

LatAm Healthcare Pulse

Key data and perspectives on patient care

Colombia

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 Colombia 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 35%.
- Hospitals expect to regain pre-pandemic patient and procedure volumes gradually by the last quarter of 2021, depending on the pace of vaccinations.
- Private hospitals in Colombia report cost increases for surgical procedures due to shortages in critical supplies, such as anesthetics, protective gear, and critical medical devices. These shortages are more acute in regional hospitals and clinics in smaller urban centers.
- Many hospitals will have to restock once the worst of the pandemic is over: medical equipment suppliers should prepare for bulk orders and position themselves with sufficient inventory when public health and hospital budgets are allocated for 2022.
- Patient and procedure volumes for specialized and urgent surgeries have remained stable; elective procedures, however, have been postponed, including in such specialties as orthopedic surgery, and cardiovascular interventions.

“Costs have moved due to the pandemic. Most of the surgeries that were performed were emergency procedures and we had to use the supplies that were in stock or that could be obtained at the time.”

—Laparoscopic Surgeon, large private hospital, Bogotá, Colombia (March 2021).

"Costs have risen due to the urgency of the procedures. This means that supplies are sought at however much they cost, or we pay more for faster deliveries."

—General Surgeon, large private hospital, Medellín, Colombia (March 2021).

"Due to the lack of availability of medical devices in the market, procedures have a higher cost."

—Chief of Surgery, 100-bed private clinic, Medellín, Colombia (March 2021).

"Because of the great demand for supplies such as anesthetics, surgical kits as well as protective equipment for surgery, costs have risen due to shortages."

—Head of Surgery and Hospitalization, small regional clinic near Cali, Colombia (March 2021).

- Patient and procedure volumes for specialized and urgent surgeries have remained stable; elective procedures, however, have been postponed, including in such specialties as orthopedic surgery, and cardiovascular interventions.
- Contrary to routine surgeries, the cost of specialized procedures has not been affected by the dynamics of the pandemic.
- As a result, there is a significant variance in how hospitals have fared: some specialized clinics have maintained procedure volumes, whereas other private hospitals have seen decline in procedure volumes as high as 50%. Cardiovascular and cardiology procedures, for instance, have fallen across the board by an average of 45% throughout the country, and as much as 60% in some hospitals.
- Given the pace of vaccinations, private hospitals expect specialized procedure volumes to return to pre-pandemic by year end 2021, and in some cases later.

Diabetes

- Diabetes patient volumes have decreased by up to 30-40% in many areas, though some specialized clinics have maintained their client base.
- Indeed, underlying trends remain unchanged: given unhealthy lifestyles and rising obesity, diabetes and heart disease will continue to grow, regardless of the temporary halt in procedures or treatments due to the pandemic. In fact, the pandemic may in fact exacerbate the obesity crisis: Endocrinologists in Colombia warn that "the confinement at home will cause more weight problems and diabetes."
- The challenge in managing diabetic patients will be to ensure uninterrupted treatments in the context of stay-at-home orders. As one endocrinologist noted: "Most of my patients cannot use continuous blood glucose meters at this time of pandemic, which must be changed every 14 days."

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.