EMeRG HospeTrack

HOSPITAL INFRASTRUCTURE INSIGHT ETHIOPIA 2020

Installed Base I Opportunity I Health Personnel

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196 Hospitals covered across the country.

With Imaging & Patient Monitoring Device Penetration as Low as 25%, the Success of Ethiopia's Ambitious Community Health Scaling Program Will Depend on Infrastructural Growth

As of 2019, about 200 hospitals were functioning in Ethiopia. Twenty of them provide tertiary care services with more expected to scale up in the next 2-3 years, driven by the Ethiopian Government's healthcare infrastructure expansion policies. The twenty tertiary care hospitals represent approximately 30% of the total inpatient beds in the country. However, only 4-5% of these tertiary care beds are equipped to provide intensive care services. The Government of Ethiopia has stated its intent to expand the presence of tertiary care services in the country, as part of the scaling up of their Community Health Insurance (CBHI) that began in 2016.

According to **EMeRG's new HospeTrack Hospital Intelligence for Ethiopia**, the largest opportunity in the immediate term will be around infrastructure build-up necessary for expanding tertiary care services. This will include growth in anaesthesia machines, ventilators, operating rooms, CT and MRI scanners. The data in the report shows there are less than 300 ventilators in the country - a questionable ratio to a total of 655 ICU beds. The report further states that there are less than 50 CT scanners and even lower number of MRI scanners in Ethiopia. The current limited penetration of imaging modalities and critical care equipment is expected to improve in the next 3-4 years, aided by favourable policy.

The growth opportunities in the secondary care segment is another area where there could be potential traction in the next five years. This will be especially true for some of the referral and district hospitals in the country. Currently, the 113 secondary care hospitals have less than 25% penetration in terms of imaging equipment such as X-Rays, Ultrasounds, and CT machines. This is where the Ethiopian public sector would potentially look to focus its efforts – strengthening the district level programs with diagnostic equipment.

A pivot from this report will quantitatively demonstrate a strong potential for the medical devices market in the country. The 20 tertiary care level hospitals in Ethiopia for example have over 72 operating rooms. The percentage penetration of Anaesthesia machines, ventilators, and X-Ray equipment in the same hospitals currently is lower than normal and offers significant growth potential. Such insights enable medical equipment companies to optimize their customer segmentation and help define targeted sales or marketing strategies.

The report provides account-level directional detail on total beds, ICU beds, ORs, ventilators, incubators, etc., along with Anaesthesia Machines, C-Arms, Cath Labs, PET, Nuclear, SPECT, CT, MRI scanners, Ultrasound and X-Ray machines, making it the only source of hospital-level intelligence for medical equipment installed base in Ethiopia. This dataset is a valuable tool for any organization that is in the process of optimizing sales targets, estimating market potential or building an account management plan in Ethiopia.

The report is a craftily designed dataset that provides a graphical summary of the health infrastructure in the country apart from an account-level view of resources, directional information on medical device installed base, hospital demographic and care services. The report commits itself as a tool to understand, visualize, and identify opportunity pockets at the hospital-level for medical devices manufacturers, and digital healthcare companies.

Key medical device companies featured in the dataset include: Aeonmed, AMS Medical System, Dräger Medical, Mindray, Siemens Healthcare, GE Healthcare, Whale Imaging, Philips Healthcare, Toshiba (Canon Medical Systems), Shenzhen BASDA, Hitachi Medical Systems, SIUI, Samsung, Medi-Future, Neusoft, Sonoscape, FUJIFILM SonoSite, Shimadzu Corp

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