

LatAm Healthcare Pulse:

Key data and perspectives on patient care

LATAM

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GHI has been monitoring health care trends in Latin America throughout the COVID-19 crisis and will continue to do so post-pandemic. 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 on Latin America's main markets, including Argentina, Brazil, Chile, and Colombia in the first and second quarters of 2022. We conducted our analysis based on primary research with surgeons and head nurses. GHI's findings track fluctuations in hospital investment decisions, purchasing patterns, and procedure volumes from quarter to quarter.

Demand for medical equipment and pricing considerations

- During 2020, COVID impacted the volume of procedures between 10% to 60%, depending on the type of procedure. Procedure volumes have since returned to pre-COVID levels.
- GHI tracks a wide array of elective and non-elective procedures to understand changes in demand for consumables, surgical equipment, and medical devices.
- Minimally invasive procedures are on the rise, whereas open or conventional surgeries are stagnant or in decline.
- Procedures include general surgeries, gynecological surgeries, bariatric surgeries, gastroenterological procedures, laparoscopic surgeries, and other general surgeries (see callout box).

"Procedures performed by laparoscopy are growing because they are less invasive, and the patient recovers quickly".

—Medical Quality, private hospital, Colombia (April 2022)

Interviewed surgeons include specialists in:

- Laparoscopic hernia surgeries and video laparoscopic hiatal hernioplasty.
- Coloproctological surgery, colonoscopy, endoscopy, video laparoscopic colectomy, recto sigmoidoscopy with polypectomy, fistulectomy or anal fistulotomy.
- General abdominal surgeries, abdominal cancer, colectomy, laparotomy, appendectomy, correction of abdominal adhesions, surgery for the treatment of peptic ulcer and cholecystectomy.
- Proctosigmoidectomy, hemorrhoid surgery, surgical treatment of rectovaginal fistula, anal sphincteroplasty, surgical treatment of prolapse of the anal mucosa and excision of anal lesions.
- Bariatric surgeries, intragastric balloon installation, colectomies, resection of the small intestine, anti-reflux surgeries and digestive endoscopy.
- Traumatology and trauma procedures.

"Compared to the pandemic, all procedures are increasing. Once the confinement was over, people began moving around again and they are more at risk of accidents".

—Chief of Emergency Trauma, private clinic, Chile (July 2022)

Product selection and brand preference considerations

- Brands that stand out as the preferred choice for surgeons for general surgery and disposable, reusable, and durable devices include:
 - **BBraun:** irrigation and aspiration systems, trocars, meshes, scissors, electro-scalpels, laparoscopic towers, laparoscopic electrodes; abdominal, rectal, vaginal, hepatic, and laparoscopic retractors; absorbable suture threads; surgical glue for skin sutures, suture needles.
 - **Johnson & Johnson brands, including Ethicon:** suture anchors, dissection scissors, laparoscope, trocar for laparoscopy, laparoscopic forceps; absorbable and non-absorbable suture threads; laparoscopy kit, scalpel, titanium clips.
 - **Endoflex:** polyp collectors, basket for endoscopic extraction of kidneys and gallstones; multi-band endoscopic elastic ligation, biliary sphincterotomy, cytology brushes.
 - **Medtronic brands:** pancreatic, esophageal, and biliary stents; sutures; conventional laparoscopy forceps, cold scalpel, conventional forceps.
 - **Other preferred brands include Protec:** surgical electric aspirator, collection bottle for aspirators, oxygen mask for tracheostomy, anesthesia circuits; Limmer: CO2 laser; Sonoscape: video gastroscopes and colonoscopes; Welch Allyn: duodenoscope, sigmoidoscopes, and recto scopes.
 - Surveyed surgeons also mentioned brands such as **Richard Wolf, Boston Scientific, Biotronik, Mediform, BD, Continental, Sovereign, Tagum, Swann-and Morton.**

- Some examples of devices that get sterilized and reused for general surgery are laparotomy equipment and endoscopes. Other critical materials include first-line instruments such as scissors, forceps, trays, spreaders, and all stainless-steel instruments used in the operating room.
- Chinese brands have made inroads in sales of medical devices and consumables. Although considered of lower quality, they are competitive from a pricing standpoint. Physicians, however, are often reluctant to adopt them citing patient safety concerns.

"For Fujifilm, the images have good resolution, and the endoscope has a good grip and can be handled without difficulty".

—Gastroenterology, private clinic, Bogotá, Colombia (July 2022)

"Super Max, Mediform, BD, Tagum, Swann-Morton, and Continental are recognized brands endorsed worldwide. They are the brands that have the largest presence and equipment necessary for day-to-day surgeries".

—Chief of Emergency Trauma, private clinic, Chile (July 2022)

"Medtronic's equipment is superior in technology and differentiated design that offers greater precision. In my opinion, they have several unique attributes: Medtronic's surgical motors have greater power and speed, they also have nematic and electrical components, and are very easy to guide. The plate drill is of excellent quality: it brings firmness and greater looseness than other brands".

—Orthopedic surgeon, private hospital, São Paulo Brazil (July 2022)

"There are Chinese products coming onto the market. I do not know how good they are as I have not used them, but I think they have lower prices than other equipment".

—Chief of Emergency Trauma, private clinic, Chile (July 2022)

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.