



# Commercial Sector: Medical Devices

## A Top Export Prospect for Mexico

September 2014

### Market Estimates

**Table 1. Medical Devices Market Overview**

(in US\$ millions)	2011	2012	2013 <sup>est</sup>
Total Market Size	5,660	6,170	6,337
Total Local Production	7,275	8,380	8,039
Total Exports	5,456	5,535	6,029
Total Imports	3,842	4,325	4,328
Imports from the U.S.	1,981	2,061	2,199
Exchange Rate: 1 USD	4.30	4.40	5.47

Total Market Size = (Total Local Production + Total Imports) - (Total Exports)

Source: Secretariat of Economy's Tariff Information System via Internet (SIAVI) & ProMexico

### Overview

Mexico's imports of medical equipment, instruments, disposable and dental products totaled \$4.3 billion in 2013. This represented about 90 percent of the medical equipment and instrument market and approximately 40 percent of medical disposable products and dental materials. About 50 percent, or approximately \$2.2 billion of imports, came from the United States. The main third country suppliers of medical devices are: Brazil, Canada, China, France, Germany, Israel, Italy, Japan, the Netherlands, South Korea, and the United Kingdom.

Medical products from the U.S. are highly regarded in Mexico due to high quality, after-sales service, and pricing, compared to competing products of similar quality. Consequently, U.S. medical equipment and instruments have a competitive advantage and are in high demand in Mexico.

Public healthcare institutions account for 70-80 percent of all medical services provided nationwide, while private healthcare institutions serve approximately 25-30 percent of the Mexican population, including the 32 million people with private medical and accident insurance. In 2013, Mexico had 1,169 public hospitals, of which 194 were highly specialized medical centers, and 3,560 accredited private hospitals, of which only about 100 had more than 50 beds and the capacity to offer highly specialized services.

## Sub-Sector Best Prospects

Best prospects include the following:

- Anesthesia equipment
- Defibrillators
- Electrocardiographs
- Electroencephalographs
- Electro surgery equipment
- Gamma ray equipment
- Incubators
- Lasers for surgery
- MRI equipment
- Patient monitors
- Respiratory therapy equipment
- Suction pumps
- Ultrasound equipment
- X-ray equipment

In order to successfully compete, key factors include quality, after-sales service, warranty, and price.

## Opportunities

Large public and private hospitals regularly seek out the most modern and highly-specialized medical devices. Some medium and small private hospitals with limited budgets buy used or refurbished equipment. Public hospitals cannot buy used or refurbished products by law.

In order to reduce costs, many public and private hospitals are outsourcing surgical procedures to companies that offer “integral surgery services.” These services are delivered as a “pay per event” and include all of the necessary equipment and personnel required to perform a surgery. As a result, hospitals are able to avoid big capital investments in materials, implants, pharmaceuticals, and instruments, while gaining access to some of the most modern specialized surgical products.

The majority of medical and healthcare products need to be registered with the Federal Commission for the Projection against Sanitary Risk (COFEPRIS), the Mexican agency in charge of providing market approval for all medical products prior to sale or use in Mexico. Some companies have experienced significant delays in receiving registration/marketing approvals from COFEPRIS. In addition, foreign medical device manufacturers require a legally appointed distributor or representative in Mexico, responsible for the product and its registration process. It is highly recommended that U.S. companies ensure that they carefully submit all documents the first time and exactly as requested to COFEPRIS, as small errors or omissions have resulted in long delays in some cases.

## Web Resources

### Public Institutions

Secretariat of Health	<a href="http://www.salud.gob.mx">http://www.salud.gob.mx</a>
Federal Commission for the Projection against Sanitary Risk (COFEPRIS)	<a href="http://www.cofepris.gob.mx">http://www.cofepris.gob.mx</a>
Mexican Institute of Social Security (IMSS)	<a href="http://www.imss.gob.mx">http://www.imss.gob.mx</a>
Institute of Social Security and Services for Public Employees (ISSSTE)	<a href="http://www.issste.gob.mx">http://www.issste.gob.mx</a>
National Center for Health Technology Excellence	<a href="http://www.cenetec.salud.gob.mx">http://www.cenetec.salud.gob.mx</a>

### Private Institutions

Grupo Empresarial Angeles	<a href="http://www.grupoempresarialangeles.com">http://www.grupoempresarialangeles.com</a>
Star Medica	<a href="http://www.starmedica.com">http://www.starmedica.com</a>
Hospital San Jose	<a href="http://www.hsj.com.mx">http://www.hsj.com.mx</a>
Centro Medico ABC	<a href="http://www.abchospital.com">http://www.abchospital.com</a>
Hospital Español	<a href="http://www.hespanol.com">http://www.hespanol.com</a>
Amerimed Hospitales	<a href="http://www.amerimed.com.mx">http://www.amerimed.com.mx</a>
Grupo Christus Muguerza	<a href="http://www.christusmuguerza.com.mx">http://www.christusmuguerza.com.mx</a>
Medica Sur	<a href="http://www.medicasur.com.mx">http://www.medicasur.com.mx</a>

### Events

Expo Med June 18-20, 2014 June 10-12, 2015 Mexico City, Mexico	<a href="http://www.expomed.com.mx">www.expomed.com.mx</a>
Expo DICLAB September 18-19, 2014 Mexico City, Mexico	<a href="http://www.expodiclab.com">http://www.expodiclab.com</a>

AMIC Dental Expo [www.amicdental.com.mx](http://www.amicdental.com.mx)  
November 12-16, 2014  
May 12-15, 2015  
Mexico City, Mexico

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