

# LatAm Healthcare Pulse:

## Key data and perspectives on **patient care**

## ARGENTINA

September 2022

GHI has been monitoring healthcare 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 Argentina 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. Findings from earlier healthcare pulse reports are available here: [healthcare update for Argentina \(January 2022\)](#).

## 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.
- Procedures include general surgeries, gynecological surgeries, bariatric surgeries, gastroenterological procedures, laparoscopic surgeries, and other general surgeries for vesicles, colon, hernias, umbilical hernia, and hemorrhoids (see callout box).

### Interviewed surgeons include specialists in:

- Open abdominal wall hernia surgery, emergency hysterectomy, gastrectomy, liver hydatid cyst removal, ulcer repair surgery, achalasia, laparotomy, partial appendectomy, appendectomy, gallbladder surgery, emergency salpingo-oophorectomy and gastric bypass surgery,
- Local removal or destruction of skin and subcutaneous tissue or lesion.
- Proctological surgeries, coloproctology, cholecystectomy, cystectomy, eventration, bariatric surgery, digestive surgery, endometriosis, and hepatobiliary surgery.
- Other types of laparoscopic surgery and video laparoscopic surgery.

"Laparoscopic surgery, in general, is growing, but in a public hospital we have limitations of supplies from the government and that makes the growth less noticeable".

—General Surgeon, public hospital, Argentina (April 2022)

"In the near future, I see that the adoption of robotic systems will increase in some countries of the world, but in Argentina, I think that will happen in the distant future. But yes, it is already a reality in some countries and yes, I think it will be a reality worldwide".

—General Surgeon, public hospital, Argentina (April 2022)

- In Argentina, on average 50% of the market for general surgery products and devices is private and 50% is public.
- In the private sector, surveyed products are 30% more expensive than in the public sector. Prices have been increasing and are not expected to return to pre-COVID levels because of strong inflation and the loss of value of the peso against the U.S. dollar. Moreover, there have been price fluctuations due to supply chain disruptions. Price increases relative to 2020 vary widely by product, from as little as 15% to as much as 100%.
- The average markup by distributors of medical products varies from 20 to 40%.

"Supply has been affected, partly because of the pandemic and partly due to costs. Everything is going up and these products are priced in dollars".

—Purchasing Manager, private clinic, Argentina (April 2022)

"Due to the pandemic, many surgeries were halted, but now they are being performed again and there is slightly more demand".

—OR Manager, public hospital, Argentina (April 2022)

## Product selection and brand preference considerations

- Foreign brands have a larger share of the market than national manufacturers. The leading brands in the market are Johnson & Johnson, B.Braun, and Covidien. Top brand attributes include quality, warranty, and price.
- Prominent national brands include FAICO Surgical Instruments, Gama, Bifarma, Propato, Pam Argentina, Surgiwell, Pajunk, Ecleris, Necod, Argentine Surgery and Tecnoimagen.

- Brands that stand out as the preferred choice for surgeons for general surgery disposable, reusable, and durable devices include:
  - Johnson & Johnson brands, including Ethicon: mechanical sutures, linear sutures, circular sutures, meshes, laparoscopic mesh fixation systems; laparoscopic forceps and laparoscopes.
  - Medtronic Brands, including Covidien: mechanical sutures, linear sutures, circular sutures, meshes, laparoscopic mesh fixation systems.
  - Stryker: laparoscopic towers, nylon and linen sutures, conventional laparoscopic forceps; meshes, trocars, staplers, electrocautery, anesthesia equipment, scissors.
  - Endoflex: biliary access sheath, sphincterotomy for biliary sphincterotomy, multiband endoscopic elastic ligation, gastrointestinal and biliary cytology brush, polyps collector, tether; pancreatic, biliary, gastrointestinal, esophageal, and pyloric stents.
  - B.Braun : laparoscopic forceps and laparoscope, abdominal hernia prosthesis, laparoscopic surgery extraction bag, liver retractors, laparoscopic retractors; surgical dermal suture stapler, laparoscopic clip applicator.
  - Wellead: breathing circuit, oral and nasal endotracheal tube, breathing circuit heat exchanger, gastrostomy tube, wound drainage tanks.
  - Other preferred brands include Life Like: intestine anatomical model; Neomedic: tracheostomy tube; electrosurgical equipment, dissectors, aspirator, needles, needle holders (also from Fengh, Purple, Tagumesh, Kolpen, Karl Storz); intestinal clamp forceps, croce forceps, forceps, irrigation and suction systems, cable and tube systems (also from Purple, Karl Storz, Mindray, Valley Lab Force).
  - Surgeons also mentioned Super Max, Mediform, BD, Continental, Farmax, Soverane, Tagum, Swann-Morton as preferred brands.
- Some examples of devices that get sterilized and reused for general surgery are laparoscopic forceps, scissors, forceps, retractors, cannulas, electric scalpels, safety scalpels, laparoscopes, endoscopes, filters, Co2 insufflators, and clip applicators.
- Some models of surgical staplers are also reused. Surgeons mentioned the B.Braun dermal suture stapler, which is disposable, and the linear stapler, which is reusable.

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](mailto: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.