

WEBINAR

Latin America's Medical Equipment Market 2022 Identifying key growth areas post-COVID

INTELLIGENCE.HEALTH



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2014

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

2015

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

2016

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

2017

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

2018

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

2019

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

2020

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

2021

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

Today's Speakers



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Today's Agenda

1 Latin America's Hospitals and Technology Adoption

2 2023 Market Outlook

3 Questions & Answers

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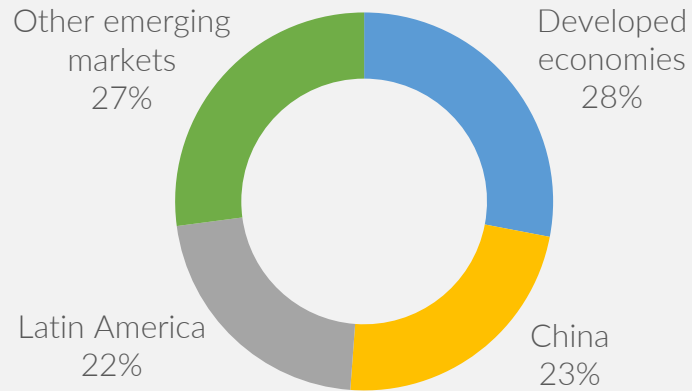
- 
- A 3D rendering of a white robotic hand with a glowing blue light emanating from the index finger. The hand is positioned in the center-left of the frame, reaching towards the right. The background is a light blue-grey gradient with abstract geometric patterns and glowing lines.
1. Latin America's Hospitals and Technology Adoption
 2. 2023 Market Outlook
 3. Questions & Answers

Latin America is home to nearly

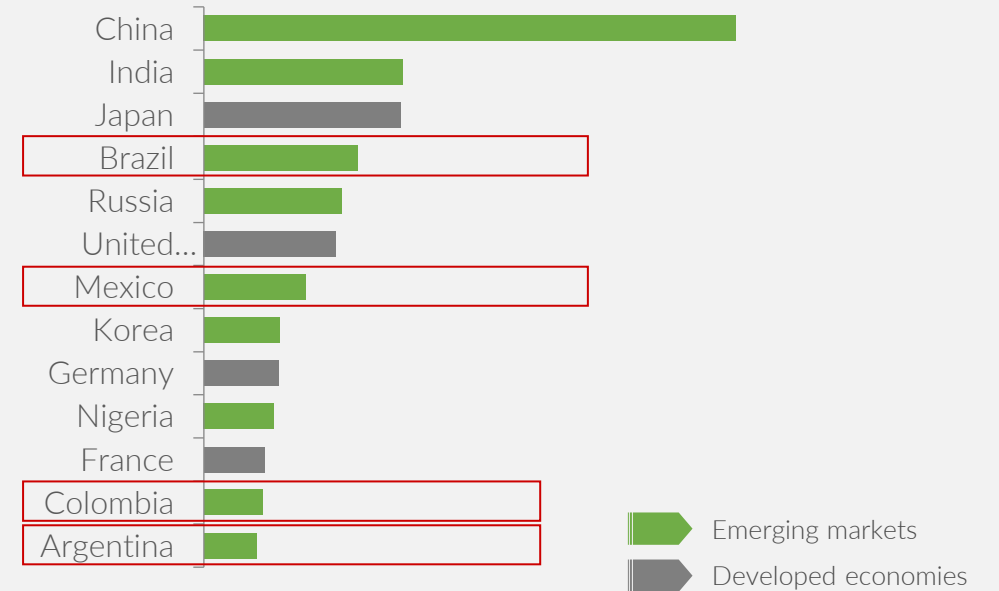
$\frac{1}{4}$ of the World's Hospitals



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 44 beds, compared to 162 beds in the USA and Europe.
 - Chile stands out across the region for having 106 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



21,951

Hospitals



1,224,837

Hospital Beds



53,363

Operating Rooms



14,714

Delivery Rooms

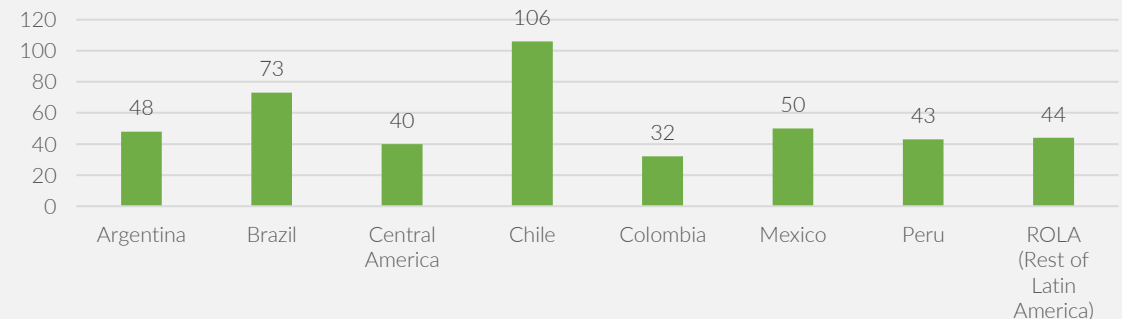


1,347,677

Doctors

Average number of beds per hospital

Average Number of Beds per Hospital



Smaller hospitals result in

lower equipment penetration

3 pillars are required to effectively run a healthcare system



Medical institutions – such as hospitals, clinics, laboratories, diagnostic centers, etc.



Equipment – such as capital equipment, devices, technologies, pharmaceuticals, etc.



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

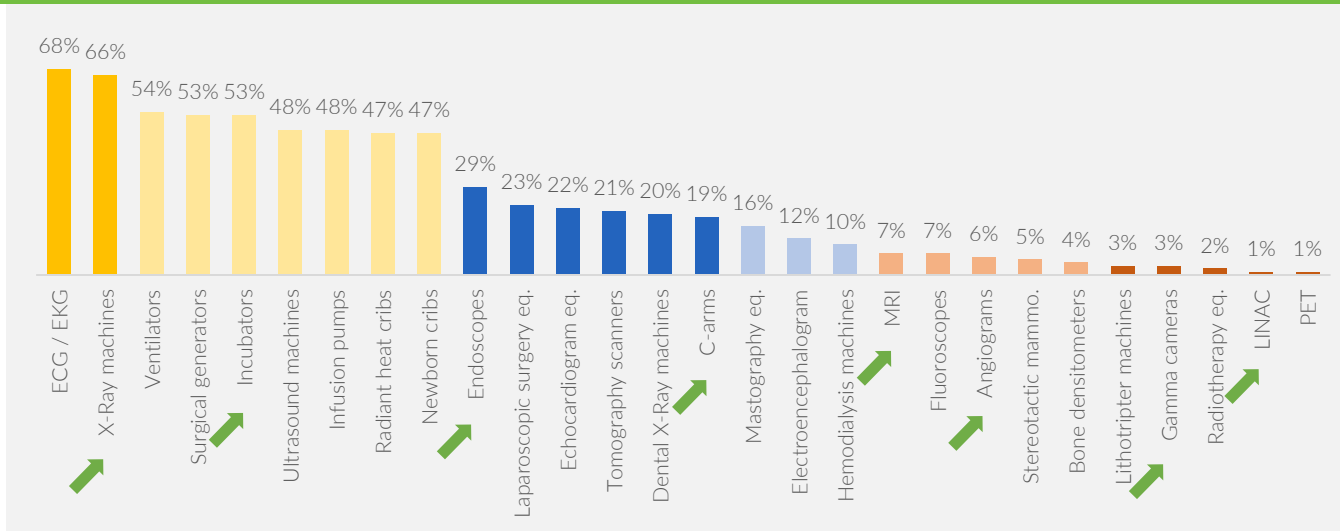


Staff

	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 (75% of hospitals have X-ray machines versus 4% 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%

1. Latin America's Hospitals and Technology Adoption
2. **2023 Market Outlook**
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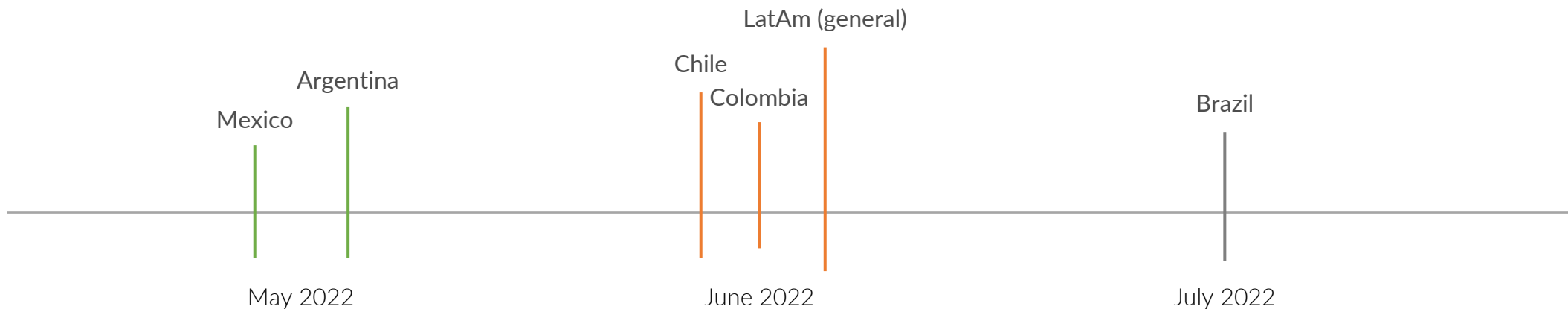
The return of elective procedures

Signals growth in demand for medical equipment and consumables

- Hospitals regained pre-pandemic procedure volumes in Q2 2022.
- Procedure volumes will be higher in 2022, relative to the pre-pandemic peak.

Timeline to return to Pre-Pandemic Procedure Level

Source: GHI analysis-based on LatAm Hospital Data

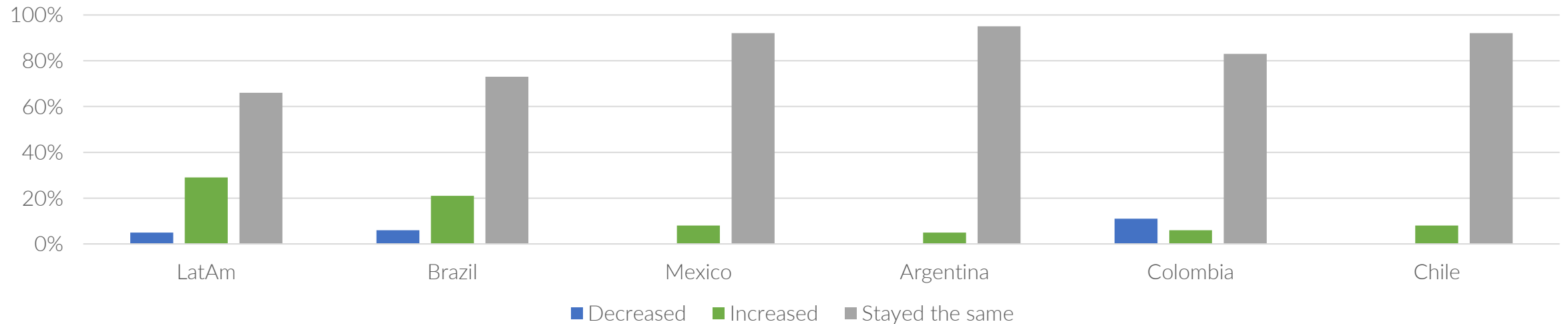


Spending on medical equipment and consumables

Has recovered and is set to grow in 2022-2023

- Hospitals replenished inventories following lean demand during the height for COVID in 2020-2021 COVID
- Growth is set to continue in 2023, as procedure volumes exceed pre-pandemic levels

Hospital Consumption of Consumables, March 2022 Vs. February 2022
(Source: GHI)



Telemedicine accelerated due to COVID

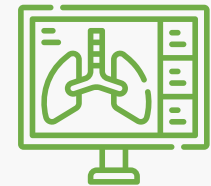
- Telemedicine grew across the board during the pandemic:
 - Demand for remote solutions with minimal touch points during the pandemic.
 - Need to connect with geographically dispersed patient populations
- Telemedicine gained ground for certain types of routine visits and follow-up appointments as well as analysis of lab results, tests, exams, and imaging diagnostics.
- The presence of Radiological Information Systems (RIS) and Pictures Archiving and Communication Systems (PACS) are leading indicators of the adoption of telemedicine at scale
- Chile is much further along than any other Latin American country in technological infrastructure, with a penetration of 19% for RIS and 46% of or PACS.

Growth trends in PACS and RIS



Picture archiving & communication system

+11%



Radiology information system

+62%

Top equipment categories

Reflect capital investments

Medical equipment categories that grew the most in 2021 (select countries)*



Mammography
Systems

+86%

Argentina



Position Emission
Tomography
Scanners

+70%

Brazil



Radiology
Information System

+112%

Central America



Radiology
Information System

+46%

Chile



Mammography
Systems

+51%

Colombia



Radiology
Information System

+60%

Mexico



Radiology
information system

+86%

Peru

Specialized equipment

Grew strongly in 2022

- Significant investments in capital-intensive equipment, after two years of slower growth.
- Cost-effective and higher-yield solutions will have better acceptance in the market.

Specilized Equipment Totals



Tomography scanners



C-arms



Mammography scanners



Hemodialysis machines



MRI machines



Angiography machines



Gamma cameras



Radiotherapy equipment units








2020	7,742	4,987	5,616	32,144	3,166	2,903	1,035	468
YoY change	+41%	+9%	+62%	+60%	+57%	+61%	84%	+7%

Basic equipment categories

Will expand through 2022 and onward

- Growth in basic equipment such as ventilators, infusion pumps and patient monitors reflect investments made during the pandemic.
- Growth will taper off for ventilators in 2023.

Basic Equipment Totals

							
	EKG machines	Patient monitors	X-ray machines	Anesthesia machines	Ventilators	Ultrasound machines	Infusion pumps
	158,098	106,079	28,404	35,047	148,846	16,259	508,381
YoY change	+16%	+17%	+13.5%	+9%	+36.5%	+40%	+41%

Technology Leaders

Argentina

#1 HOSPITAL ITALIANO DE BUENOS AIRES

Angiography machines	5
C-arms	12
Magnetic resonance imaging (MRI) machines	5
Linear accelerators	0
CT scanners	6
Gamma cameras	1
Positron emission tomography (PET) systems	1
Radiotherapy machines	0
Robotic surgery systems	3
Total	33

Colombia

#1 CLÍNICA LAS AMÉRICAS AUNA (MEDELLÍN)

Angiography machines	4
C-arms	5
Magnetic resonance imaging (MRI) machines	3
Linear accelerators	3
CT scanners	5
Gamma cameras	2
Positron emission tomography (PET) systems	2
Radiotherapy machines	1
Robotic surgery systems	0
Total	25

Brazil

#1 HOSPITAL ISRAELITA ALBERT EINSTEIN (SÃO PAULO)

Magnetic resonance imaging (MRI) machines	7
CT scanners	10
Gamma cameras	3
Positron emission tomography (PET) systems	2
Robotic surgery systems	3
Total	25

Chile

#1 HOSPITAL CARLOS VAN BUREN (VALPARAISO)

Angiography machines	1
C-arms	8
Magnetic resonance imaging (MRI) machines	1
Linear accelerators	2
CT scanners	2
Gamma cameras	0
Positron emission tomography (PET) systems	0
Radiotherapy machines	5
Robotic surgery systems	0
Total	19

Central America

#1 HOSPITAL METROPOLITANO (COSTA RICA)

Angiography machines	1
C-arms	3
Magnetic resonance imaging (MRI) machines	1
Linear accelerators	1
CT scanners	2
Gamma cameras	0
Positron emission tomography (PET) systems	1
Radiotherapy machines	2
Robotic surgery systems	1
Total	12

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
CT scanners	3
Gamma cameras	1
Positron emission tomography (PET) systems	0
Radiotherapy machines	2
Robotic surgery systems	0
Total	22

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Medical Equipment Market Report: Latin America 2022

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
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