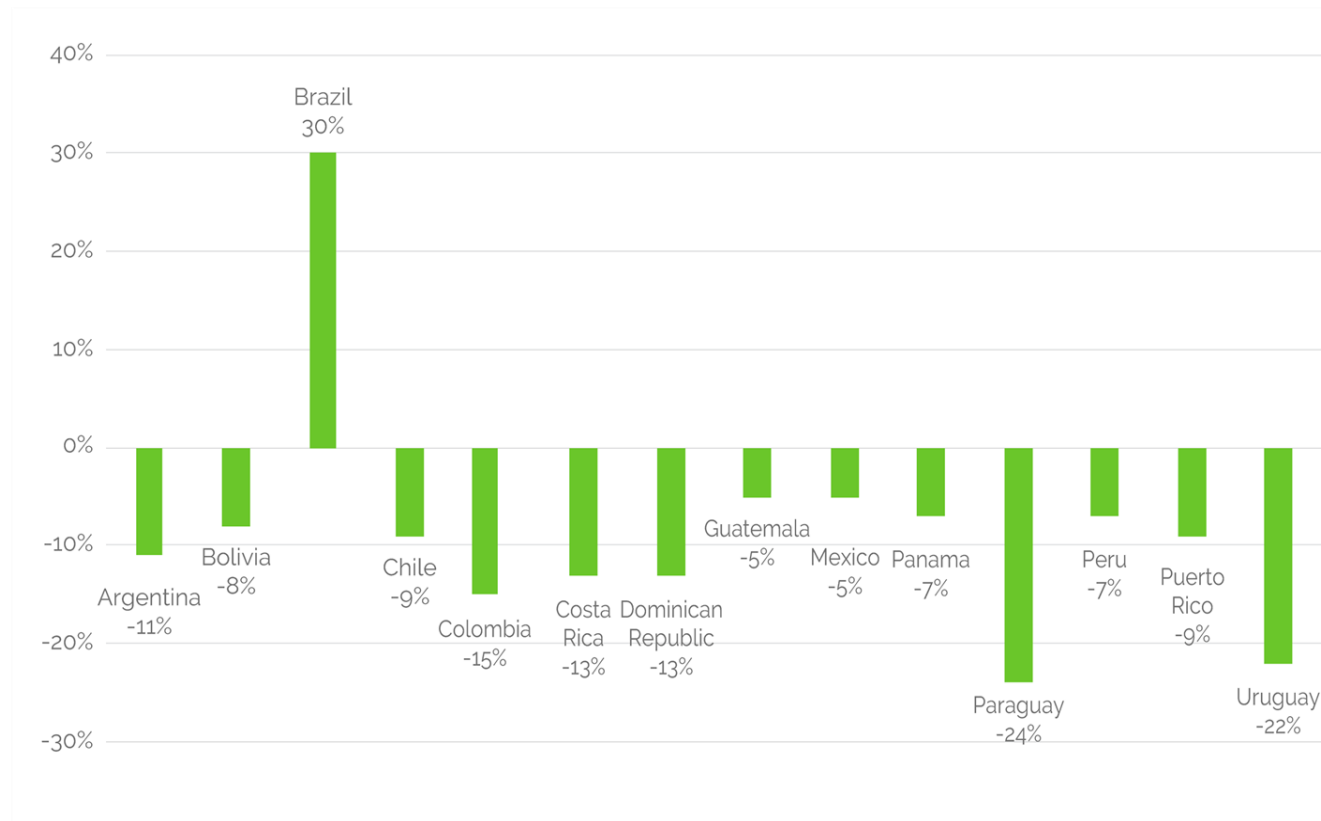


WHAT DOES THIS MEAN IN THE FACE OF A PANDEMIC?

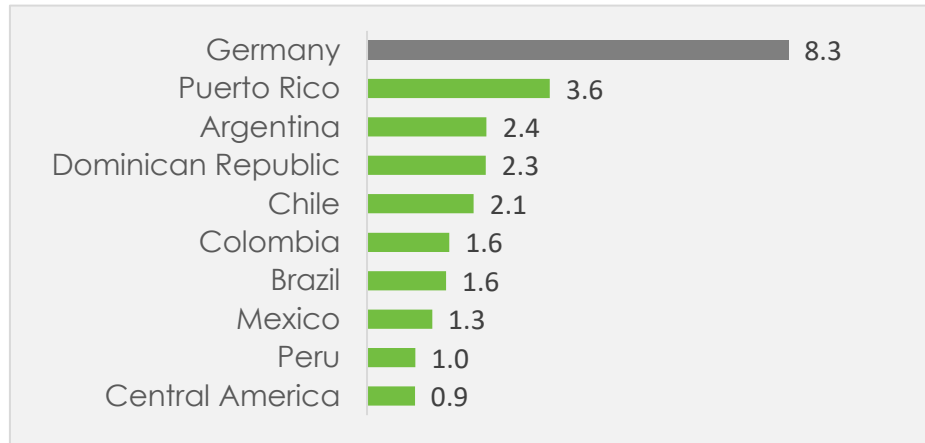
- Hospitals in LAC **don't have the same leveraging capabilities** as those in other regions in order to acquire capital equipment and expand their capacity.
- Acquiring equipment **happens in a fragmented manner** rather than a coordinated effort.
- Getting the equipment to hospitals is **more complicated** and will **take more** time to install.

LatAm has limited initial capacity further cramped by a reduction of the installed base of ventilators in recent years

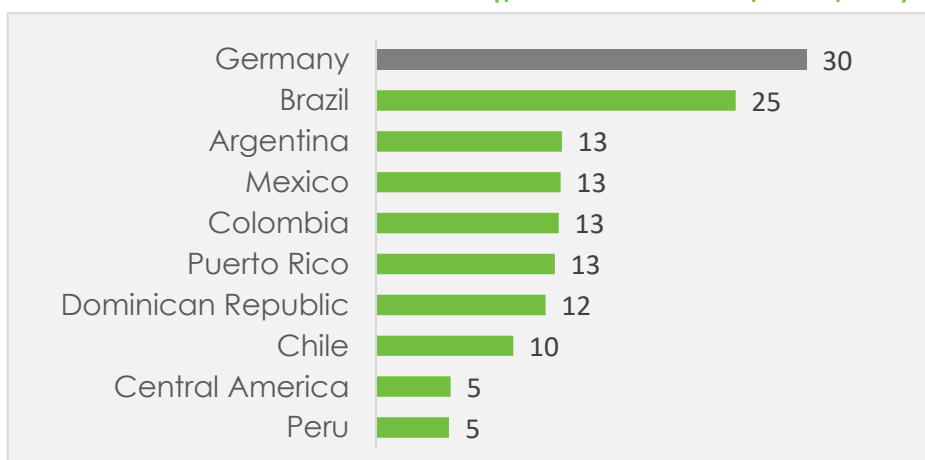
Ventilator Counts in Latin American Hospitals, 2017-2019



Number of Hospital Beds (per 1,000 people)

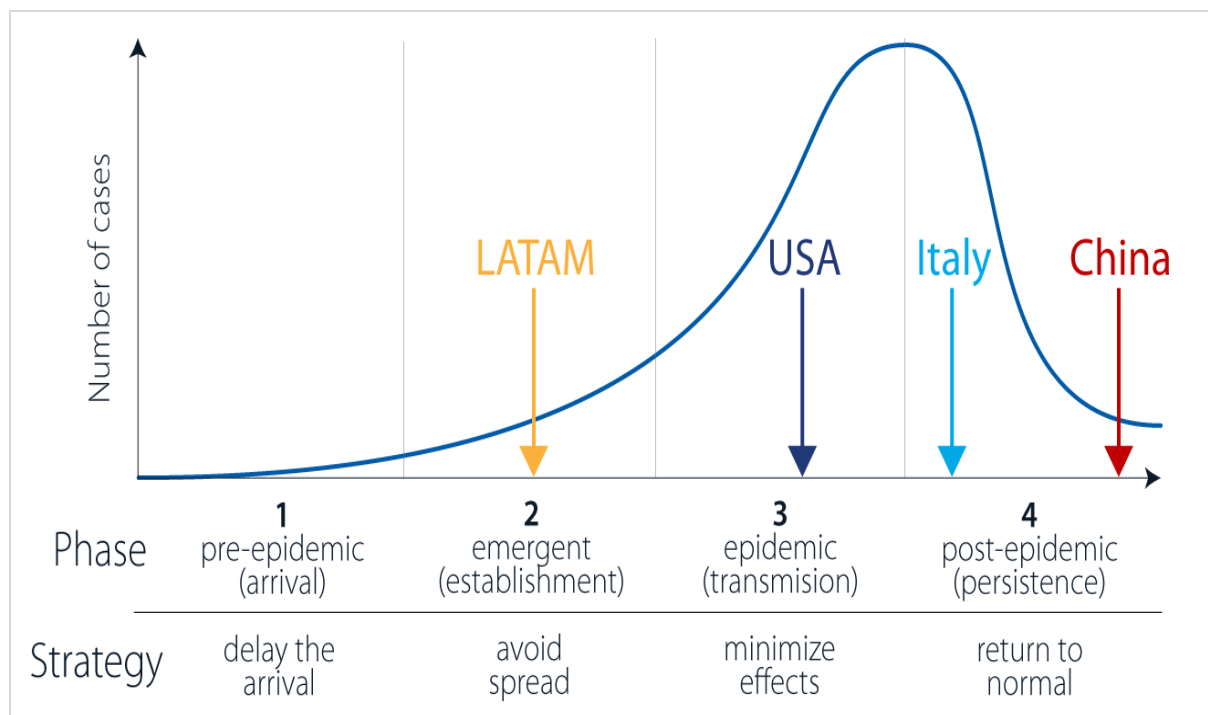


Number of Ventilators (per 100,000 people)

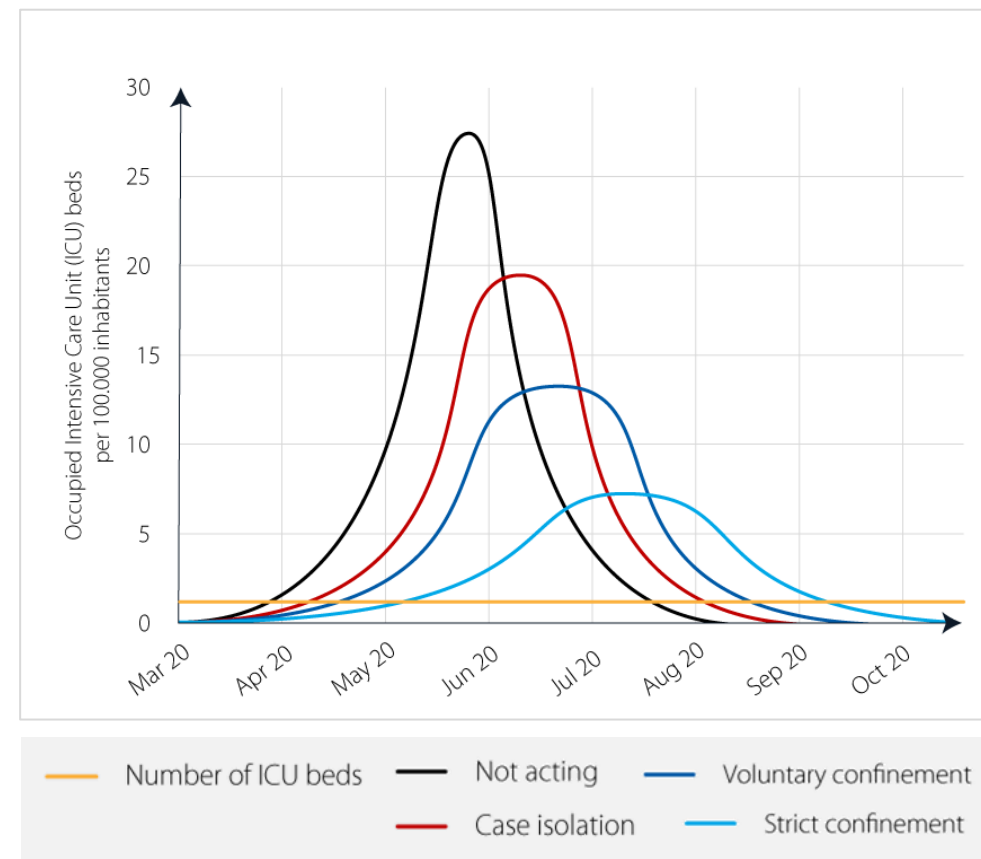


Latin America needs to “flatten the curve”

Epidemic Phases and their Respective Strategies



COVID-19 Pandemic Scenarios for LatAm



Poll Question

In your opinion, which industry sectors stand to come out ahead of the COVID-19 crisis?

- HR and HR services
- Hospital supplies
- Insurance companies
- Private care
- Telemedicine
- Remote communication tools



Foreseeable impact of COVID-19

INTELLIGENCE.HEALTH

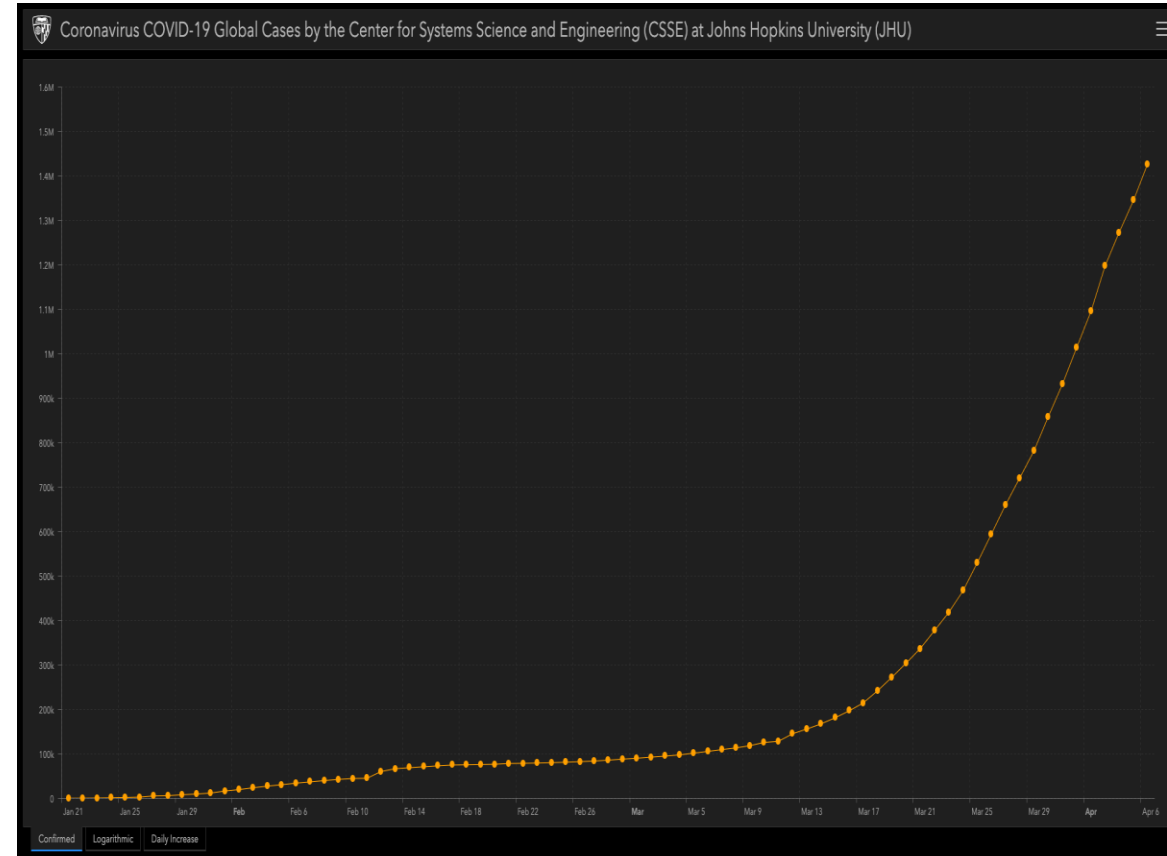
Exponential patient surge will stress the system



PATIENT SURGE

- The patient surge is pushing hospital systems to the limits of their capacity.
 - Hospitals are setting up tented triage areas outside their facilities to diagnose patients outside confines of the hospital.
- COVID-19 reached Latin America later than other regions, indicating an offset in regard to the stress on the hospital systems.

Reported cases of COVID-19, Globally

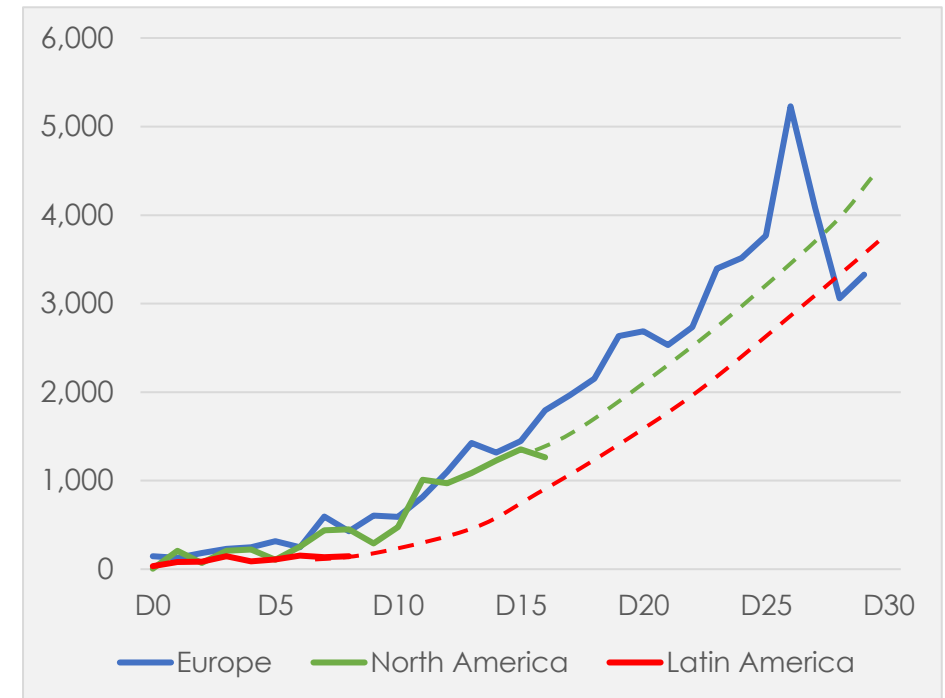


Source: John Hopkins University
Date: April 8, 2020

Latin America follows global epidemiology trends; yet under-reporting cases

- Latin America is under-reporting cases while tests have yet to be widespread.
- Social distancing measures were implemented at different times across the region, thus impacting the spread of the virus.
 - Argentina and Colombia started social distancing early (March 12) and reported 42 and 25 deaths respectively by April 5. Both countries are currently on total lockdown.
 - Brazil and Mexico started social distancing a week later (March 19) and reported 359 and 60 deaths respectively by April 5. Both countries are currently on partial lockdown.
- The first 200 deaths associated to COVID-19 were reached at different times across the globe:
 - Europe: March 9
 - North America: March 22 (11 days after Europe)
 - Latin America: March 28 (8 days after North America)
- D-0 represents the day that the region surpassed 200 reported deaths associated to COVID-19.

Reported deaths per day, by region



Source: WHO Situation Reports

The surge in patients is pressuring the installed capacity



PATIENT SURGE

Installed capacity

- Engulfs and consumes entire HC system capacity
- Public HC can no longer meet demand

Dealing with reality

- Stopping all Hospital projects in order to focus 100% on supporting frontline staff
- Other conditions are no longer treated (ex: cardiovascular care)

Areas experiencing the greatest stress

INFRASTRUCTURE

- Require Public / Private collaboration to increase capacity

HR

- Integration of additional medical staff into systems (students, retired staff, emergency workers, etc.)
- Manage burn-outs (psychological support) for frontline staff + support staff (specifically IT)
- Leadership and Communication

TECHNOLOGY

- 100% focused on dealing with the crisis
- E-training: Onboarding new staff (docs, nurses, support, etc.)
- Increased use of collaboration tools
- Control and measure what is going on in the H at all times
 - Occupation rates; Ventilator usage
- Increased collaboration between hospitals
 - Occupation rates, Ventilator usage, Patient flows
 - Security protocols
- Telehealth: Ramp up and increase
- Increased internet demand (penetration and speed) – fixed line infrastructure of 90%
- Increase in Cybersecurity attacks

MATERIALS

- Supply chain
- Gowns, gloves, face masks, etc.
- Disinfectants, gels, etc.

TRIAGE

- Ability for patients to self screen
- Options for patients to stay away from the H
- Alleviate the system; Reduce the spread

Poll Question

Given the current context, what type of LatAm market information would be most helpful for you?

- Reports on installed base of equipment
- List of hospitals by number of beds and ICUs
- Lists of procedures and in which hospitals they are being conducted
- Reports on which products are selling the most right now



Crisis and Opportunity

INTELLIGENCE.HEALTH


Areas in Crisis and Areas for Opportunity

CRISIS

- Supply chain interruptions (diagnostics, equipment, etc.)
- Frontline staff under pressure
- IT function as critical nerve
- Displacement of other surgeries
- HCPs risk
- Lack of capacity and not enough processes in place to flatten the curve
- Lack of accountability and social responsibility

OPPORTUNITY

- Leadership – Redefine our businesses
- Change implementation
- Innovation – How we work, How we deliver care
- Collaboration across HC ecosystems stakeholders
- Adoption of new technologies - HC better, less expensive, faster and more accessible
- Increase Preventive care and early treatments
- Simplify processes



HOSPISCOPE

The world's largest hospital database focused on emerging markets.

HOSPISCOPE will let you gain unparalleled market knowledge, including commercial target identification, key account insights, blind spot reduction and market mapping.

- ✓ 89% coverage, 55% fill rate
- ✓ 17 countries
- ✓ Beds, Equipment, Installed base, Technology, Infrastructure

SURGISCOPE

Real-world procedural data to help you target your clients more effectively.

SURGISCOPE will let you gain detailed knowledge on how many procedures are being conducted and in which institutions.

- ✓ Brazil, Mexico, Colombia, Chile
- ✓ Over 2 M procedures mapped
- ✓ Annual data by institution

SHARESCOPE

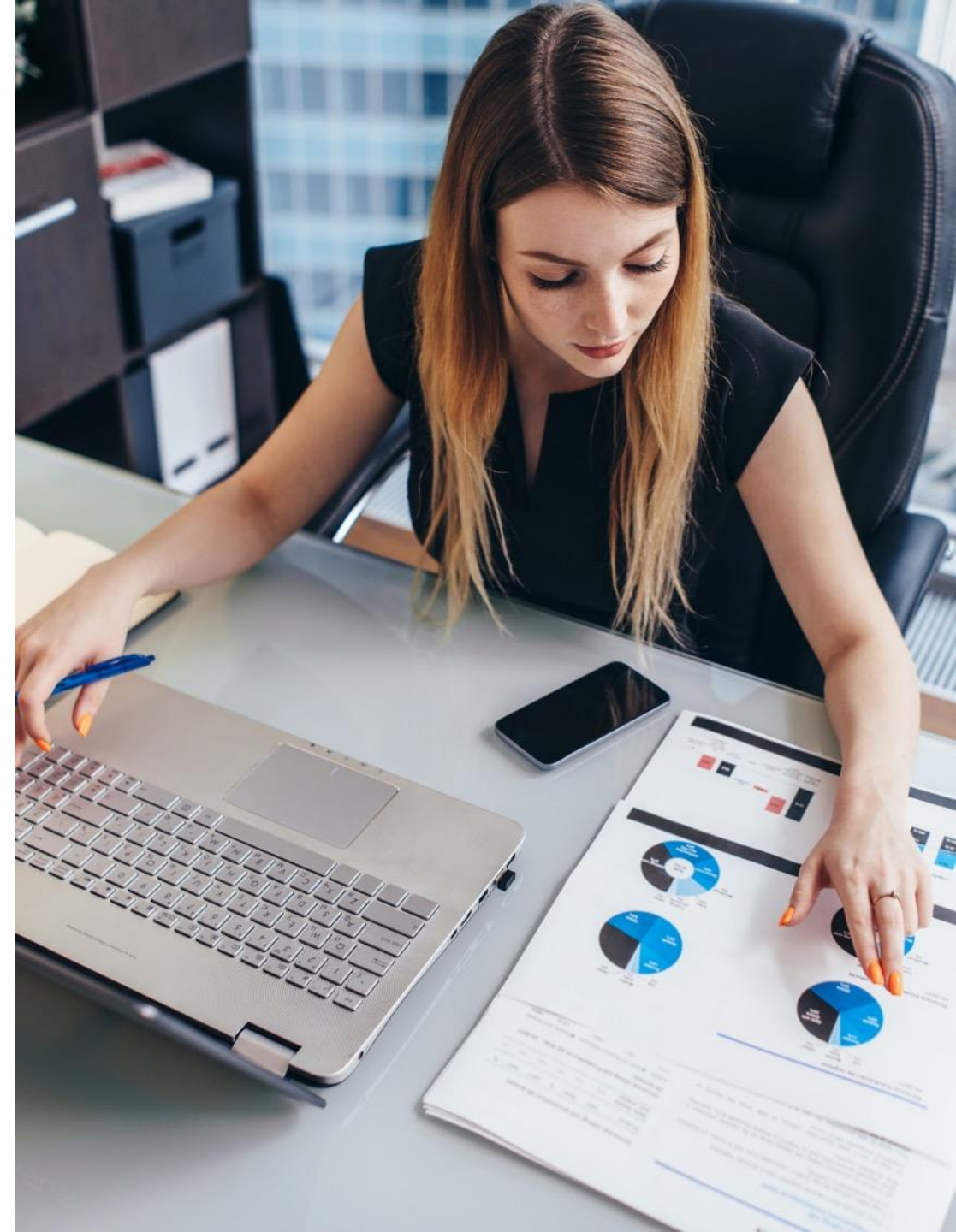
SHARESCOPE allows equipment and device manufacturers to track the **size of the market** and their **market share** in a consistent and accurate manner.

- ✓ 95% accuracy
- ✓ Quarterly updates
- ✓ Global product catalogue & SKUs

IN-SCOPE

Global Health Intelligence is your source for actionable market intelligence assignments.

- ✓ Opportunity analysis
- ✓ Positioning & competitive analysis
- ✓ Market sizing and segmentation
- ✓ Partner search & market due diligence
- ✓ Best practices





Questions and Answers

INTELLIGENCE.HEALTH



INTELLIGENCE.HEALTH

MIAMI

95 Merrick Way, 3rd Floor
Coral Gables, FL 33134
USA
+1 305 938-0234

MEXICO CITY

Pestalozzi 923-B
Col. Narvarte, CDMX 03100
Mexico
+52 (55) 7586-5045

SAO PAULO

Rua Cap. Cassiano Ricardo de
Tolêdo, 191 – sala 415
Centro, Jundiaí, SP 13201-840
+55 (11) 98020-2006