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. Our team of analysts and in-country experts interview physicians, surgeons, hospital administrative personnel and medical staff on a regular basis to understand how the pandemic, 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 third quarter of 2021. We conduct our analysis based on primary research with experts in cardiology, neurology, endocrinology, otolaryngology, gynecology, and other areas of general surgery. GHI tracks fluctuations in hospital investment decision, purchasing patterns and procedure volumes from quarter to quarter, Findings from the first quarter are available here: healthcare update for Brazil (May 2021).

"Due to the pandemic, many people did not want to continue their treatment and we had many cancellations of procedures for fear of a possible contagion, and more in our area that we are managing the main channels of contagion (mouth, nose and throat). The hospital offered promotional prices and discounts for procedures, unfortunately the result was not very positive."
— Otolaryngologist, mid-size private hospital, Vitória, Brazil (Oct 2021).

Key data on COVID in Brazil

- **COVID Deaths (official Count):** >596,000
- **Excess Deaths attributed to COVID*:** >650,000
- **Vaccination rollout** – population having received first vaccine shot – 75.9%
- **Vaccination rollout**** – Fully vaccinated population – 60%
- **Herd immunization speed** – estimated date for herd immunization: Dec 2021

Sources: Americas Market Intelligence, Council of the Americas, The Economist.

*Estimate for the period from Mar 1, 2020 to Sept 30, 2021 (updated Nov 24, 2021). While official death counts have been reported in many outlets, several sources indicate that these counts significantly underrepresent the true loss of life. One of these sources is The Economist, which has compared actual deaths to historic averages for the same period in prior years to estimate the excess number of deaths attributed to the virus.

**Estimate as of November 19, 2021.

Key data on patient health outcomes Brazil

- **Patient and procedure volumes** for elective procedures are expected to return to historic averages by Dec 2021, or Q1 0222 at the latest. Lags vary for elective procedures by specialty areas, with lesser lag in the most critical specialty areas: e.g., an estimated 20% for cardiovascular interventions vs. 15% in neurosurgery and 40% for otolaryngology.

"COVID-19 influenced our purchasing decisions because the products became more expensive. It became more difficult to authorize [elective] procedures, so we only bought or rented the products when the procedures were really going to be performed."
—Neurosurgeon specializing in Parkinson's disease, chronic pain, and spine surgery, Large private hospital, Brasilia, Brazil (Sept 2021).

- Hospitals are shifting budget allocations away from Covid and ICU care toward other procedures. Investments in airway management, ventilators and intensive care devices and consumables grew by over 50% during the pandemic. These budgets will drop in favor of investments in medical devices for elective surgeries in Q4 2021 and the first half of 2022.

"For medical device purchases I hope to see in a reasonably short period (6 months) a return to the normalcy of the times before the COVID-19 pandemic. Unfortunately, it is not a certainty, it is an opinion. The reason is mainly God, the familiarization of health professionals with the disease, the pace of science working for new discoveries, and the advancing vaccination of the population."
— Cardiovascular surgeon, mid-sized private hospital, São Paulo, Brazil (Sept 2021).

- Historic purchasing patterns for medical devices in various elective procedures will resume in early 2022 at larger hospitals, within the main urban centers of the country. However, smaller clinics and hospitals in rural, remote areas, are still suffering shortages, supply chain disruptions, and financial constraints..

"We are experiencing a very big crisis; our hospital is increasingly in debt and without resources. There is practically no help from the state and federal government."
—Intensive care surgeon, small private clinic, State of Minas Gerais, Brazil l (Sept 2021).

- B. Braun, Johnson & Johnson, and Medtronic are preferred premium brands for various surgical specialties; B. Braun stands out as a brand of preference in cardiovascular and neurosurgical procedures.
- Brazilian manufacturer Braile Biomedica has gained significant acceptance among cardiovascular and cardiac surgeons and is positioned as a leading brand in Brazil for oxygenators.

"One of the exclusive attributes are the kits developed by B. Braun, which have perfect quality and designs that are perfectly adapted to the procedures and the patient. I believe that B. Braun products offer an ideal fit for the surgeon's hand, offering a much more precise procedure."
—Neurosurgeon specializing in Parkinson's disease, chronic pain, and spine surgery, Large private hospital, Brasilia, Brazil (Sept 2021).

"Medtronic is very focused on human wellness and very focused on producing devices that reduce pain and prolong human life. I identify a lot with the brand, and I feel safe and precise in the use of the equipment."
—Pediatric Neurosurgeon, Large private hospital, Sâo Paulo, Brazil (Sept 2021).

"In addition to being our brand, I use Braile Biomedica products constantly. I get satisfactory results. Speaking of attributes: the cannulas have markings to facilitate insertion; hemoconcentration with a cylindrical polycarbonate body with a lateral connector for solute drainage; a membrane oxygenator made by an oxygenation chamber with a microporous membrane, being the best bovine pericardium patch, much safer and more reliable in my opinion."
—Interventional Cardiologist, mid-size private hospital, Fortaleza, Brazil (Sept 2021).

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.