

Unstoppable Forces Impacting MedTech

And what that means for your sales

August 6, 2024



MedTech Outlook: Latin America 2024

Key data for medical equipment professionals

Today's agenda

- 1 Unpacking the unstoppable forces impacting healthcare
- 2 Latin America's hospital landscape & Technology leaders
- 3 Winning strategies

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Today's speakers



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Healthcare intelligence that uncovers **opportunities** and maps the **competition** in emerging markets.

Global Health Intelligence is the world leader in assessing:

- Hospital infrastructure & opportunities
- Market size & Market share
- Surgical procedure volumes
- Pricing analysis
- Patient journey
- Competitive analysis
- Research projects tailored to your needs



HOSPISCOPE SHARESCOPE SURGISCOPE PRICESCOPE IN-SCOPE

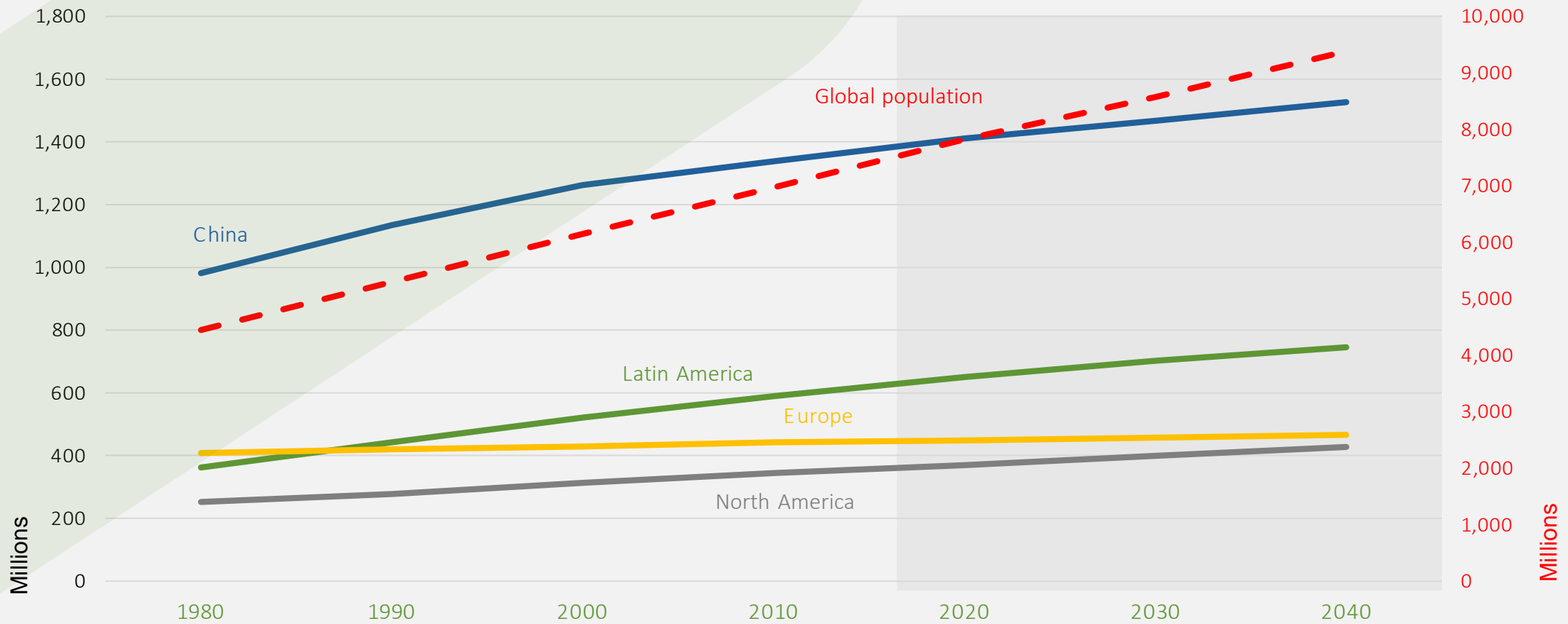


Unpacking the **unstoppable forces** impacting healthcare



Global population will surpass 9 B

LatAm is one of the fastest growing regions



Stages of life expenditures are shifting

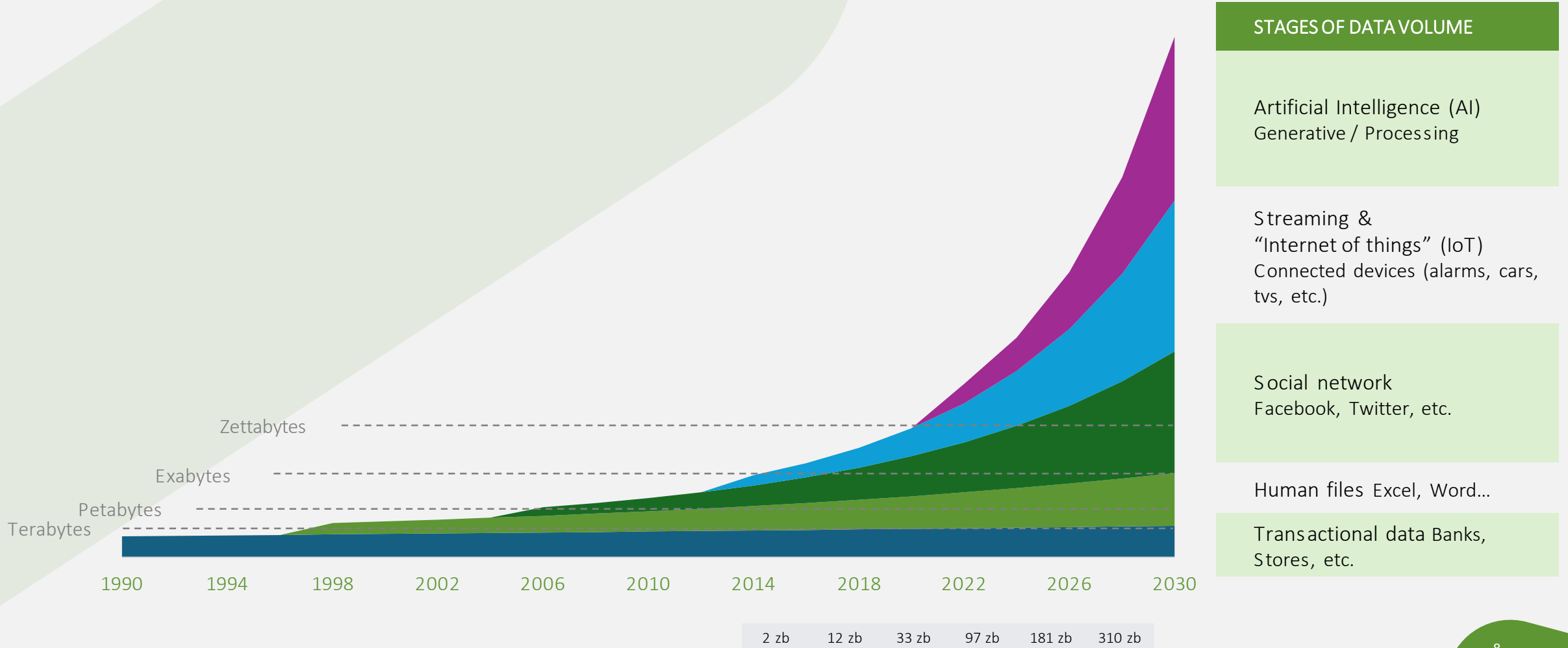
Latin America is getting older, rapidly. This will drive healthcare demand over the next 2 decades.



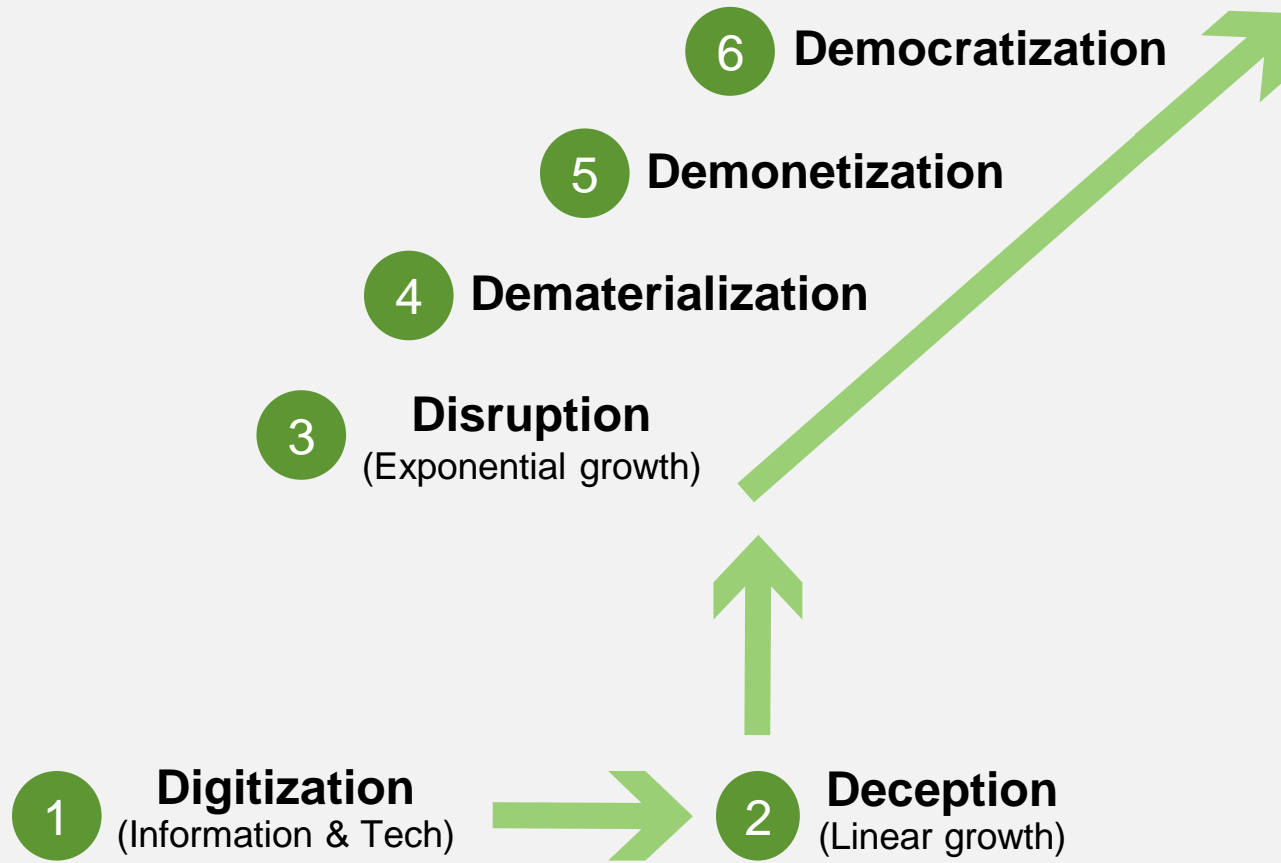
| Life stage | Babies | Children | Young adults | Adults | Seniors |
|-----------------------------|--------|----------|--------------|--------|---------|
| Age group | 0-10 | 11-18 | 19-40 | 41-65 | 65+ |
| Demographic shift 2010-2020 | -7.5% | -5.9% | 0.6% | 17% | 51% |

- Decrease in school children, children clothing, caregiving, toys, baby formulas, teen products, etc.
- Increased personal financial planning & savings, investment, wellness health, hospital care, old age homes, end life expenditures, etc.

Exponential increase of content creation









The healthcare sector is on the verge of an AI disruption



| INDUSTRY | BEFORE | NOW |
|-------------|---------------|----------------------|
| Music | CDs | Spotify, Apple Music |
| Television | Cable | Netflix, Amazon |
| Tourism | Travel agency | Expedia |
| Transport | Taxis | Uber |
| Photography | 35 mm | Digital, telephone |
| Telephone | Telephone | Facetime > Teams |
| Law | Attorney | LegalZoom |
| Knowledge | Encyclopedia | Wikipedia, Google |
| Education | Universities | Coursera |
| Health | ... | ... |

AI has the potential to improve **healthcare efficiency**

| | |
|--|--|
|  INDUSTRY PLAYERS | <ul style="list-style-type: none">▪ Faster product innovation▪ Faster go-to-market (testing, clinical research, etc.)▪ Improved outcomes |
|  PROVIDERS | <ul style="list-style-type: none">▪ Faster diagnostics▪ Greater operational efficiency▪ Improved outcomes▪ Better back-end platforms |
|  PHYSICIANS | <ul style="list-style-type: none">▪ Access to support apps▪ Increased accuracy (fewer errors)▪ Improved patient communication |
|  PAYERS | <ul style="list-style-type: none">▪ Access to front-end software▪ Access to back-end platforms▪ Greater efficiency and cost reductions |
|  PATIENTS | <ul style="list-style-type: none">▪ Faster access to care▪ Continual care support (apps, reminders, interactions, etc.)▪ Improved outcomes |
|  POLICYMAKERS | <ul style="list-style-type: none">▪ Increased access to care▪ Lower overall cost of healthcare |

Unpacking the **unstoppable forces**

DEMOGRAPHICS

- Population growth
- Latin Americas is the fastest ageing region in the world
- 50+ age group growing fastest
- Increase in demand of health services

TECHNOLOGY

- 6 D's of Disruption
- May be in the deception phase of Disruption

ARTIFICIAL / ASSISTED INTELLIGENCE

- Content generation is accelerating with AI
 - Can be used to improve outcomes, faster
 - Opportunity to improve the patient experience
-

All of the information presented here today (and more) is available in our **MedTech Outlook**

[LEARN MORE](https://medical-equipment-market-report-latin-america.com/)

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



MedTech Outlook: Latin America 2024

Key data for medical equipment professionals

Poll question #1

Which category of medical equipment do you need data for?

- Imaging equipment
- Diagnostic equipment
- Patient monitoring systems
- Oncology equipment & systems
- Advanced surgical equipment
- Other



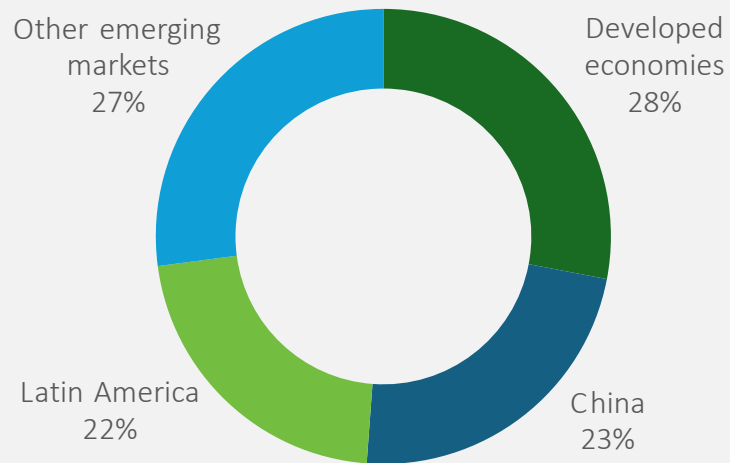
Hospital landscape & Technology leaders



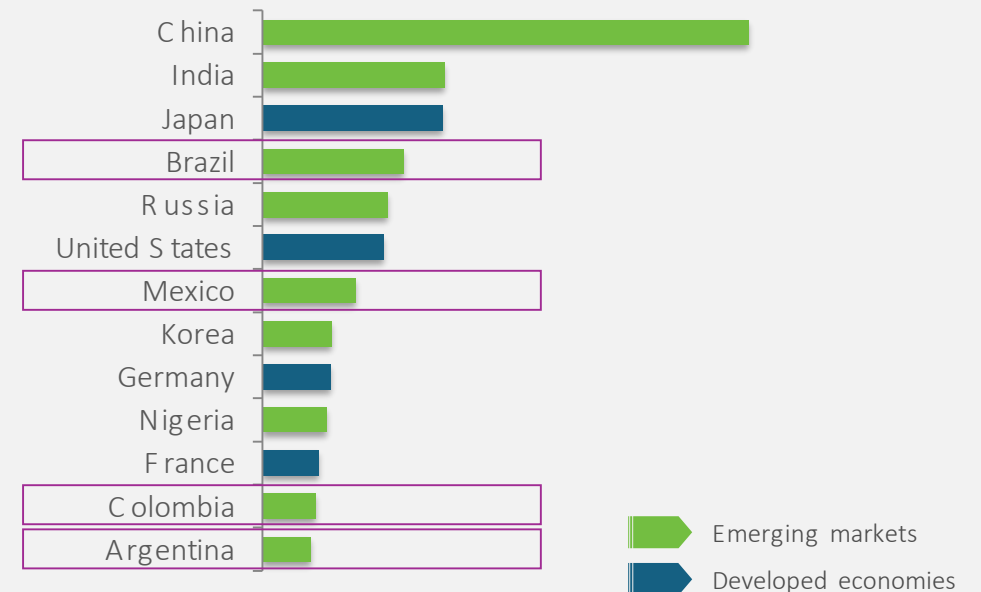
Latin America is home to over 1/5 of the world's hospitals



Number of Hospitals by Economy



Number of Hospitals by Country

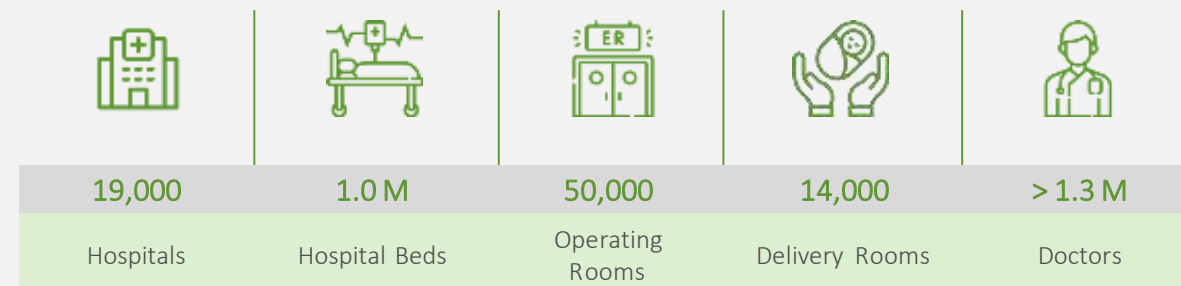


- There are 3x as many hospitals in emerging markets as there are in developed economies.
- Out of the top 10 emerging markets, 4 are in Latin America.

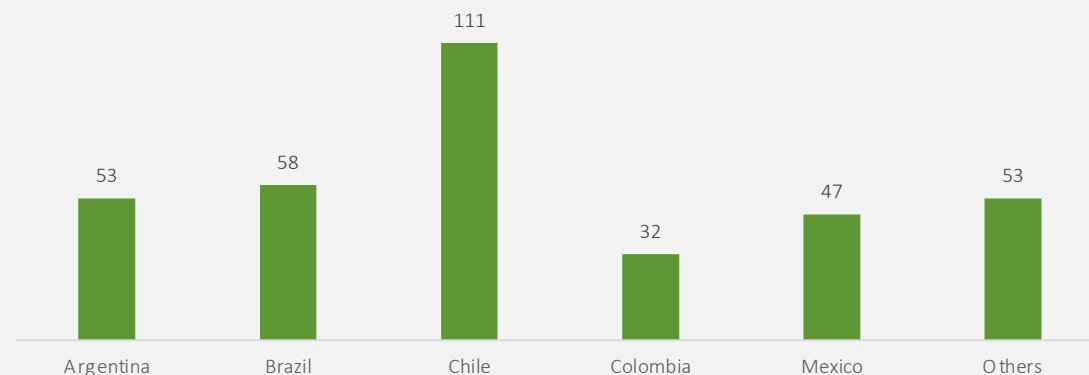
The structure of hospitals results in more, smaller purchases, limiting tech expansion

- The LatAm hospital market is more fragmented, with many, smaller players.
 - The average Latin American hospital has 51 beds, compared to 162 beds in the USA and Europe.
- There are fewer hospitals with the capacity to develop centers of expertise (based on size / throughput), with more hospitals tending to primary care.
- With more, smaller institutions, logistics (and the use of distributors) becomes a critical success factor.

LatAm hospital infrastructure totals

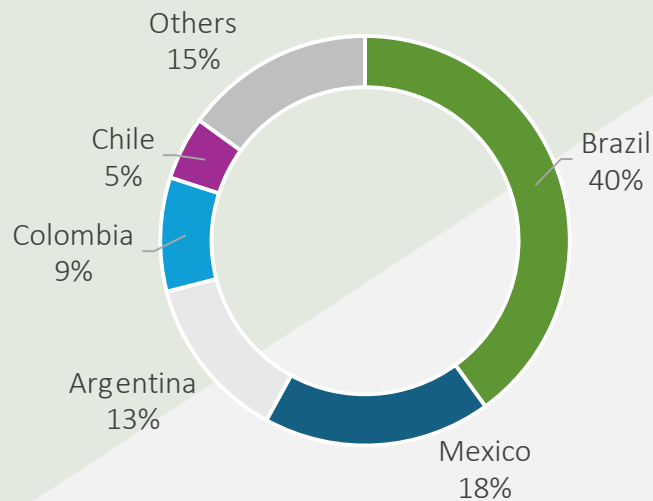


Average number of beds per hospital: 51

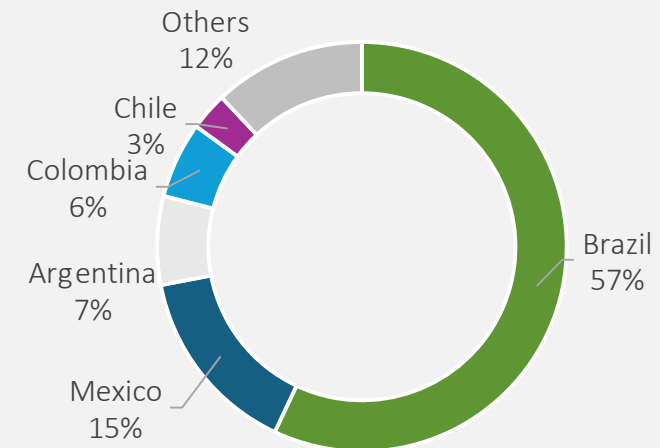


Countries have vastly different HC systems and drivers,
growth strategies need to be **adapted to each market**

Distribution of hospital beds

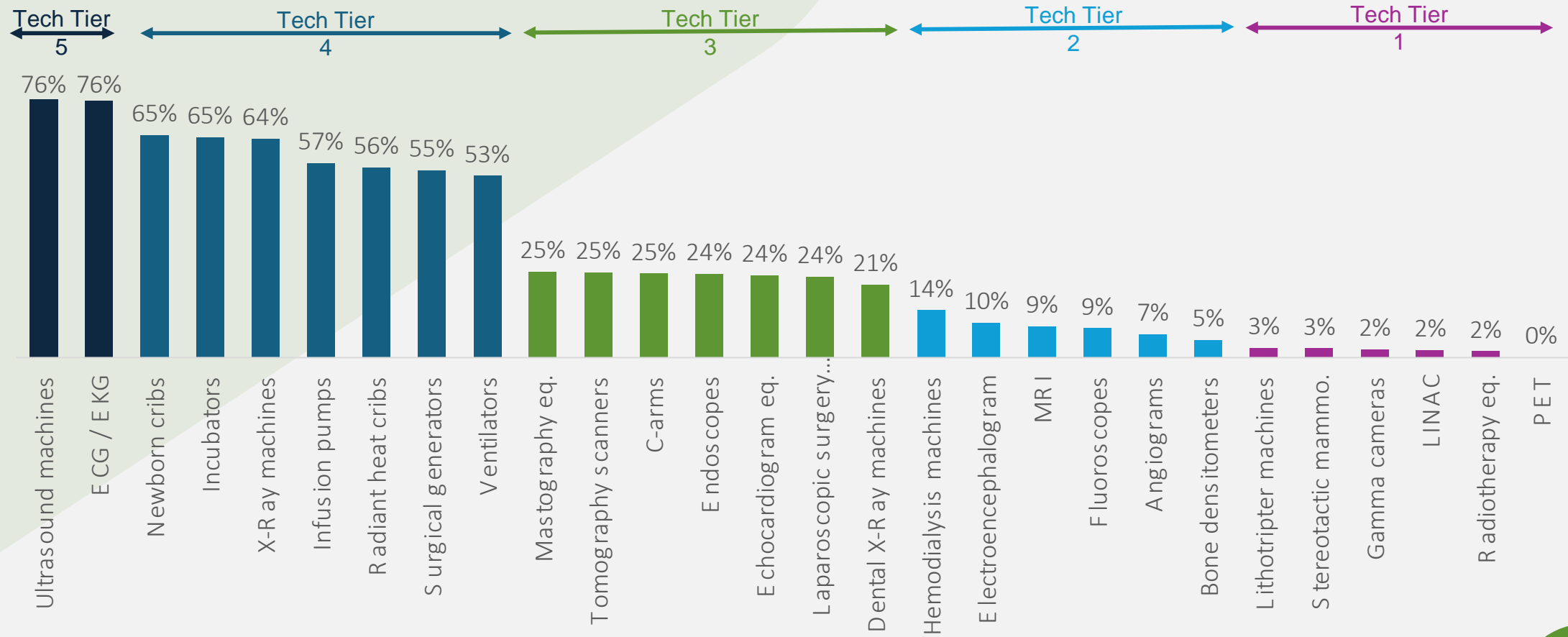


Distribution of operating rooms



- Targeting, Segmentation, Approach and Messaging need to be crafted based on local needs.
 - Understanding the nuances and segmentation between Public and Private sector on a Country Level is critical for success in the region.

Hospitals with higher technology equipment tend to be larger and with a higher degree of specialization

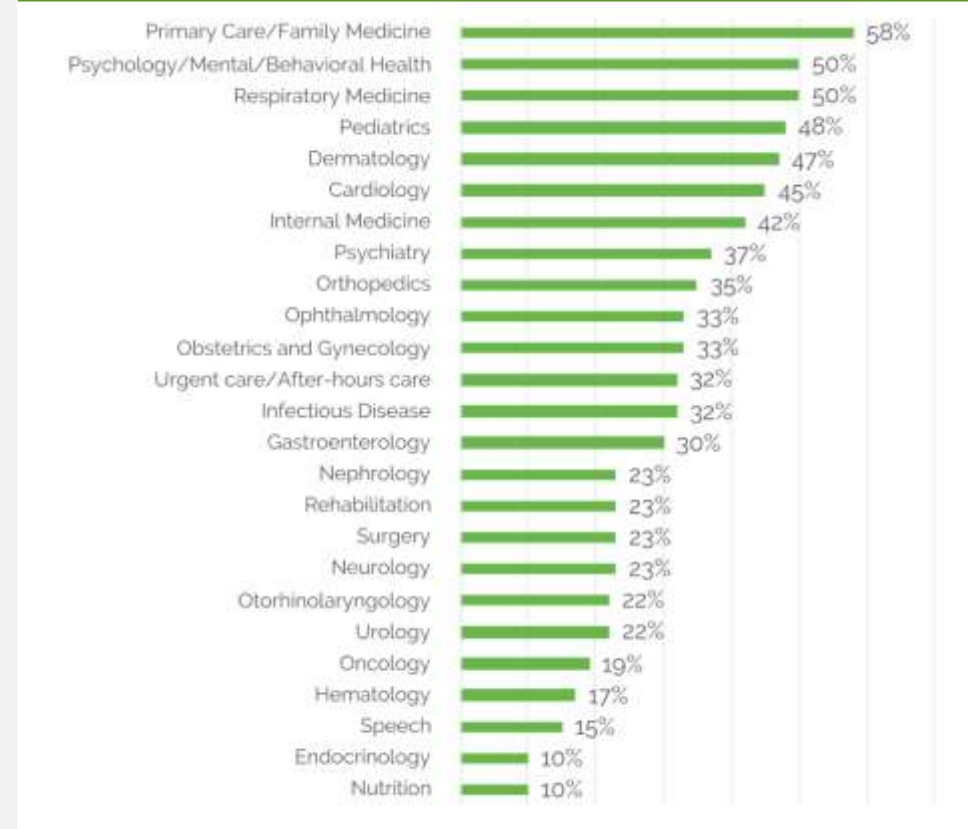


Some technologies are **outpacing the market** in regard to installed base and penetration

Market out-performers

| Equipment | 2023 Growth of installed base |
|--|-------------------------------|
| Endoscopy towers | 13.7% |
| Electroencephalogram machines | 11.0% |
| Laparoscopic surgery equipment | 10.5% |
| Sterilization machines - low temperature | 10.4% |
| Endoscopes | 10.2% |
| Surgical generators - advanced energy | 9.4% |
| PET/CT systems | 8.8% |
| Hemodialysis machines | 8.6% |
| Infusion pumps | 5.7% |
| MRI | 5.7% |
| Gamma cameras | 5.6% |

Telehealth penetration by specialty



Technology leaders

| | Argentina | Brazil | Chile | Colombia | Mexico |
|----|--|---|---|--|--|
| 1 | H. Italiano de Buenos Aires | H. Das Clinicas de Faculdade de Medicina da Universidade de São Paulo | Complejo Hospitalario Dr. Sotero del Rio | Fundación Valle de Lili | H. Universitario Dr. José Eleuterio González |
| 2 | H. Universitario Austral | Hospital Israelita Albert Einstein | H. Barros Luco Trudeau | Clínica Las Américas Auna | Centro Médico Nacional 20 de Noviembre |
| 3 | H. Alemán | AC Camargo Câncer Center | H. Clínico Regional Dr. Guillermo Grant Benavente | Organización Clínica General del Norte | H. Médica Sur |
| 4 | H. Italiano de San Justo Agustín Rocca | Santa Casa de Misericórdia de Porto Alegre | H. Carlos Van Buren | H. Pablo Tobón Uribe | H. Juárez de México |
| 5 | H. Italiano La Plata | H. Beneficência Portuguesa | H. Base Valdivia | Hospital Militar Central | UMA E H. de Cardiología 34 IMSS |
| 6 | H. El Cruce Dr. Néstor Carlos Kirchner | H. Sírio Libanês | H. Dr. Cesar Garavagno Burotto | Instituto Nacional de Cancerología | H. General de México Dr. Eduardo Liceaga |
| 7 | Sanatorio Güemes | H. Moinhos de Vento | H. San Juan de Dios de Santiago | H. Universitario Mayor Méderi | H. De Traumatología Magdalena Salinas |
| 8 | Sanatorio 9 de Julio | Instituto do Coração | H. De Puerto Montt Dr. Eduardo Schutz Schroeder | H. San Vicente Fundación | Instituto Nacional de Cardiología Ignacio Chávez |
| 9 | H. De Clínicas José de San Martín | H. Do Servidor Público Estadual Francisco Morato de Oliveira | H. Las Higueras de Talcahuano | H. Alma Mater Sede Principal | H. Civil de Guadalajara Fray Antonio Alcalde |
| 10 | Sanatorio del Salvador Privado | Instituto do Câncer | Complejo Hospitalario San José | Clínica el Rosario Sede Centro | H. Español |

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- Tracking market size & market share
- Hospital infrastructure & opportunities
- Surgical procedure volumes
- Research projects tailored to your needs
- Patient journey
- KOLs / DOLs mapping & interviews



Poll question #2

Which of the following stakeholders do you think will most benefit from technological advancements in the coming 5 years?

- Policymakers
- Healthcare Providers
- Payors
- Physicians
- Patients

Winning strategies



6 winning strategies to help you succeed in Latin America

From demand to supply

- Cost constraints to prevail – “Good enough” mentality
- Focus on relationship-building
- Increased competition
- Focus on client segmentation

Thinking beyond the product attributes

- Demonstrate effectiveness through clinical evidence

Portfolio v Pricing

- Pricing is key
- But so is having a complementary and diversified portfolio

Setting the standard

- Grow sales by growing the pie
- Advanced training programs to drive adoption

Winning tenders

- ~70% of procedures are conducted through the Public sector
- Dedicated teams to analyze and participate in bids

Disruptive strategies

- Growing participation of Asian products
- Some offer adaptive solutions in terms of price and technology

Poll question #3

Would you be interested in a 30-minute free consultation with our energy team to discuss your Latin American business strategy?

- Yes
- No thanks
- Not at the moment, but contact me in Q4 2024 to discuss

Q&A



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Let's continue the conversation



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