



# The Impact of Coronavirus on Latin America's Healthcare System – Crisis Vs. Opportunity

Webinar, Latin America



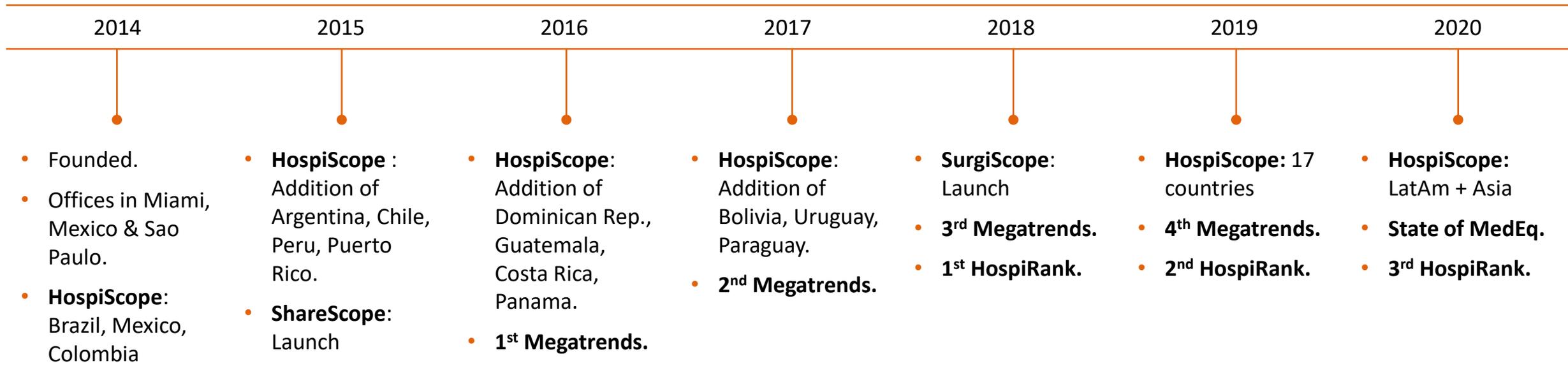
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Today's guests

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# Today's speakers



**Mariana Romero Roy**  
Director of Business Dev. & Intel  
Global Health Intelligence  
[mariana@intelligence.health](mailto:mariana@intelligence.health)



**Agustin Zabulanes**  
Country Director - Mexico  
Boston Scientific  
[agustin.zabulanes@bsci.com](mailto:agustin.zabulanes@bsci.com)



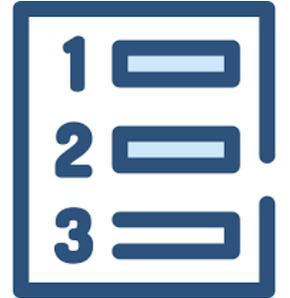
**Guillaume Corpart**  
Founder & CEO  
Global Health Intelligence  
[gc@intelligence.health](mailto:gc@intelligence.health)



**Dr. Benjamín Villaseñor, MD**  
Innovation Director  
Grupo Diagnóstico Médico Proa  
[benjamin.villasenor@proa.com.mx](mailto:benjamin.villasenor@proa.com.mx)

# Agenda

- 1. Latin America in the Global Context**
- 2. Foreseeable impact of COVID-19**
- 3. Crisis & Opportunity**
- 4. Questions & Answers**



## Poll Question

**In your opinion, how ready is Latin America to deal with a pandemic such as COVID-19?**

- Totally unprepared
- Somewhat unprepared
- Somewhat prepared
- Very prepared

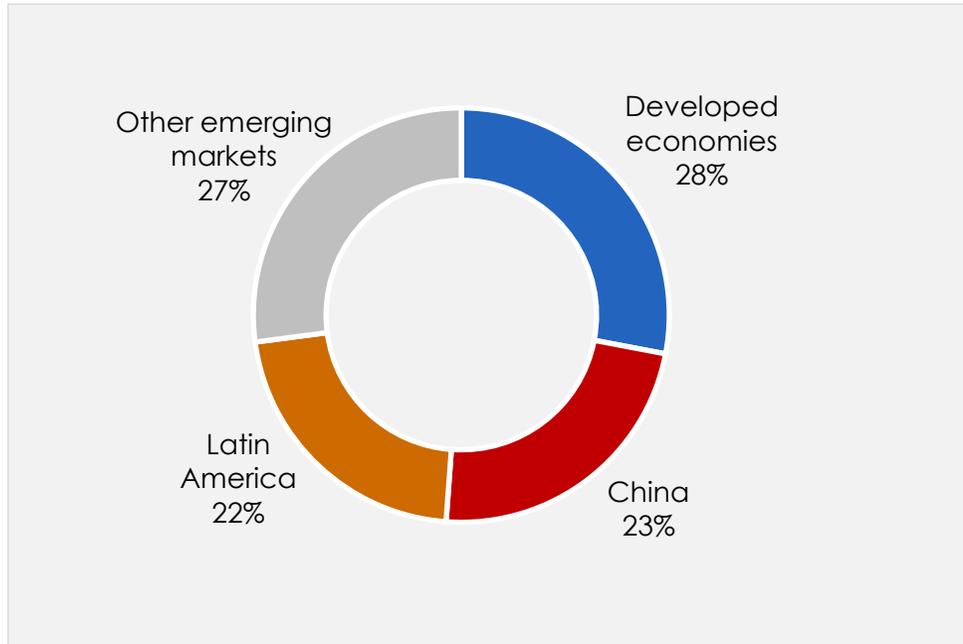


# Latin America in the Global Context

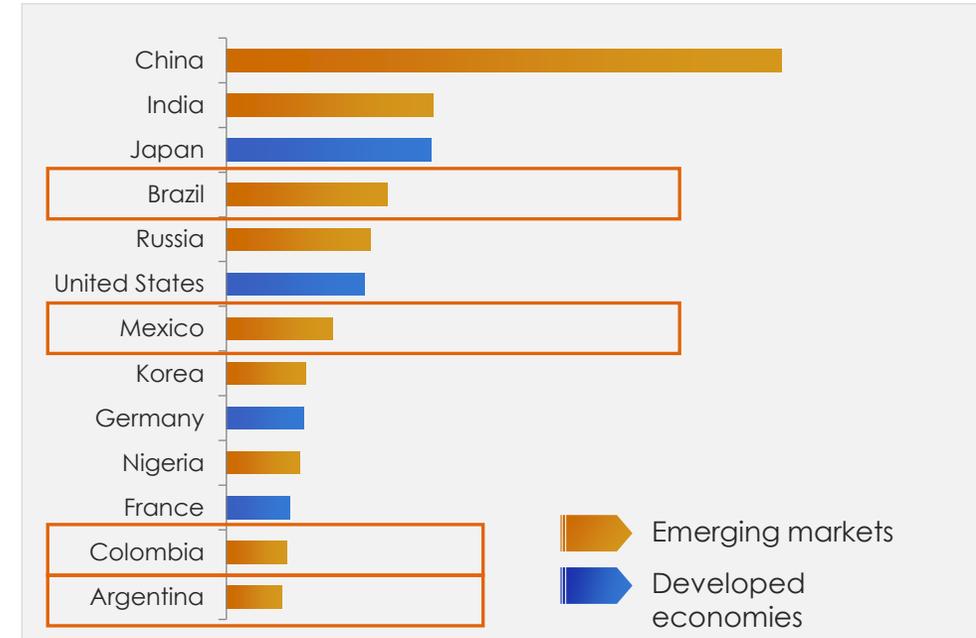
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# Latin America is home to nearly 1/4 of the world's hospitals

## Number of Hospitals by Economy



## Number of Hospitals by Country

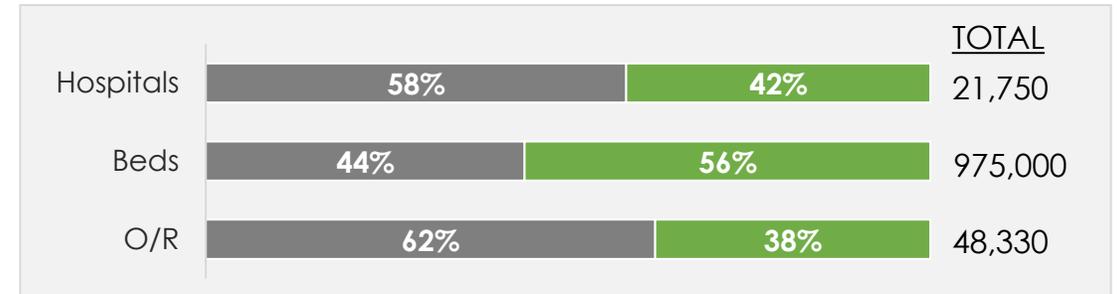


- There are 3x as many hospitals in emerging markets as there are in developed economies.
- Out of the top 10 emerging markets, 4 are in Latin America.

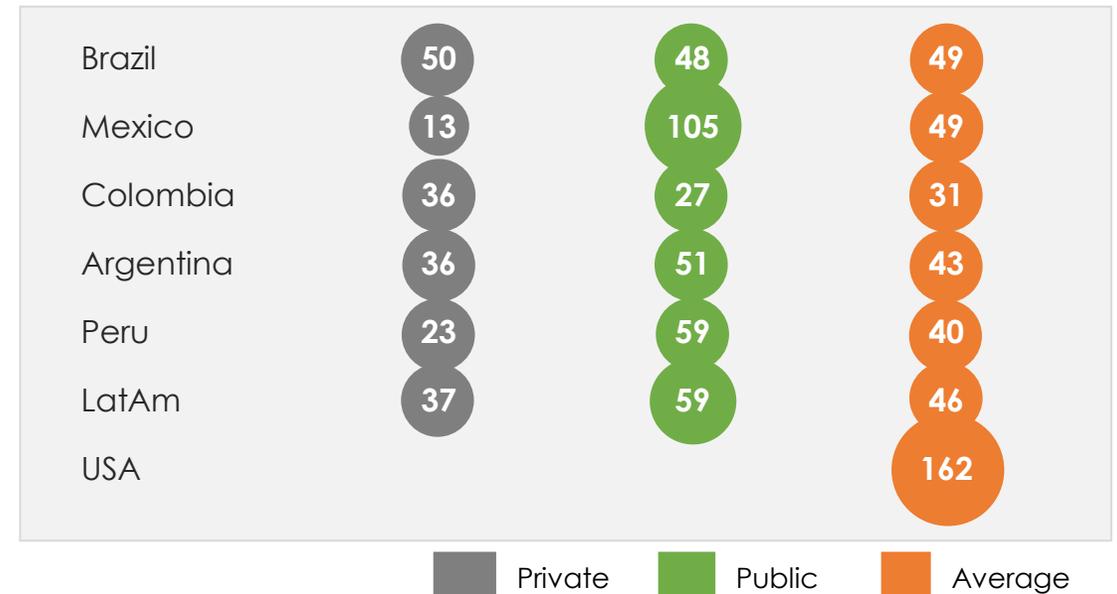
# The structure of hospitals will limit ramp-up speed and capabilities

- Hospitals across Latin America are on average 3.5x smaller than those of the US.
- There is a vast size difference between between Public and Private institutions.

## Infrastructure Breakdown in LAC



## Average hospital size (# of beds)

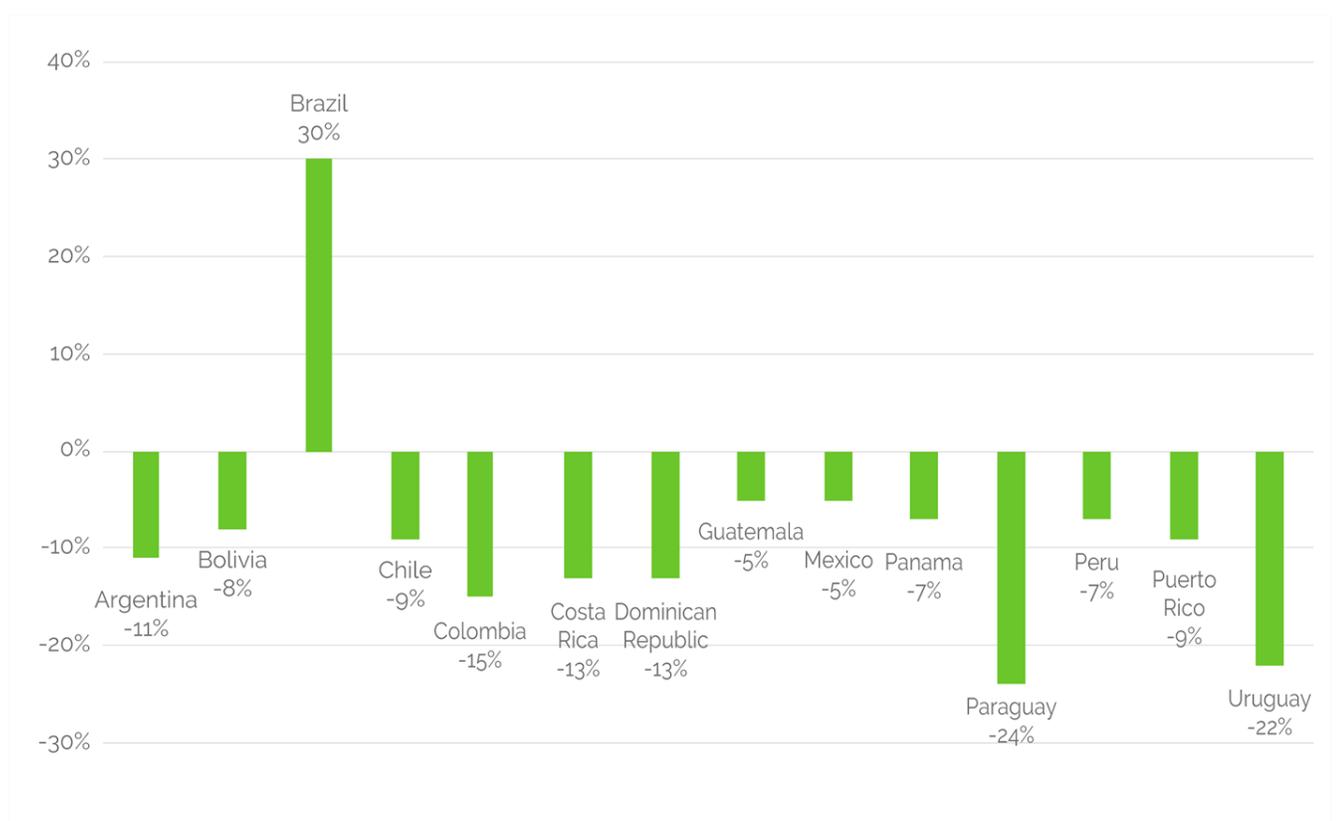


### WHAT DOES THIS MEAN IN THE FACE OF A PANDEMIC?

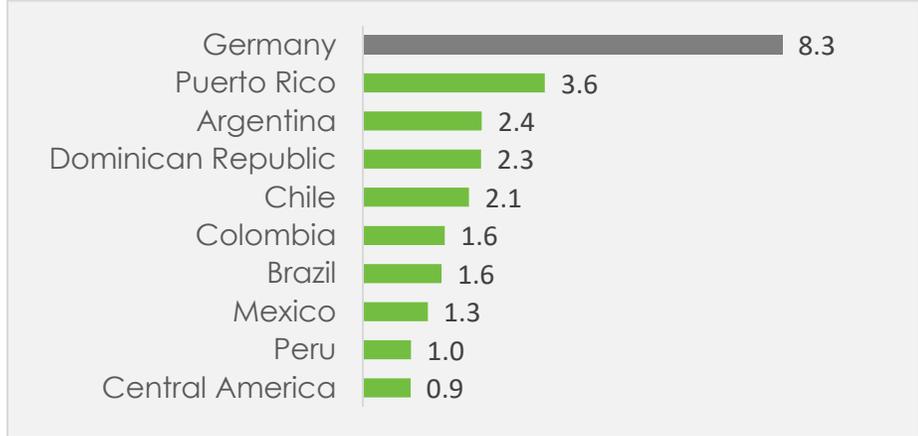
- Hospitals in LAC **don't have the same leveraging capabilities** as those in other regions in order to acquire capital equipment and expand their capacity.
- Acquiring equipment **happens in a fragmented manner** rather than a coordinated effort.
- Getting the equipment to hospitals is **more complicated** and will **take more** time to install.

# LatAm has limited initial capacity further cramped by a reduction of the installed base of ventilators in recent years

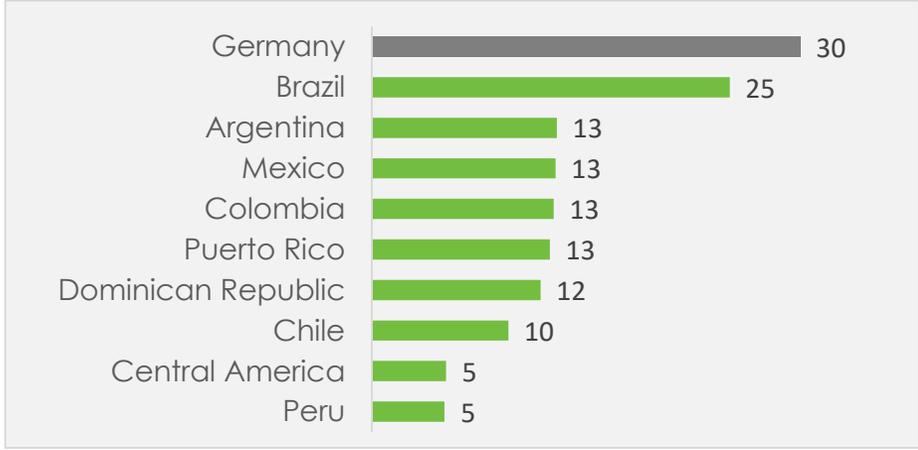
Ventilator Counts in Latin American Hospitals, 2017-2019



Number of Hospital Beds (per 1,000 people)

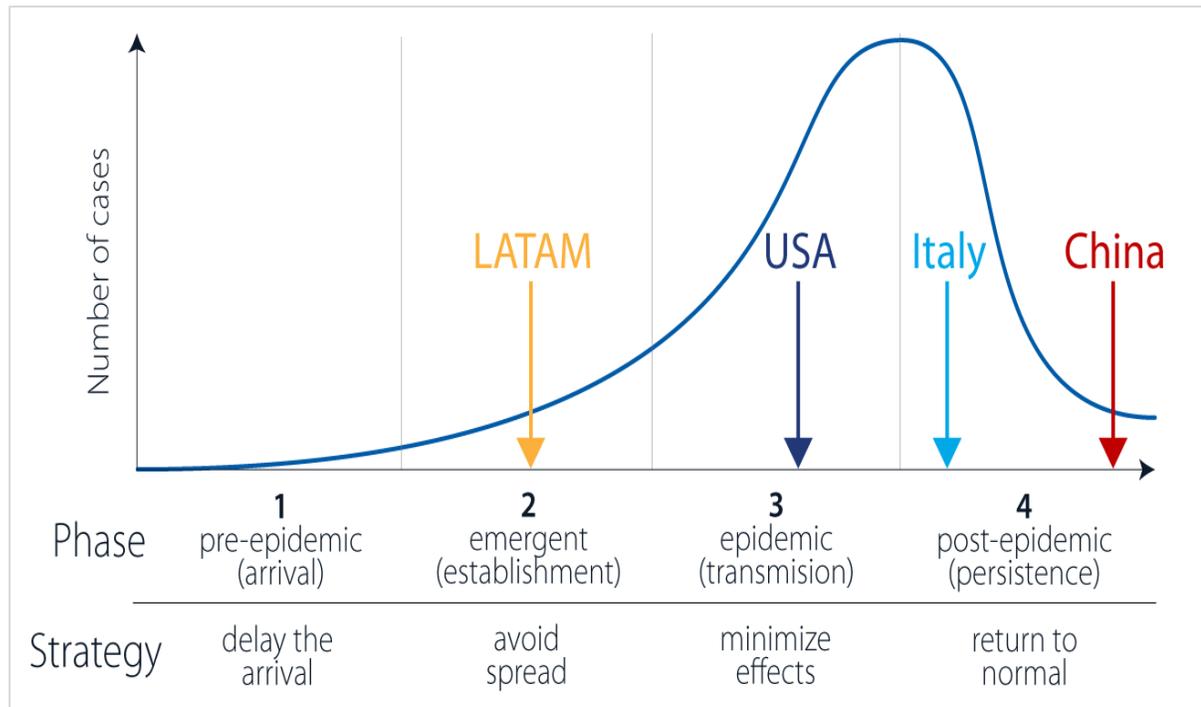


Number of Ventilators (per 100,000 people)

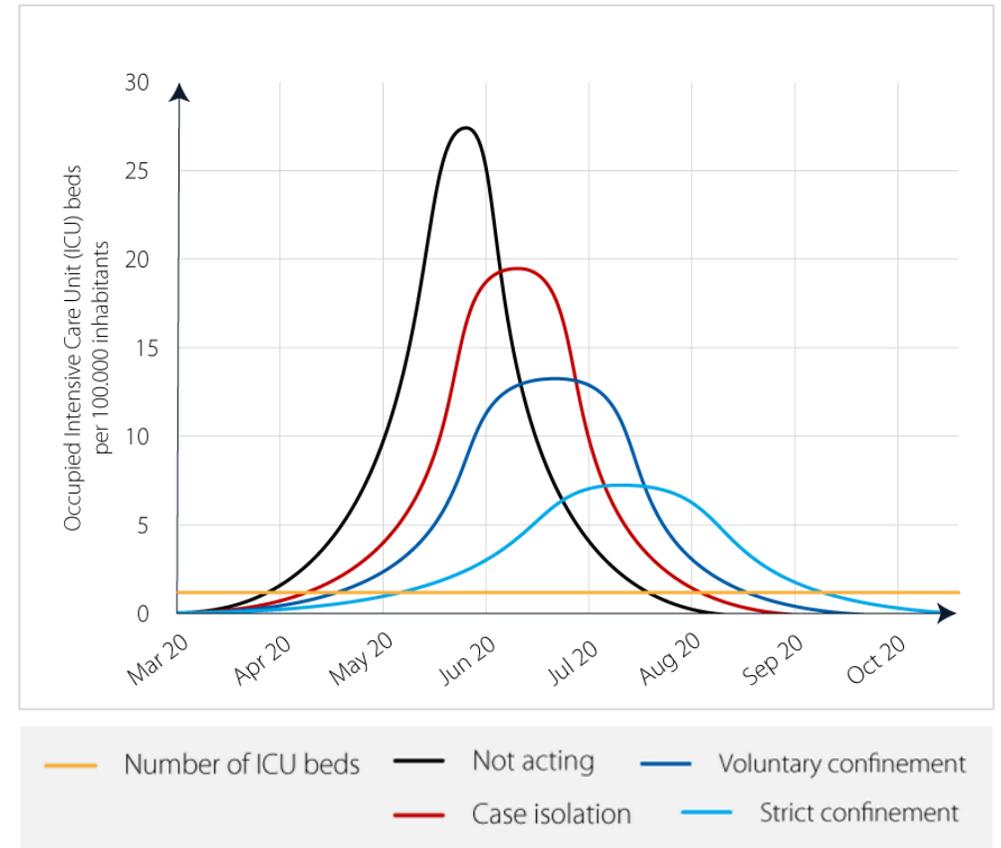


# Latin America needs to “flatten the curve”

## Epidemic Phases and their Respective Strategies



## COVID-19 Pandemic Scenarios for LatAm



## Poll Question

**In your opinion, which industry sectors stand to come out ahead of the COVID-19 crisis?**

- HR and HR services
- Hospital supplies
- Insurance companies
- Private care
- Telemedicine
- Remote communication tools



## Foreseeable impact of COVID-19

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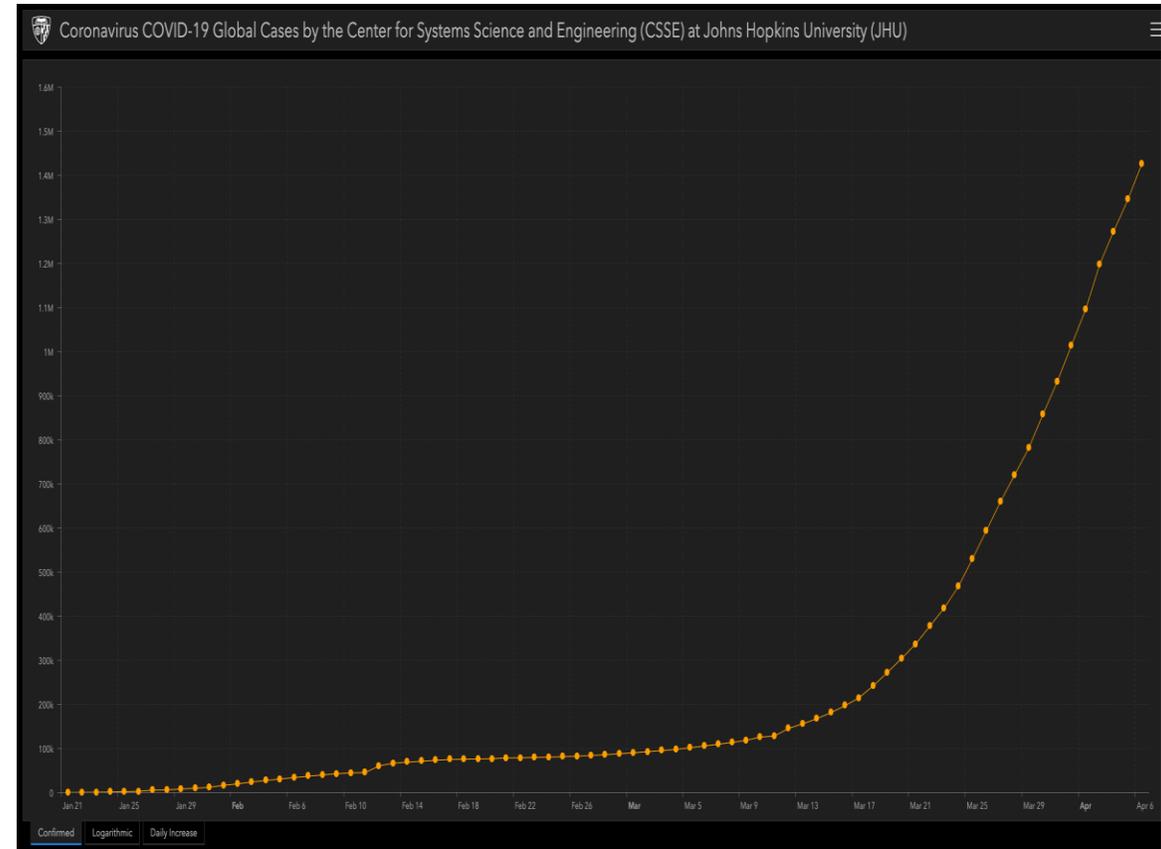
# Exponential patient surge will stress the system



## PATIENT SURGE

- The patient surge is pushing hospital systems to the limits of their capacity.
  - Hospitals are setting up tented triage areas outside their facilities to diagnose patients outside confines of the hospital.
- COVID-19 reached Latin America later than other regions, indicating an offset in regard to the stress on the hospital systems.

## Reported cases of COVID-19, Globally

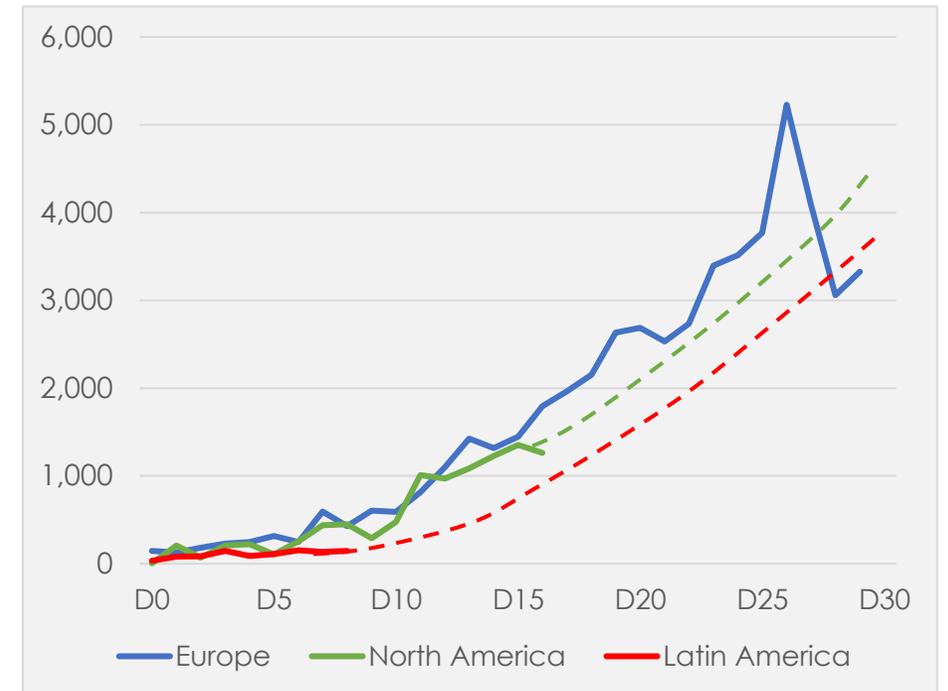


Source: John Hopkins University  
Date: April 8, 2020

# Latin America follows global epidemiology trends; yet under-reporting cases

- Latin America is under-reporting cases while tests have yet to be widespread.
- Social distancing measures were implemented at different times across the region, thus impacting the spread of the virus.
  - Argentina and Colombia started social distancing early (March 12) and reported 42 and 25 deaths respectively by April 5. Both countries are currently on total lockdown.
  - Brazil and Mexico started social distancing a week later (March 19) and reported 359 and 60 deaths respectively by April 5. Both countries are currently on partial lockdown.
- The first 200 deaths associated to COVID-19 were reached at different times across the globe:
  - Europe: March 9
  - North America: March 22 (11 days after Europe)
  - Latin America: March 28 (8 days after North America)
- D-0 represents the day that the region surpassed 200 reported deaths associated to COVID-19.

Reported deaths per day, by region



Source: WHO Situation Reports

# The surge in patients is pressuring the installed capacity



PATIENT SURGE

## Installed capacity

- Engulfs and consumes entire HC system capacity
- Public HC can no longer meet demand

## Dealing with reality

- Stopping all Hospital projects in order to focus 100% on supporting frontline staff
- Other conditions are no longer treated (ex: cardiovascular care)

# Areas experiencing the greatest stress

## INFRASTRUCTURE

- Require Public / Private collaboration to increase capacity

## HR

- Integration of additional medical staff into systems (students, retired staff, emergency workers, etc.)
- Manage burn-outs (psychological support) for frontline staff + support staff (specifically IT)
- Leadership and Communication

## TECHNOLOGY

- 100% focused on dealing with the crisis
- E-training: Onboarding new staff (docs, nurses, support, etc.)
- Increased use of collaboration tools
- Control and measure what is going on in the H at all times
  - Occupation rates; Ventilator usage
- Increased collaboration between hospitals
  - Occupation rates, Ventilator usage, Patient flows
  - Security protocols
- Telehealth: Ramp up and increase
- Increased internet demand (penetration and speed) – fixed line infrastructure of 90%
- Increase in Cybersecurity attacks

## MATERIALS

- Supply chain
- Gowns, gloves, face masks, etc.
- Disinfectants, gels, etc.

## TRIAGE

- Ability for patients to self screen
- Options for patients to stay away from the H
- Alleviate the system; Reduce the spread

## Poll Question

**Given the current context, what type of LatAm market information would be most helpful for you?**

- Reports on installed base of equipment
- List of hospitals by number of beds and ICUs
- Lists of procedures and in which hospitals they are being conducted
- Reports on which products are selling the most right now



# Crisis and Opportunity

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# Areas in Crisis and Areas for Opportunity

## CRISIS

- Supply chain interruptions (diagnostics, equipment, etc.)
- Frontline staff under pressure
- IT function as critical nerve
- Displacement of other surgeries
  
- HCPs risk
- Lack of capacity and not enough processes in place to flatten the curve
- Lack of accountability and social responsibility

## OPPORTUNITY

- Leadership – Redefine our businesses
- Change implementation
- Innovation – How we work, How we deliver care
- Collaboration across HC ecosystems stakeholders
- Adoption of new technologies - HC better, less expensive, faster and more accessible
- Increase Preventive care and early treatments
- Simplify processes



# HOSPISCOPE

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**HOSPISCOPE** will let you gain unparalleled market knowledge, including commercial target identification, key account insights, blind spot reduction and market mapping.

- ✓ 89% coverage, 55% fill rate
- ✓ 17 countries
- ✓ Beds, Equipment, Installed base, Technology, Infrastructure

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- ✓ Brazil, Mexico, Colombia, Chile
- ✓ Over 2 M procedures mapped
- ✓ Annual data by institution

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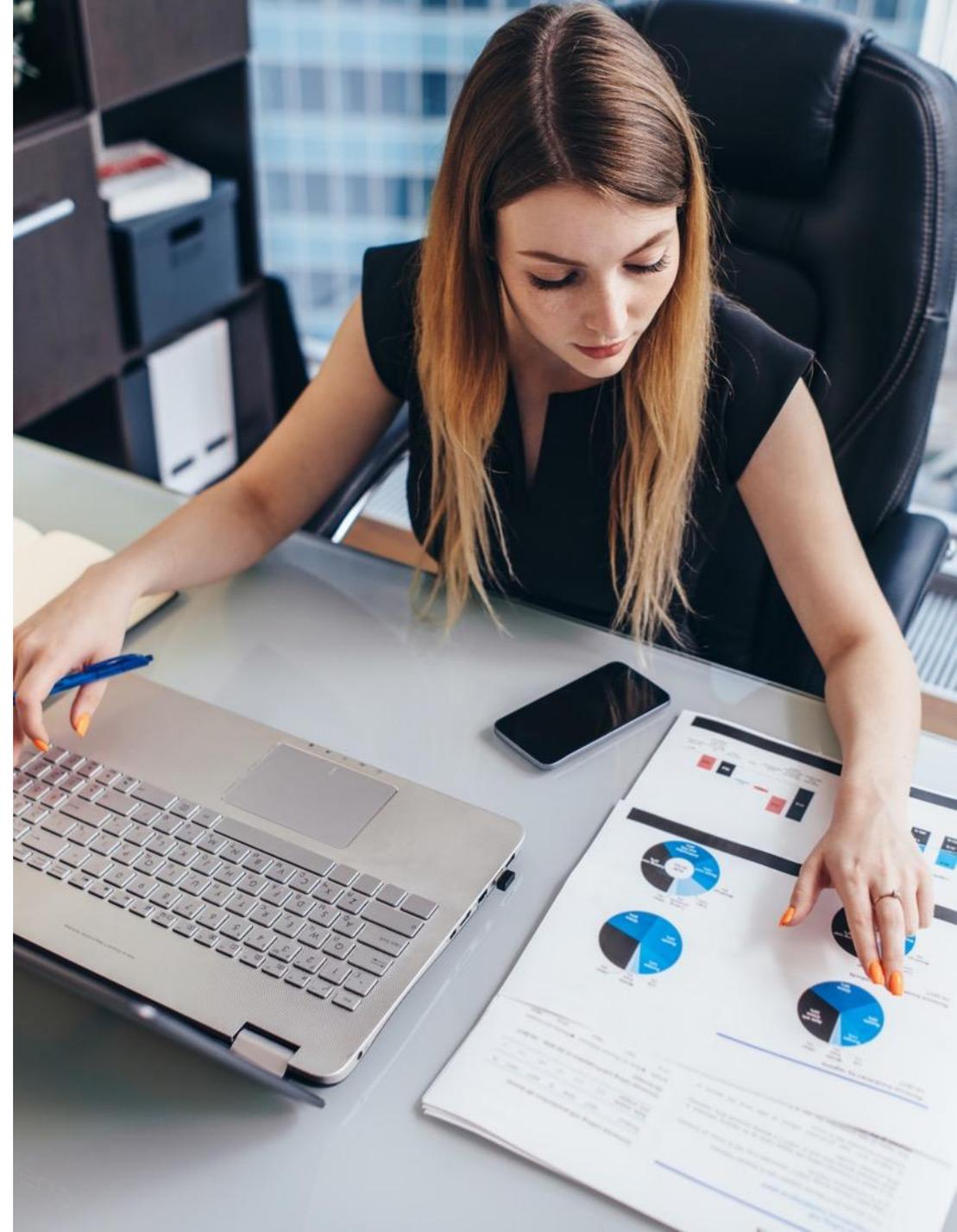
SHARESCOPE allows equipment and device manufacturers to track the **size of the market** and their **market share** in a consistent and accurate manner.

- ✓ 95% accuracy
- ✓ Quarterly updates
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# IN-SCOPE

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- ✓ Opportunity analysis
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- ✓ Market sizing and segmentation
- ✓ Partner search & market due diligence
- ✓ Best practices





## Questions and Answers

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**MIAMI**

95 Merrick Way, 3<sup>rd</sup> Floor  
Coral Gables, FL 33134  
USA  
+1 305 938-0234

**MEXICO CITY**

Pestalozzi 923-B  
Col. Narvarte, CDMX 03100  
Mexico  
+52 (55) 7586-5045

**SAO PAULO**

Rua Cap. Cassiano Ricardo de  
Tolêdo, 191 – sala 415  
Centro, Jundiaí, SP 13201-840  
+55 (11) 98020-2006