

# MEXICAN MEDICAL SECTOR

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# OVERVIEW OF MEXICO

- **Population: 120 million people in 2013**
- **Estimated 125 million by 2025**
- **Population increase annual index 1.9 %**
- **Life expectancy: 74.7 years**
- **Average age: 27 years in 2013, 32 years by 2025**
- **Per capita income: US\$ 15,600 in 2013**





# IMPORT MARKET

## Imports of Medical Devices (U.S. million dollars)

Group of products	2011	2012	2013
<b>Medical equipment</b>	<b>570.1</b>	<b>623.7</b>	<b>668.5</b>
Annual increase		10.9 %	7.2 %
<b>Medical disposables</b>	<b>938.3</b>	<b>986.4</b>	<b>1105.0</b>
Annual increase		10.5 %	12.0 %
<b>Medical instruments</b>	<b>2032.7</b>	<b>2368.0</b>	<b>2237.0</b>
Annual increase		11.6 %	(5.5 %)
<b>Dental products</b>	<b>365.0</b>	<b>399.0</b>	<b>368.6</b>
Annual increase		10.9 %	(7.7 %)
<b>TOTAL IMPORTS</b>	<b>3,842.6</b>	<b>4,325.3</b>	<b>4,328.7</b>
Annual increase		11.2 %	0.08 %



# IMPORTS FROM THE U.S.

## Imports of Medical Devices from the U.S.(U.S. million dollars)

Group of products	2011	2012	2013
<b>Medical equipment</b>	<b>257.7</b>	<b>278.6</b>	<b>264.3</b>
% of imports	45.2 %	44.7 %	39.5 %
<b>Medical disposables</b>	<b>938.3</b>	<b>986.4</b>	<b>1105.0</b>
% of imports	67.0 %	67.5 %	67.5 %
<b>Medical instruments</b>	<b>2032.7</b>	<b>2368.0</b>	<b>2237.0</b>
% of imports	43.7 %	36.6 %	41.7 %
<b>Dental products</b>	<b>365.0</b>	<b>399.0</b>	<b>368.6</b>
% of imports	68.5 %	72.0 %	69.8 %
<b>TOTAL IMPORTS FROM U.S.</b>	<b>1,981.3</b>	<b>2,061.2</b>	<b>2,200.0</b>
% of imports	51.6 %	47.7 %	50.0 %



# MEXICAN MARKET

- **About 90 % of medical equipment and instruments and 20 % of medical disposable products are imported**
- **Big production of disposable products, orthopedic devices & supplies**
- **Emerging production of medical equipment, mainly by large U.S. corporations**
- **Main competitors are: Belgium, Brazil, Canada, China, France, Germany, Israel, Italy, Japan, Netherlands, South Korea and the UK**
- **All medical devices of U.S. origin, can be imported duty free. They need to pay 16 % of VAT over invoice value**



# END USERS

- **PUBLIC SECTOR**
- **(70-80 % of market)**
- **Mexican Institute of Social Security (IMSS)**
- **Institute of Social Security and Services for Public Employees (ISSSTE)**
- **Secretariat of Health (SSA)**
- **Popular Insurance (Seguro Popular)**
- **PRIVATE SECTOR**
- **(20-30 % of market)**
- **Few hospital chains: Grupo Angeles, Hospital ABC, Star Medica, Hospital Español**
- **About 3,140 private hospitals. 97 % has less than 50 beds**
- **Private doctors**



# MARKET TRENDS

- **Patients are becoming more quality-minded and more aware of the cost-value relationship in services**
- **More patients using private medicine**
- **Medical insurance increasing coverage**
- **More companies offering prepaid medicine programs**
- **Increased home care services for all kinds of patients**
- **Healthcare institutions increasing use of integral surgery services**
- **Increasing use of IT**
- **All institutions looking to be more efficient and improving services for patients**
- **Public sector is trying to standardize services in all its institutions**
- **Increasing preventive medical programs**
- **Looking for universal coverage**



# HOW TO SELL MEDICAL DEVICES IN MEXICO

- **All products need to have sanitary registration/market approval**
- **Products must be FDA approved for sale in the U.S.**
- **Legally appointed distributor or company branch**





# BEST PROSPECTS

- **Anesthesia equipment**
- **Defibrillators**
- **Electrocardiographs**
- **Electroencephalographers**
- **Gamma ray equipment**
- **Incubators**
- **Laser equipment**
- **MRIs**
- **Patient monitors**
- **Respiratory therapy equipment and accessories**
- **Ultrasounds,**
- **X-rays**
- **Surgical instruments**
- **Portable equipment**
- **IT for health care**
- **Home care products**



# WHERE TO GO?

- **We have offices in three Mexican cities:**
  - **Mexico City: (011-52-55) 5080-2000**
  - **Guadalajara: (011-52-33) 3615-1140**
  - **Monterrey: (011-52-81) 8047-3100**
  
- **WWW.BUYUSA.GOV/MEXICO**
  
- **WWW.EXPORT.GOV**



*Thanks!!!!*

