LatAm Healthcare Pulse

Key data and perspectives on patient care

Brazil

GHI has been monitoring health care trends in Latin America throughout the COVID-19 crisis, interviewing physicians, surgeons and medical staff on a regular basis to understand how the pandemic, global market supply chains, and government policy are affecting patient health outcomes and healthcare market dynamics.

In this brief, we report key insights and local medical perspectives from Brazil in the first quarter of 2021, from primary research conducted with experts in cardiology, neurology, endocrinology, and other areas of general surgery.

General

- General, non-emergency surgeries have fallen across the board, by an estimated 40% since the onset of the pandemic.
- Hospitals predict they will regain pre-pandemic patient and procedure volumes by the first or second quarter of 2022. The increase will be gradual over the course of the next 9-12 months, and is contingent on the pace of vaccinations.
- The pandemic will lead to definitive changes in how healthcare is delivered, with physicians and hospitals already preparing for future trends:
  - Hospitals are planning for and investing in patient screening technology and new safety protocols onsite,
  - The goal is to minimize human interactions, wait times, and any unnecessary touchpoints. Smartphone apps are likely to be the first innovation to accelerate patient in-take, with more sophisticated patient screening technology coming thereafter.

"Today, upon arrival at the hospital, patients go through trauma screening, usually performed by a nurse or technician. These nurses will probably be replaced by robots (machines) to measure blood pressure, temperature, oximetry, heart rate and even a small ECG, and will also be able to answer questions."

—Orthopedic surgeon and traumatology specialist, large private hospital, São Paulo, Brazil (March 2021).

Neurosciences

- GHI interviewed leading neurosurgeons, orthopedic surgeons, cardiovascular surgeons over the course of the first quarter of 2021 to understand how the dynamics of COVID-19 are affecting high specialized surgical procedures.
- On average, large private hospitals and centers of excellence in neurosciences have seen declines of 15-20% in patient and procedure volumes, especially in São Paulo state. The cost of procedures, however, have remained unchanged.
- In spite of the significant COVID-19 caseloads in the first quarter of 2021, hospitals expect volumes to return to pre-COVID levels in 6-9 months.
- Other regions and smaller, specialized clinics and centers of excellence have seen mixed results: some have maintained steady patient and procedures volumes, while a few have even gained new patients seeking elective surgeries that cannot be carried out at larger institutions, which are dealing with an influx of COVID patients.
- Indeed, underlying growth trends in orthopedic head and neck surgeries remain strong.

"The number of patients in the specialties will continue to increase, especially among women due to the question of Thyroid nodules"

—Neurologist, medium-sized private Hospital, São Paulo State, Brazil (March 2021).

Cardio

- Cardiovascular surgeons and cardiologists have fared differently across Brazil: many surgeons have reported increases of up to 35% in patient volumes, especially at recognized centers of excellence in São Paulo state.
- On the other hand, specialists at regional hospitals and smaller urban centers have reported declines in procedure volumes in line with other surgeries, i.e., approximately a third to 40% less than in pre-Covid times. Hospitals expect patient volumes to return to pre-pandemic levels in a 6-month time period, by the end of 2021.
- As in other specialties, the drop in procedure volumes is mainly due to elective surgeries and procedures such as non-emergency device replacement being postponed.
- For the procedures that are occurring at regional private hospitals, surgeons have reported shortage of supplies and price increases in select devices such as protheses, pushing up the cost of procedures in some areas.

GHI will continue to report on noteworthy trends in-country. For more in-depth market intelligence and insights, please contact us directly at: **info@globalhealthintelligence.com**

About GHI

Global Health Intelligence (GHI) is the leading provider of data analytics for Latin American healthcare, specializing in the region's hospitals. Its databases deliver strategic market data for medical equipment/devices manufacturers that allow them to identify new sales opportunities, gauge demand for new products, understand their market share vs. those of their competitors, spot trends in the acquisition of products, determine market needs and more.