

# MEDICAL DEVICES MARKET IN COLOMBIA

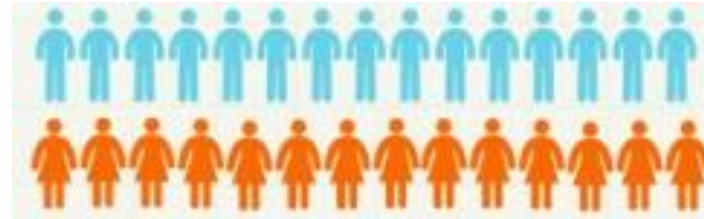
ORLANDO, 19TH OF JULY 2018

LUZ STELLA GÓMEZ GÓMEZ

# Colombia's Health Care System

Total Population: 48,7 MM

94,41% coverage



**8%**

Total Health  
Expenditure  
as a % of GDP

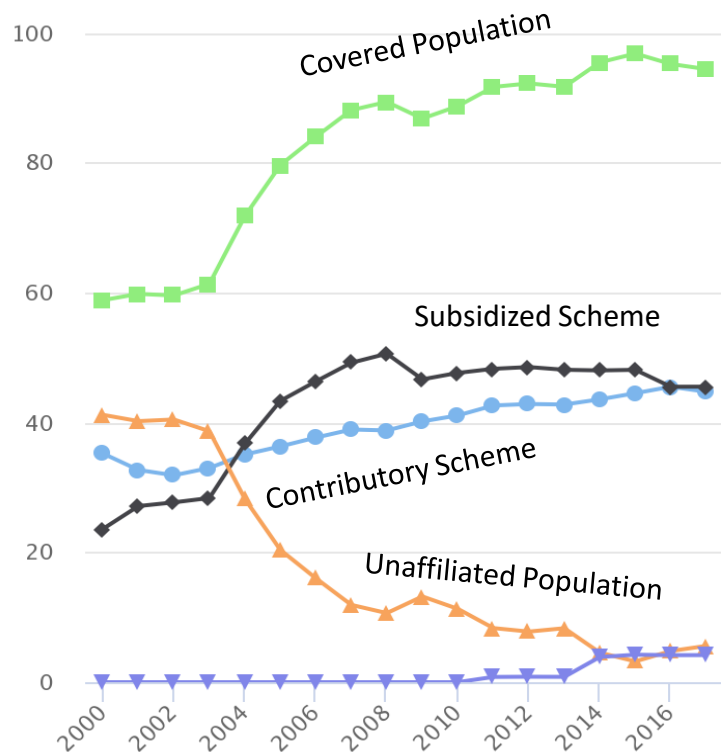
Contributory Scheme → 44,72%

Subsidized Scheme → 45,51%

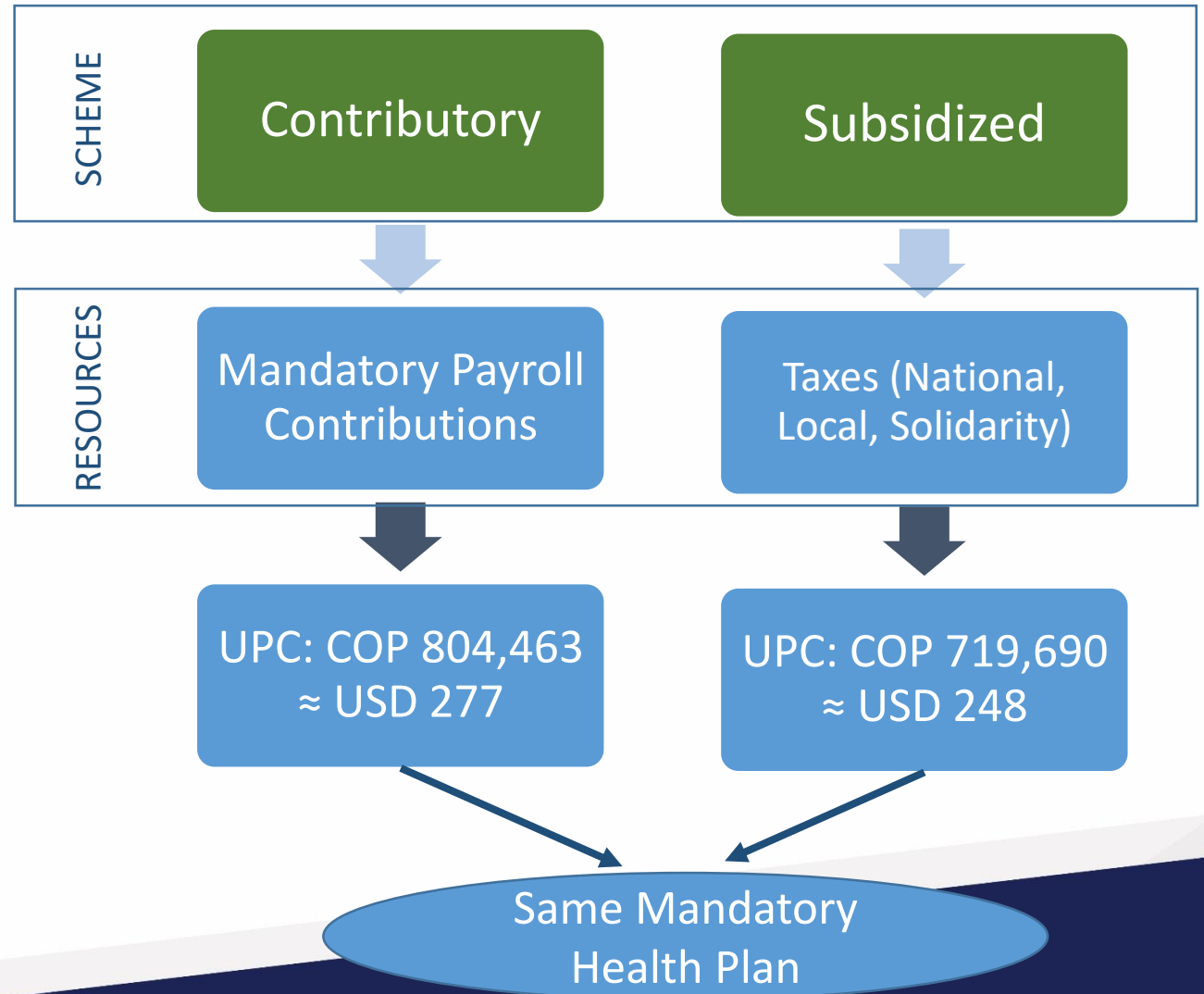
Unaffiliated population → 5,59%



# Colombia's Health Care System



Source: Asi Vamos en Salud



Source: Minsalud

# Hospital Infrastructure

2,594 Hospitals/Clinics



**34%** PUBLIC

**66%** PRIVATE

**83,912 Beds**  
**17 per each 10,000 citizens**

# Key Insitutions



**MinSalud**

Ministerio de Salud  
y Protección Social

Health Policy



Surveillance, inspection and control



Inspection, monitoring and control of producers and marketers of medicines, food, cosmetics and medical devices



Public health surveillance and control



Instituto de Evaluación  
Tecnológica en Salud

Health Technology Assesment

# Medical Devices Market - COLOMBIA



0,6%

Of the **Global Medical Devices Market**

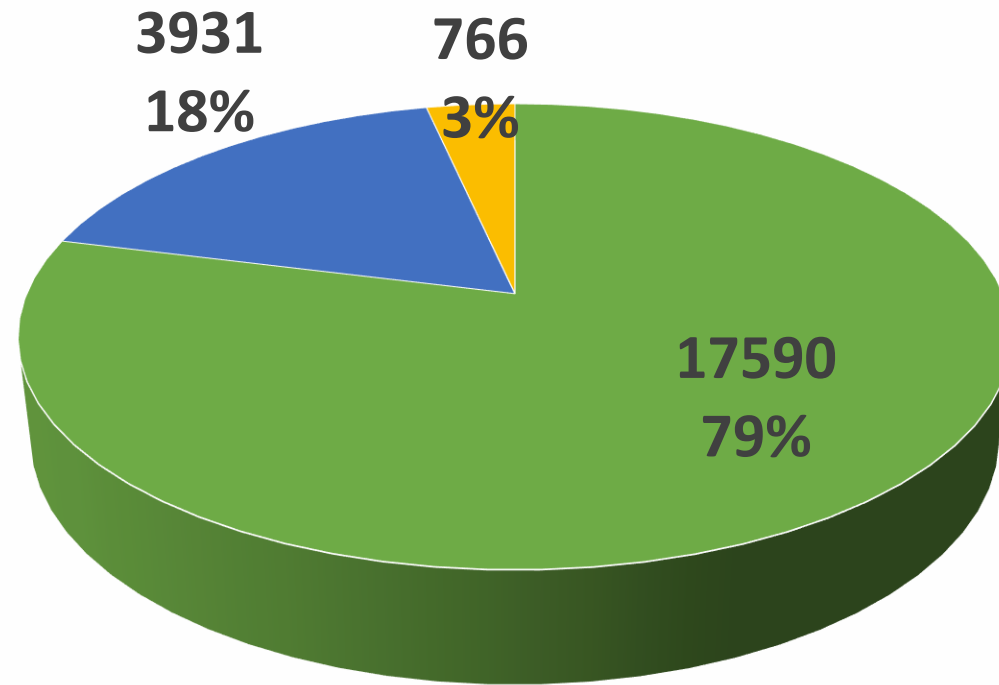
93 %

Comes from **imports**

6,82%

Of the **Total Health Expenditure**

# Sanitary Registries - COLOMBIA



■ Medical Devices   ■ IVD   ■ Dental Devices

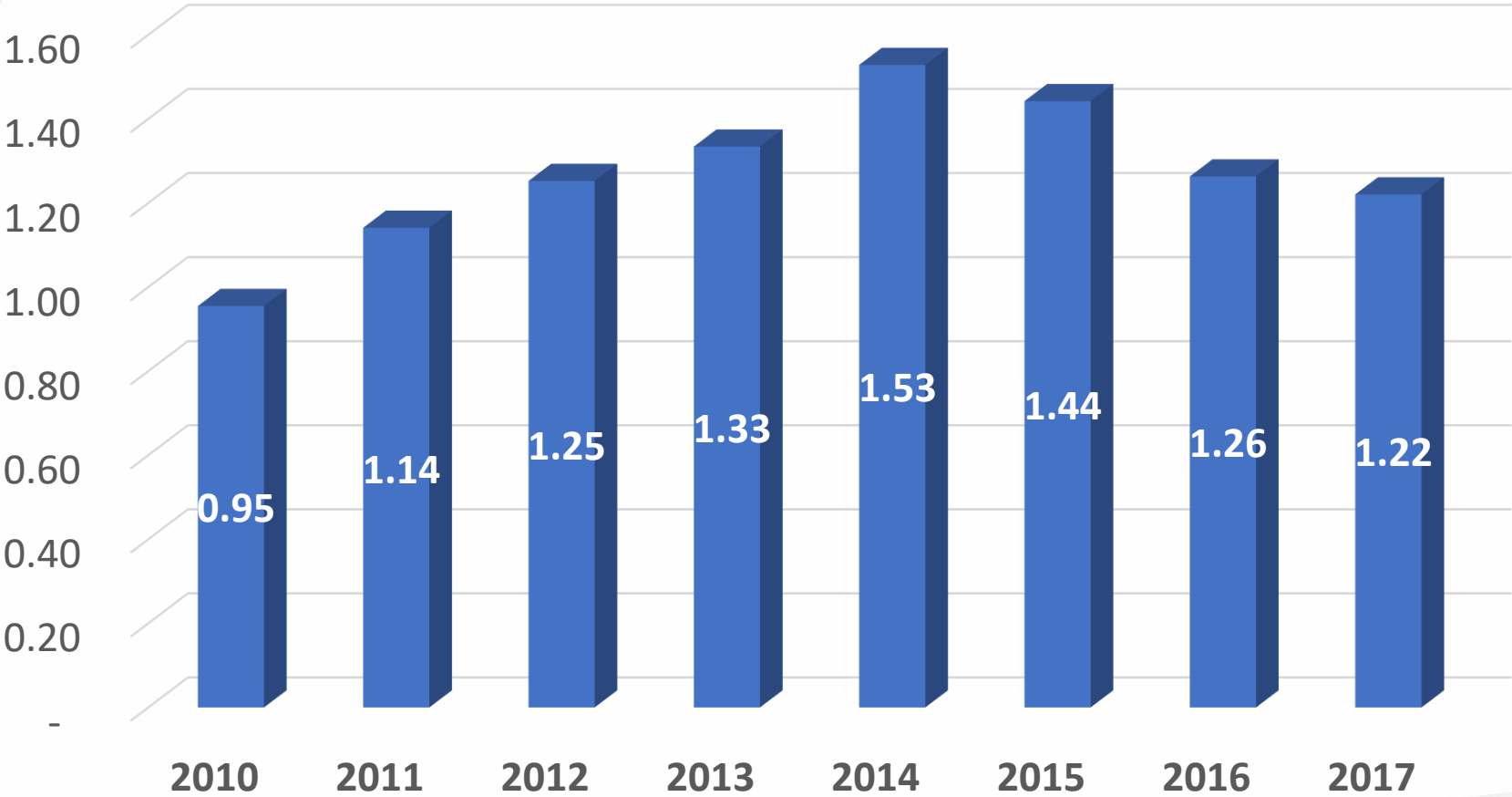
Source: Reporte Oficina de Tecnologías de la Información - INVIMA (Corte 31 de enero 2017)

# Manufacturers and Distributors

Product	Manufacturers	Distributors	Total
Medical Devices	468	2.097	2.565
Customized Orthopedic Devices	93	-	93
Customized Visual Devices	70	-	70
IVD	27	258	285
<b>Total</b>	<b>658</b>	<b>2.355</b>	<b>3.013</b>
%	<b>22%</b>	<b>78%</b>	

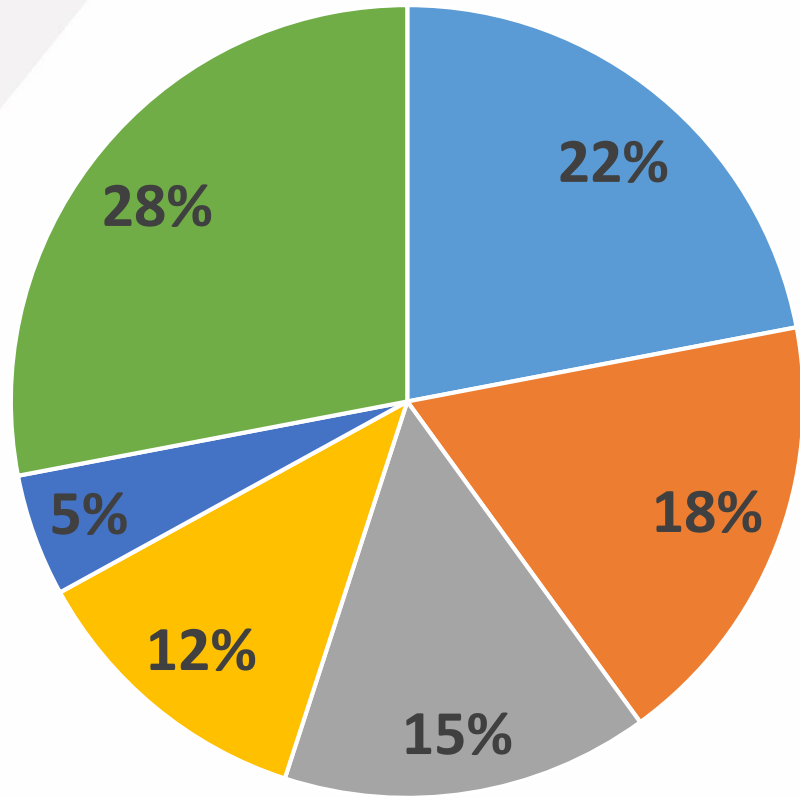


# Medical Devices Market - COLOMBIA



**Total Market Size:  
1,3 B FOB USD**

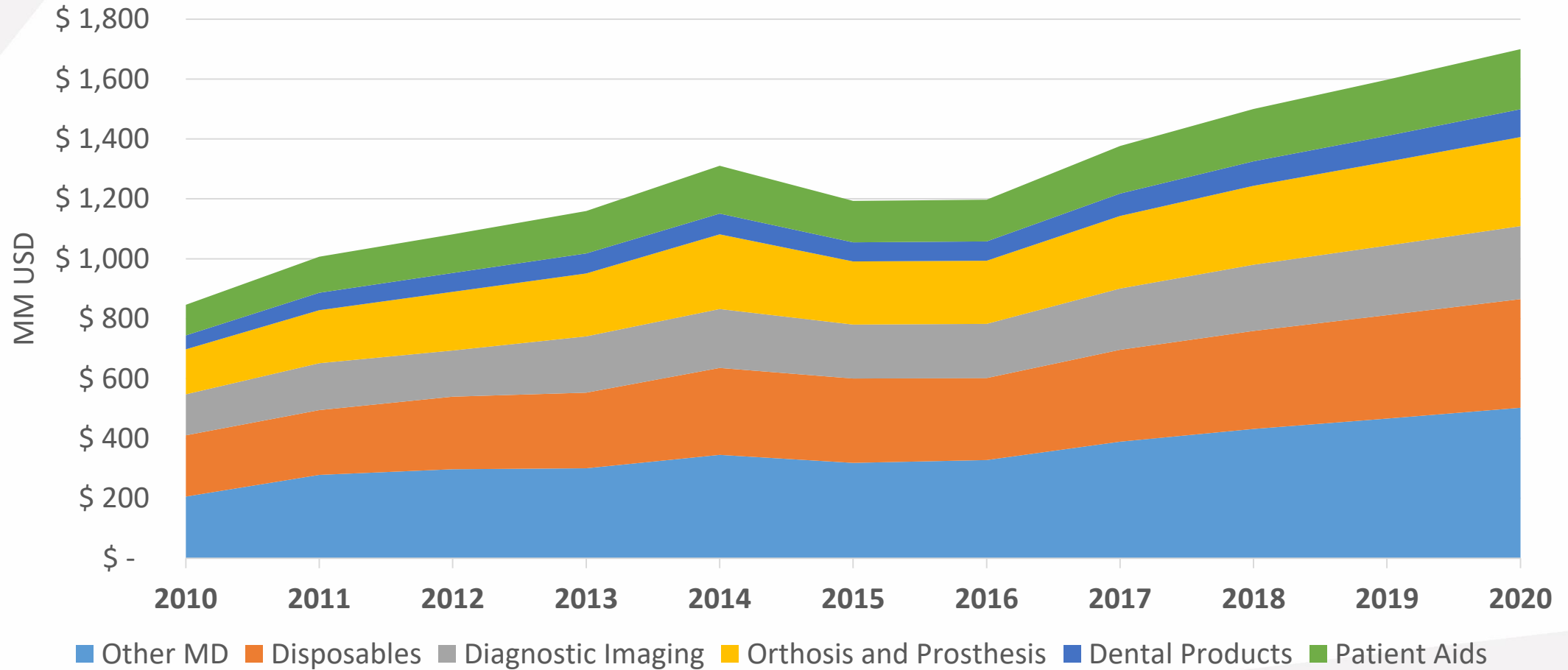
# MD Market Size by Category - COLOMBIA



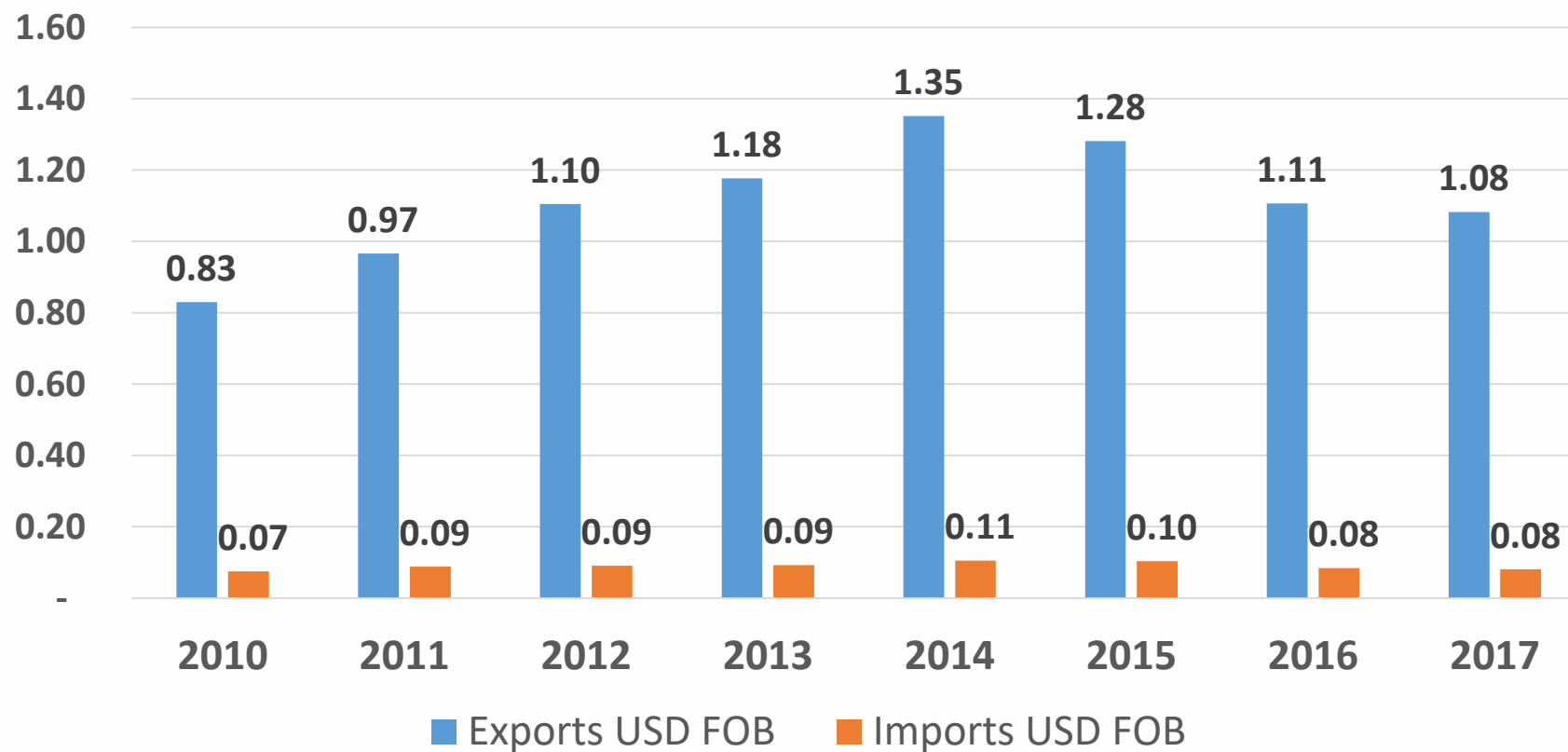
- Disposables
- Orthosis & Prosthesis
- Diagnostic Imaging
- Patient Aids
- Dental Products
- Other MD

	2010	2017
Disposables	24%	22%
Orthosis & Prosthesis	18%	18%
Diagnostic Imaging	16%	15%
Patient Aids	12%	12%
Dental Products	5%	5%
Other MD	24%	28%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

# MD Market Forecast 2010 – 2020 - COLOMBIA



# Trade Balance – Medical Devices (Billion FOB USD)



# Industry Trends



NEW REIMBURSEMENT MODELS



REGULATORY CHANGES



DRG



BIG DATA

# Market Access

## Country



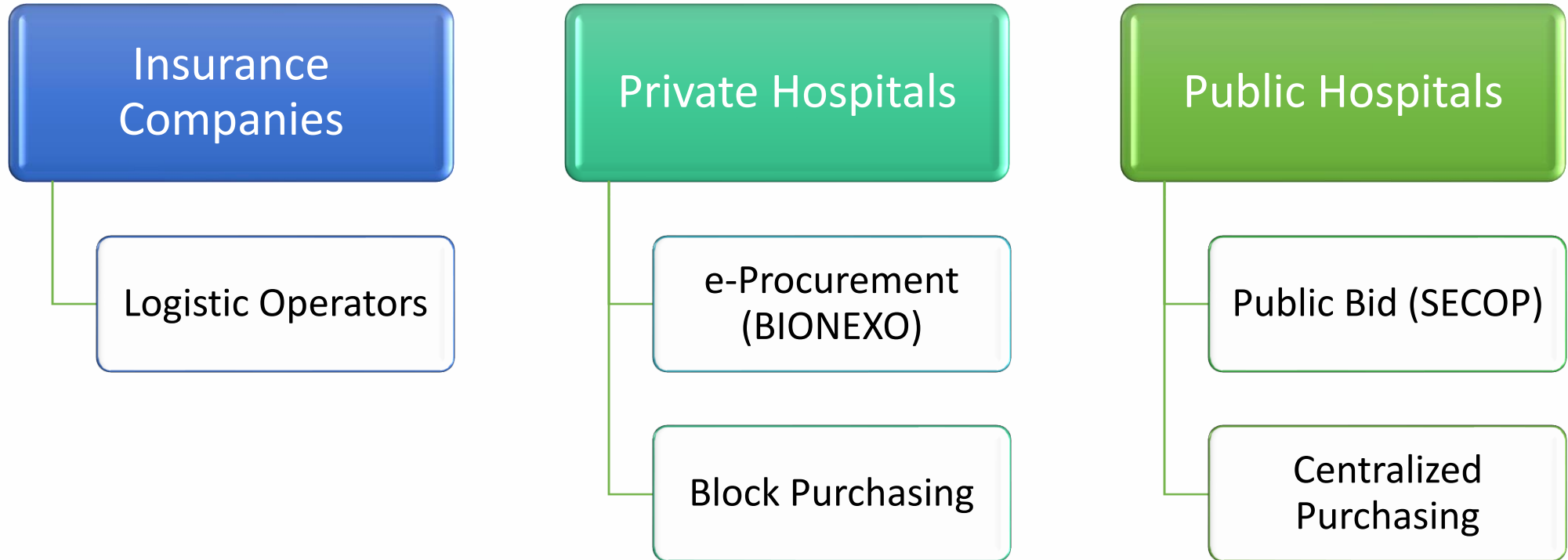
- Registration of the products before INVIMA.
  - Time varies depending on Risk Class
- HTA is intended to be a requirement for product registration according to Development National Plan – Art. 72 (SR – P – AT)
  - Not regulated yet.

## Hospitals

1. Product tests with Clinical Specialists
2. Clinical Concept
3. Quotation
4. Price comparison between brands



# Procurement Process



Product Standardization



Semantic Standard



Price Control

# Challenges and Changes



## INSURANCE COMPANY

Payment for Results  
Risk Management  
Protocols and Guidelines

## HOSPITAL

Reduction in the number of suppliers  
Strategic Relationships  
One Single Point of Contact - KAM  
e-Procurement - BIONEXO  
Radio Frequency for Inventory Management  
Block Purchasing  
Consignment Inventory

## SUPPLIER

Risk Sharing Arrangements  
Health Technology Assessment



