

WEBINAR

The Market Outlook for Medical Equipment in Latin America

INTELLIGENCE.HEALTH



Medical Equipment Market Report: **Latin America 2021**

Key data for medical equipment professionals

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



2014

2015

2016

2017

2018

2019

2020

2021

- Founded.
- Offices in Miami, Mexico & Sao Paulo
- HospiScope: Brazil, Mexico, Colombia

- HospiScope : Addition of Argentina, Chile, Peru, Puerto Rico.
- ShareScope: Launch

- HospiScope: Addition of DR, Panama, Guatemala, Costa Rica
- 1st Megatrends

- HospiScope: Addition of Bolivia, Uruguay, Paraguay
- 2nd Megatrends

- SurgiScope: Launch
- 3rd Megatrends
- 1st HospiRank

- HospiScope: 17 countries
- 4th Megatrends
- 2nd HospiRank

- HospiScope: LatAm + Asia
- 3rd HospiRank.
- 1st MedEq Market report

- HospiScope: LatAm + Asia
- 4th HospiRank.
- 2nd MedEq Market report

Today's
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Latin America 2021

Key data for medical equipment professionals

Today's Agenda

1. Latin America's Hospitals and Technology Adoption
2. 2022 Market Outlook
3. Questions & Answers

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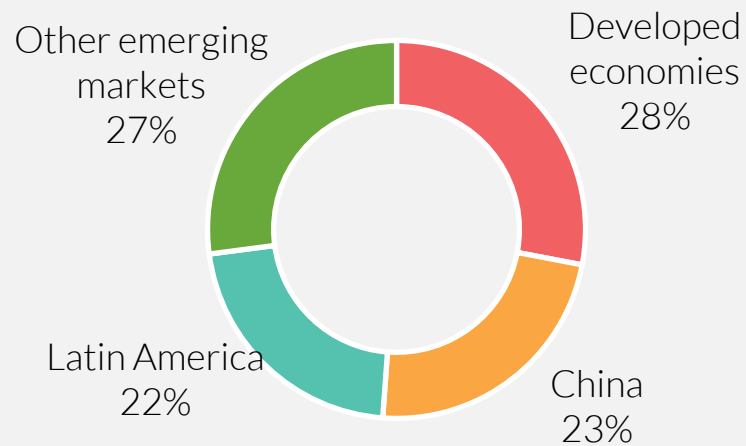
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1. Latin America's Hospitals and Technology Adoption
2. 2022 Market Outlook
3. Questions & Answers

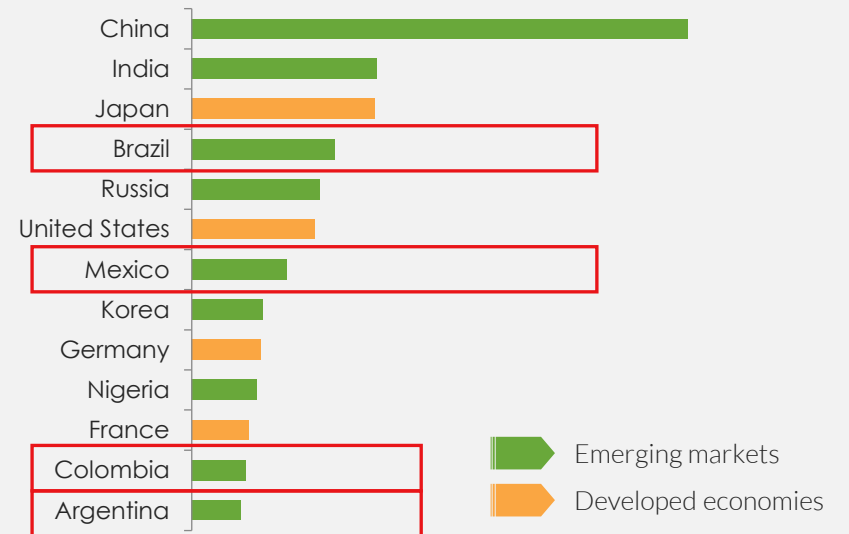
Latin America is home to nearly

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

limits ramp-up speed and capabilities

- The LatAm hospital market is more fragmented, with many, smaller players.
 - The average Latin American hospital has 56 beds, compared to 162 beds in the USA and Europe.
 - Chile stands out across the region for having 134 beds per hospital.
- There are fewer hospitals with the capacity to develop centers of expertise (based on size / throughput), with more hospitals tending to primary care.
- Hospitals don't have the same leveraging capabilities as those in other regions in order to acquire tech equipment and expand their capacity.

LatAm hospital infrastructure totals



20,541

hospitals



1,153,950

hospital beds



51,517

operating rooms



19,882

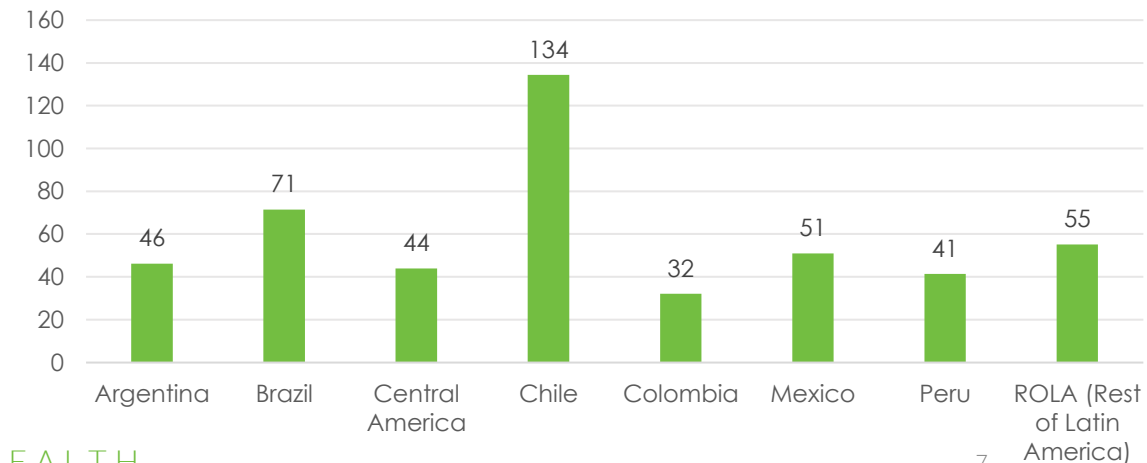
delivery rooms



1,347,677

doctors

Average number of beds per hospital



Smaller hospitals result in

lower equipment penetration

3 pillars are required to effectively run a healthcare system

1. **Medical institutions** – such as hospitals, clinics, laboratories, diagnostic centers, etc.
2. **Equipment** – such as capital equipment, devices, technologies, pharmaceuticals, etc.
3. **Professional staff** – such as nurses, physicians, technicians, etc.

Latin America is ahead of the OECD* average in medical institutions, but is **underequipped** and **understaffed** compared to other countries in the OECD.



Institutions



Equipment



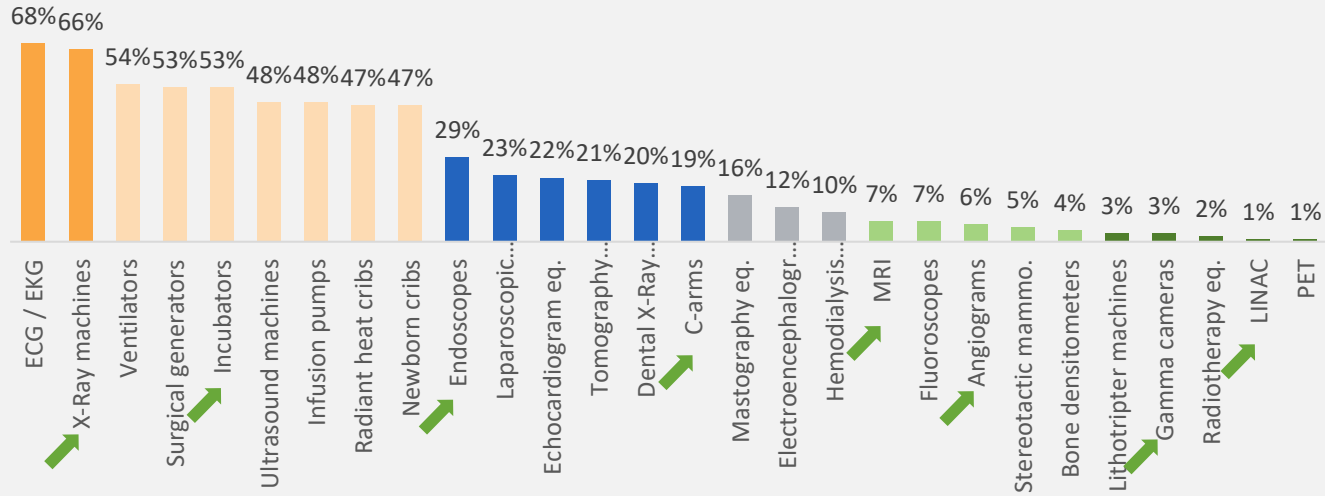
Staff

	LatAm	OECD*
Hospitals /1M	34.1	32.2
Beds /1k	1.7	4.7
Docs /1k	2.0	3.0
Nurses /1k	1.9	7.9

Presence of equipment is determined by

healthcare needs, usage and costs

Presence* of Modalities in LatAm



- Equipment used to diagnose and treat common needs are more present than specialized equipment (66% of hospitals have X-ray machines versus 3% of hospitals have Gamma cameras).
- The TechTier Adoption Model gives users an easy understanding of a hospital's technology adoption based on the type of equipment it has implemented within the facility.

TechTier Adoption Model

TIER	EQUIPMENT	PREVALENCE	% OF HOSPITALS
1	<ul style="list-style-type: none"> PET + LINAC Radiotherapy eq. Lithotripter machine Gamma camera 	1 - 5 eq. /100 H	5%
2	<ul style="list-style-type: none"> Bone densitometer Stereotactic mammography Angiograms MRI Fluoroscopes 	5 - 15 eq. /100 H	20%
3	<ul style="list-style-type: none"> Electroencephalogram Mammography eq. Tomography scanners C-arms Echocardiogram machines 	15 - 35 eq. /100 H.	50%
4	<ul style="list-style-type: none"> Laparoscopic surgery eq. Ultrasound machines Surgical generators Endoscopes 	35 - 90 eq. /100 H	85%
5	<ul style="list-style-type: none"> Hemodialysis machines X-Ray machines Radiant heat cribs Incubators 	90 - 250 eq. /100 H.	95%
6	<ul style="list-style-type: none"> Newborn cribs Ventilators Electrocardiogram machines Infusion pumps 	> 250 eq. /100 H	100%

Poll Question

30-minute consultation with GHI leadership team members

- Yes, I would find a 30-minute consultation useful – please contact me soon
- Sounds interesting but not now. Please contact me in 3 months
- No, I am not interested

1. Latin America's Hospitals and Technology Adoption
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Latin America will

recover in late 2022 from the significant economic pain inflicted by COVID-19






- Economic recovery lags behind North America.
- Lower tax collection will curtail public sector budgets in 2022.
- Private sector layoffs led to drop in Privately insured individuals. Return to pre-pandemic level not expected until late 2022, in line with economic recovery.



Vaccination drives are

key to recovery of medical equipment sales

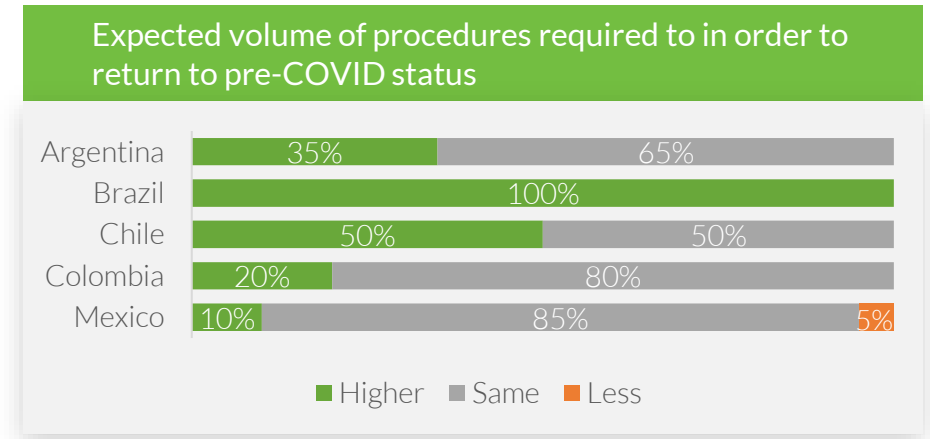
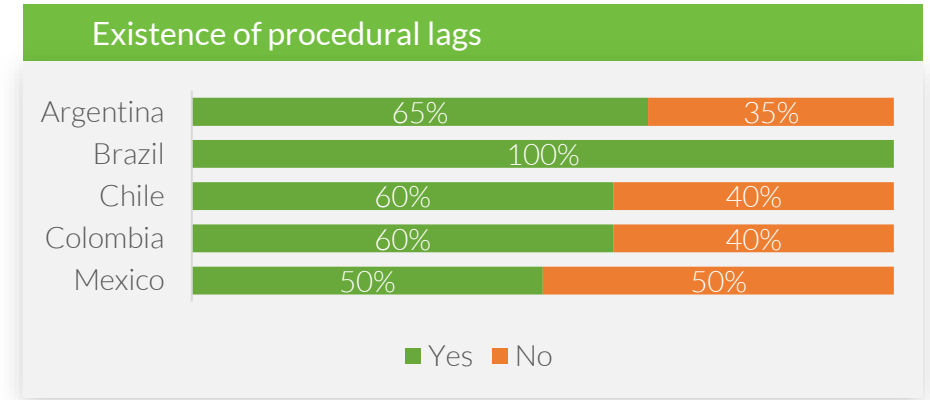
- Surge in critical equipment to treat COVID-19 patients (PPE, ventilators, etc.) will hold up until Q4 2021 then taper off.
- Domestic supply chains will slowly overcome lockdown-induced disruptions.
- Private hospitals will be back on their feet faster than public institutions and will look to restock depleted inventories of medical devices and equipment starting in Q4 2021.
- Move towards more economical / value-based products will continue, especially in the public sector. Sales of premium goods tighter and will be fought over.

Estimated date to reach herd immunity		
	Argentina	2021 Q4
	Brazil	2021 Q4
	Chile	2021 Q3
	Colombia	2022 Q2
	Mexico	2022 Q1

Stretched healthcare systems are

returning gradually to pre-pandemic level operations

- Lag in procedures volumes: Procedures are returning gradually from 50%-70% below their pre-COVID levels.
- Return to pre-pandemic levels by Q1 2022.
 - Scheduled procedures on the rise regionally (except Chile)
 - 67% of hospitals expect procedures volumes to exceed pre-pandemic levels.
- Delay of purchases of high capital-intensive equipment to persist.










Basic equipment will

expand through 2021 and onward

- Basic equipment will expand through 2021 and onward.
 - The pandemic has made hospitals (and hospital systems) aware of the importance of being well equipped with basic (yet critical) equipment.
 - Leading growth will continue to be Ventilators, US machines, and EKG systems.

Basic Equipment Totals









							
	EKG machines	Patient monitors	X-ray machines	Anesthesia machines	Ventilators	Ultrasound machines	Infusion pumps
2020	136,072	90,649	25,020	32,157	109,006	22,540	360,241
YoY change	+12.5%	+1.1%	-2.1%	-1.2%	+9.6%	+38.6%	+8.7%

Specialized equipment will

expand through 2021 and onward

- Specialized equipment will experience slower growth in 2021.
 - Both Public and Private sectors under budget constraints will limit the short-term expansion of high-cost specialized equipment.
 - Cost-effective and higher-yield solutions will have better acceptance in the market.

Specialized Equipment Totals

								
	Tomography scanners	C-arms	Mammography scanners	Hemodialysis machines	MRI machines	Angiography machines	Gamma cameras	Radiotherapy equipment units
2020	5,488	4,586	3,472	20,069	2,012	1,800	563	439
YoY change	+9.5%	-1.9%	-5.5%	+8.7%	+10.8%	+10.2%	-1.6%	-3.5%

Top growth

equipment categories reflect capital investments

Medical equipment categories that grew the most in 2020 (select countries)*



Positron emission tomography

+49%

Argentina



Robotic surgery system

+52%

Brazil



Robotic surgery system

+100%

Central America



CT scanner

+73%

Chile



Robotic surgery systems

+60%

Colombia



Picture archiving & communication systems

+26%

Mexico



Radiology information systems

+19%

Peru

Technology Leaders

Argentina

#1 HOSPITAL ITALIANO DE BUENOS AIRES

Angiography machines	5
C-Arms	9
Magnetic resonance imaging (MRI) machines	4
Linear accelerators	0
Tomography scanners	4
Gamma cameras	2
Positron emission tomography (PET) systems	1
Radiotherapy machines	0
Total	25

Colombia

#1 FUNDACIÓN VALLE DEL LILI

Angiography machines	2
C-Arms	6
Magnetic resonance imaging (MRI) machines	3
Linear accelerators	3
Tomography scanners	4
Gamma cameras	2
Positron emission tomography (PET) systems	0
Radiotherapy machines	2
Robotic surgery systems	0
Total	22

Brazil

#1 HOSPITAL SIRIO LIBANÉS (SÃO PAULO)

Magnetic resonance imaging (MRI) machines	12
Tomography scanners	5
Gamma cameras	1
Positron emission tomography (PET) systems	2
Robotic surgery systems	2
Total	22

Chile

#1 HOSPITAL CLINICO REGIONAL DR. GUILLERMO GRANT BENAVENTE (CONCEPCIÓN)

Angiography machines	2
C-Arms	6
Magnetic resonance imaging (MRI) machines	1
Linear accelerators	3
Tomography scanners	4
Gamma cameras	2
Positron emission tomography (PET) systems	0
Radiotherapy machines	0
Robotic surgery systems	0
Total	18

Central America

#1 HOSPITAL MÉXICO (COSTA RICA)

Angiography machines	2
C-Arms	2
Magnetic resonance imaging (MRI) machines	0
Linear accelerators	4
Tomography scanners	1
Gamma cameras	2
Positron emission tomography (PET) systems	1
Radiotherapy machines	6
Total	18

Mexico

#1 HOSPITAL GENERAL DE MÉXICO DOCTOR EDUARDO LICEAGA (MEXICO CITY)

Angiography machines	4
C-Arms	7
Magnetic resonance imaging (MRI) machines	2
Linear accelerators	3
Tomography scanners	3
Gamma cameras	1
Positron emission tomography (PET) systems	0
Radiotherapy machines	2
Robotic surgery systems	0
Total	22

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Full report

Available

LEARN MORE

<https://medical-equipment-market-report-latin-america.com/>



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Medical Equipment Market Report: Latin America 2021

features more than 1,500 key data points that offer crucial insights to the marketing and sales teams of medical equipment/devices companies that are focused on Latin America.

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Let's

continue the conversation...



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