EMeRG HospeTrack

HOSPITAL INFRASTRUCTURE INSIGHT IRELAND 2020

Installed Base I Opportunity I Health Personnel

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118 Hospitals and Diagnostic Imaging Centers covered across the country.

With sustained political will towards implementing Sláintecare, Ireland's Public Healthcare system is likely to present significant growth opportunities for medical device manufacturers

As of 2019, about 107 hospitals were functioning in Ireland. 26 of them provide tertiary care services and mostly belong to the public sector. Most public sector hospitals have been under tremendous pressure leading to high waiting lines for patients with no private health insurance. The private sector on the other continues to be in heavy demand especially with increased penetration of private health insurance. However, with the introduction of Sláintecare – Ireland's 10-year strategy to reform their healthcare system, the efforts around improving patient, user and clinician experience are likely to be expedited.

According to HospeTrack Hospital Intelligence for Ireland, the largest opportunity in the immediate term is likely to be around improvement of diagnostic facilities as well as development of an integrated system of care to allow healthcare professionals to work closely. This could potentially translate into investments in diagnostic modalities such as CT and MRI scanners as well as Ultrasound units to reduce the current waiting lines. For instance, the number of MRI scanners installed across various healthcare facilities in Ireland is estimated to be just below 90. This continues to add to the waiting lines where the estimated waiting time for an MRI scan could be all the way to 120 days.

The growth opportunities in the secondary care segment is another area where there could be potential traction in the next five years. Ireland's critical care infrastructure has improved over the years. Across the HSE (Health Service Executive) and Voluntary hospitals, the number of ICU beds now stands at just over 300. While the number of patient monitoring and mechanical ventilators have been traditionally sufficient, the recent COVID-19 pandemic prompted the HSE to order about 900 new ventilators. It is however estimated that the replacement of existing aging units within ICU and HDUs will present growth opportunities for medical device manufacturers.

A pivot from this report will quantitatively demonstrate a strong potential for the medical devices market in the country. For instance, only about 4 of the twenty tertiary care hospitals in Ireland have radiation therapy services including availability of LINAC. Such insights would enable medical equipment companies to optimize their customer segmentation and help define targeted sales and marketing strategies.

The report provides account-level directional estimates of 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 a critical source of hospital-level intelligence for medical equipment installed base in Ireland. 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 Ireland.

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: B.Braun, Carestream, Draeger, Elekta, Esaote, Fresenius, GE Healthcare, Hitachi, Hologic, Philips, Shimadzu, Siemens, Toshiba (Canon), Varian and Xograph

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