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HOSPITAL INFRASTRUCTURE INSIGHT SPAIN 2020

Installed Base I Opportunity I Health Personnel

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1,021 Hospitals and Diagnostic Imaging Centers covered across the country.

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Spanish medical devices market to be driven by the need for improved infrastructure and capacity in Operating Rooms and High Acuity Care

As of 2020, Spain has about 930 hospitals functioning across all levels of care. Over 200 of these hospitals demonstrate characteristics of tertiary care facilities and mostly belong to the public sector. With the highest life expectancy in Europe, high cancer survival rates as well as noteworthy penetration of key diagnostic and therapeutic medical devices, Spain has one of the best healthcare systems in the continent. However, with increased incidence of chronic diseases as well as rising hospitalization rates, the Spanish healthcare system's overall sustainability will continue to be challenged in the short-term future.

According to HospeTrack Hospital Intelligence for Spain, the largest opportunity in the immediate term is likely to be around improvement of surgical facilities as well as high-acuity care. For instance, Spain has over 4,300 operating rooms. It is estimated that over 2,400 of these ORs belong to the public sector. However, the waiting time for getting a surgery in these public hospitals is over 90 days. The waiting lines are typically higher for orthopedic and ophthalmology procedures. To ensure that the waiting times for specialized surgeries is reduced further, Spanish hospitals may require further up-gradation and replacement of anesthesia machines as well as C-arms.

Hospital Infrastructure Insight Spain 2020

The ongoing COVID-19 crisis has caused further pressure on the existing intensive care resources. It is estimated that Spain has over 5,700 beds that display characteristics of mid-to-high acuity care and suited for providing intensive care to patients. However, with the increasing rates of hospitalization for both chronic and unforeseen pandemics, the need for mechanical ventilators is likely to increase in short-term.

A pivot from this dataset will quantitatively demonstrate a strong potential for the medical devices market in the country. For instance, Spain has 83 PET-CT scanners and over 320 SPECT and Gamma Cameras to ensure adequate diagnosis especially for oncology. Such insights would enable medical equipment companies to optimize their customer segmentation and help define targeted sales and marketing strategies.

The dataset 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 Spain. 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 Spain.

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: Accuray, Agfa, B.Braun, Bellco, Canon / Toshiba, Carestream, Dornier, Draeger, DMS Imaging, Echolight, Elekta, Esaote, Fresenius, Fujifilm, Gambro (Baxter), GE Healthcare, Hitachi, Hologic, IMS Giotto, Metaltronica, Mindray, Oncovision, NewTom, Philips, Planmed, Radiologia, Richard Wolf, Siemens, Sonosite, Swissray, Varian and Ziehm

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