



Latin America Tracking

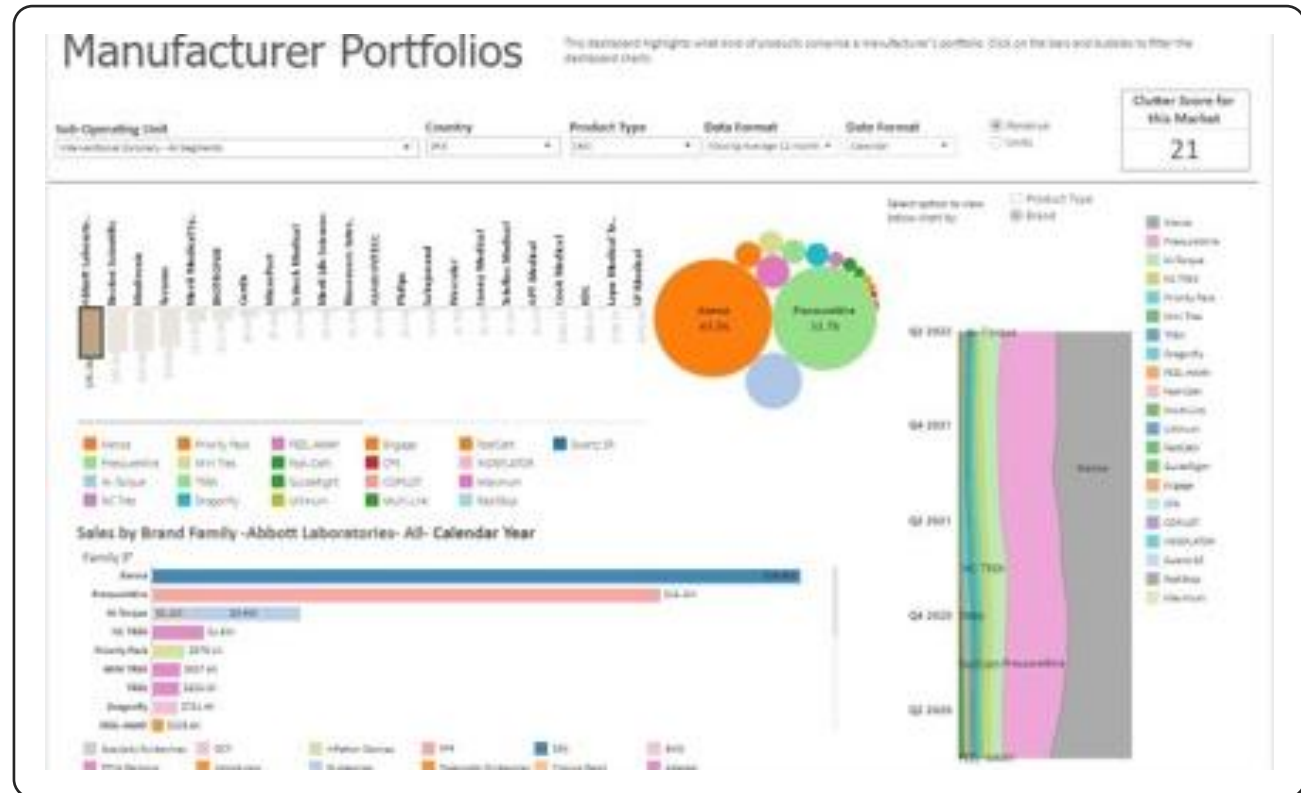
A collaborative solution from Clarivate and Global Health Intelligence.

LatAm BrandTrack

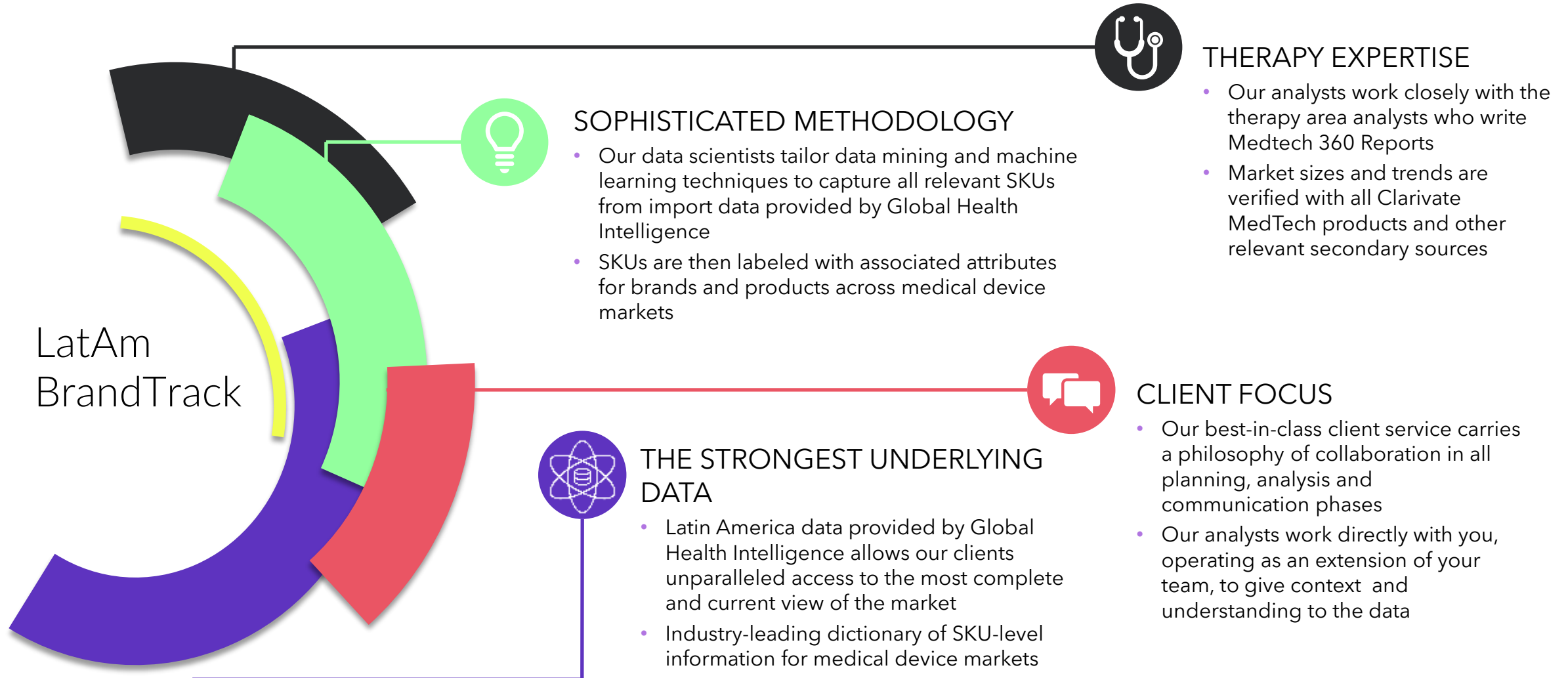
Healthcare intelligence that uncovers opportunities and maps the competition in emerging markets.

LatAm BrandTrack allows medical equipment and device manufacturers to track market size and share in a consistent and accurate manner.

- Over 400 product categories tracked at the SKU level
- Coverage: Brazil, Colombia, Chile, Argentina, Peru, Ecuador, Costa Rica, Panama, Mexico (pilot required)
- Quarterly updates



Why partner with Clarivate?





Tracking performance

Background, Objectives, Scope

Background

Real world data to track performance

As a global leader in medical devices and technology, tracking market size and share is critical to understanding performance in the region.

Typical market tracking metrics include:

- Revenue = Sell-out ; typically manufacturers with **in-house distribution** capabilities
- Revenue = FOB ; typically manufacturers with **distribution networks**
- Units
- ASP
- Commercial target segmentation



BrandTrack is a unique solution to help with your research needs.

With a set of unique data sources covering major markets across Latin America, Clarivate & GHI have curated and validated ready-to-access information to give you reliable and consistent insights, quarter after quarter.

\$10B

The market for medical devices in Latin America is valued at over \$10 billion/year.

78%

78% of the Latin American market is Brazil, Mexico, Colombia, Argentina and Chile

Coverage

COUNTRIES	• Brazil • Colombia • Argentina • Chile • Peru • Ecuador • Costa Rica • Panama
MODULES	1. Over 60 off-the-shelf modules available such as CRM, Wound Care, Ventilators, Hips and Knees. 2. Adding 70 modules by 2024 covering Orthopedics, Cardiovascular, Medical Imaging, Lab Equipment, and General Surgery markets.
REPORTING LEVEL	1. Integrated solution = Imports data, Tender data, ASP, analysis, Local competitors 2. Basic = Imports level analysis

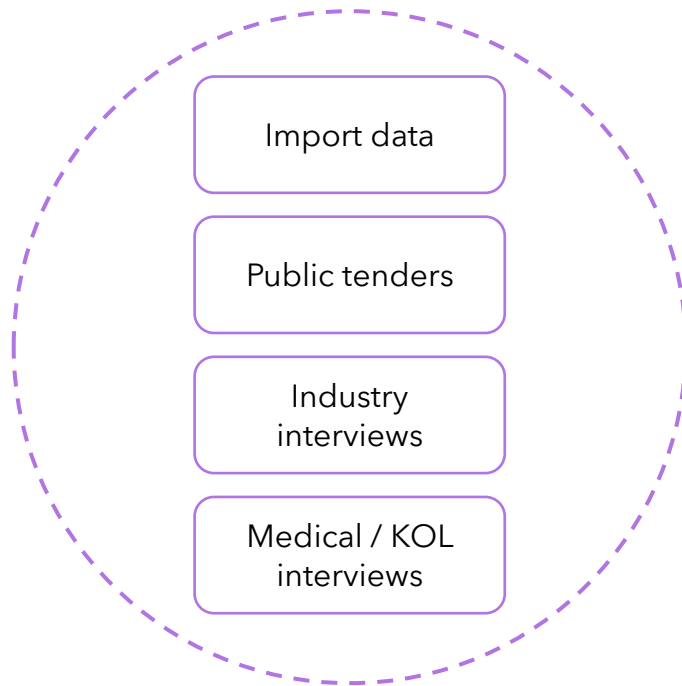


Methodology

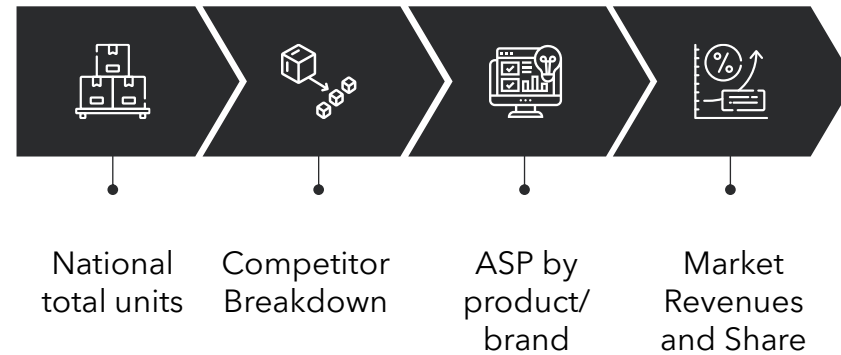
Datasets, Workflows, Collaborations

Research design & output

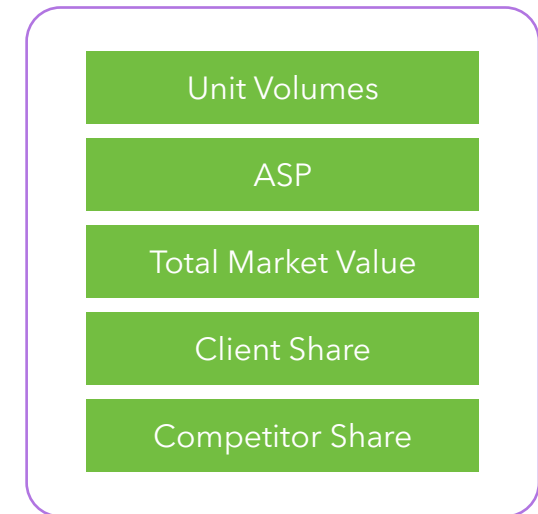
Data Sources



Market Model



Output (Tableau dashboard)



Market model methodology

PHASE 1 – National total unit volume

STEPS:

1. Define product list per module and create SKU list
 - Identify products that should be included
 - Work with the client to determine product list
 - Create comprehensive SKU list
2. Extract unit volumes from import data
 - Use SKU lists to extract total units within each module – BrandTrack captures all medical devices coming into the country
3. Obtain detailed tender information
 - National public tender data is obtained quarterly to feed into the model
4. Supplement with additional research* (Optional with Integrated solution)
 - Medical/KOL and industry interviews are conducted

DATE	PRODUCT DESCRIPTION	UNITS	FOB REVENUE
3/1/2020	39184-1640 - H7493918416400 ARTIGO MEDICO PARA IMPLANTE SENDO STENT CORONARIO COM ELUICAO DE EVEROLIMUS PROMUS ELEMENT TM PLUS, DE LIGAS DE ACO INOXIDAVEL(LIGAS DE CROMIO E PLATINA), MONTADO NUM SISTEMA INTRODUTOR MONORAIL UTILIZADO PARA MELHORAR DIA	12	\$634
3/1/2020	39251-1640 - H7493925116400 SISTEMA DE STENT CORONARIO DE CROMO E PLATINA COM ELUICAO DE EVEROLIMUS - STENT FARMACOLOGICO CORONARIANO IMPLANTAVEL PARA ANGIOPLAS IA CORONARIANA - 16 X 4.00 TEMPERATURA 15 C A 25 C REG ANVISA: 10341350771 VALIDADE: 11/0	9	\$1,150
3/1/2020	39251-2022 - H7493925120220 SISTEMA DE STENT CORONARIO DE CROMO E PLATINA COM ELUICAO DE EVEROLIMUS - STENT FARMACOLOGICO CORONARIANO IMPLANTAVEL PARA ANGIOPLAS IA CORONARIANA - 20 X 2.25 TEMPERATURA 15 C A 25 C REG ANVISA: 10341350771 VALIDADE: 11/0	14	\$1,789
3/1/2020	RONYX30034X - Resolute Onyx stent coronario troca rapida comp 34mm diam 3mm - NOMENCLATURA COMPLEMENTAR NECESSARIA: "Implantes expansiveis, de aco inoxidavel e de cromo cobalto, para dilatar arterias 'Stents' " - UPN: 00763000019242 - PRODUTO NOVO, O	20	\$3,536
3/1/2020	RONYX30038X - Resolute Onyx stent coronario troca rapida comp 38mm diam 3mm - NOMENCLATURA COMPLEMENTAR NECESSARIA: "Implantes expansiveis, de aco inoxidavel e de cromo cobalto, para dilatar arterias 'Stents' " - UPN: 00763000019259 - PRODUTO NOVO, O	24	\$4,257
3/1/2020	RONYX35008X - Resolute Onyx stent coronario troca rapida comp 8mm diam 3,5mm - NOMENCLATURA COMPLEMENTAR NECESSARIA: " Implantes expansiveis, de aco inoxidavel e de cromo cobalto, para dilatar arterias 'Stents' " - UPN: 00763000019266 - PRODUTO NOVO,	9	\$1,563
3/1/2020	MTR45008 - SISTEMA DE STENT CORONARIO DE ELUICAO DE SIROLIMUS METAFOR 4.50X08MM - FORMA DE ESTERILIZACAO: OXIDO DE ETILENO - NOME TECNICO: STENT PARA ARTERIAS CORONARIAS - REGISTRO MS.: 10360810031 - DATA DE VALIDADE DO REGISTRO: 03.07.2027 LOTE: MD9	1	\$140
3/1/2020	MTR45024 - SISTEMA DE STENT CORONARIO DE ELUICAO DE SIROLIMUS METAFOR - 4.50X24MM - FORMA DE ESTERILIZACAO: OXIDO DE ETILENO- NOME TECNICO: STENT PARA ARTERIAS CORONARIAS - REGISTRO MS.: 10360810031 - DATA DE VALIDADE DO REGISTRO: 03/07/2027 LOTE: MF1	1	\$140

Market model methodology

PHASE 2 – Competitor share split

STEPS:

1. Use SKU-level BrandTrack output to determine competitor splits
 - Market owners to verify competitor splits using outputs from interviews as well as existing market knowledge and secondary market research.
2. Fill in gaps in share from local manufacturers (Optional with Integrated solution)
 - Tender information is analyzed along with Medical/KOL interviews, and industry interviews to identify and fill in any gaps within import data.



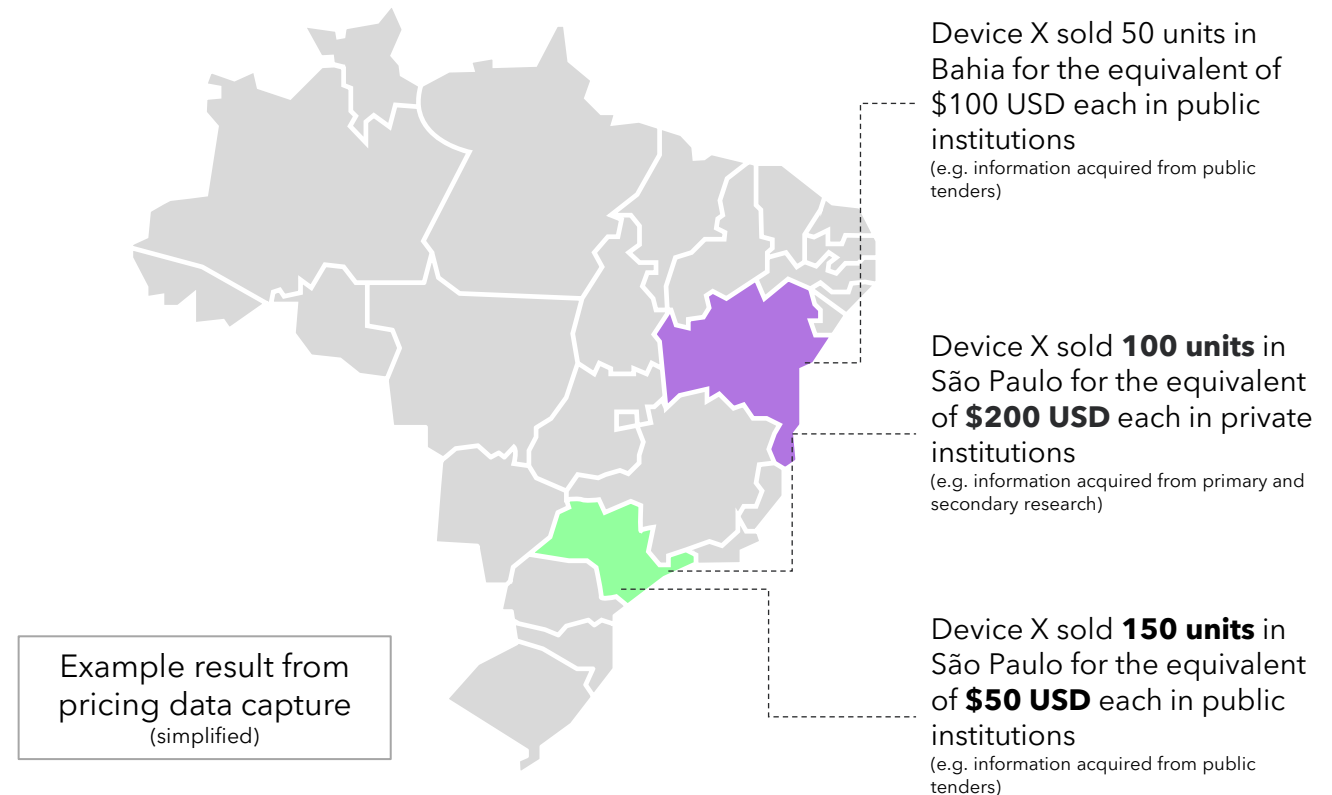
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Market model methodology

PHASE 3 – Determine Average Sales Price (Integrated solution output)

STEPS:

1. Mine tender information for pricing data
 - Ensure that all products on previously created lists are included when harvesting tender information
 - Map pricing data from tender Information to these lists to determine real-world ASP
2. Confirm ASPs
 - Clarivate market owners will use existing market knowledge, secondary market research, and information from Medical/KOL and Industry interviews to confirm pricing data and finalize ASP for each product
3. Monitor changes in ASP
 - Interviews will be conducted quarterly to monitor changes in ASP on a quarterly basis
 - Tender information will be harvested quarterly to inform and validate trends



$$\text{ASP}_{\text{for Device X}} = \frac{(150 \text{ units in Sao Paulo public} * \$50 \text{ USD} + 100 \text{ units in Sao Paulo private} * 200 \text{ USD} + 50 \text{ units in Bahia public} * \$100 \text{ USD})}{(150 \text{ units} + 100 \text{ units} + 50 \text{ units})} = \frac{\$32,500 \text{ USD}}{300 \text{ units}}$$

Example ASP calculation
(using example pricing data capture above)

$$\text{ASP}_{\text{for Device X}} = \$108.33 \text{ USD}$$

Market model methodology

PHASE 4 - Calculate market value and share*

STEPS:

1. Calculate market value using previously determined metrics
 - Market value = units * ASP
 - Market value will be presented in USD using an average exchange rate for the year
 - Clarivate market owners will confirm market value using existing market knowledge, secondary market research, and data from other Clarivate products where relevant
2. Calculate client and competitor market share
 - Market revenue share will be calculated using product and brand-specific ASPs as determined in Methodology Step 3 and manufacturer unit share as determined in Methodology Step 2
 - Manufacturer market share will be updated on a quarterly basis as BrandTrack data is received and refreshed
 - Trends in market share will be validated in quarterly interviews

BRA	Product Type Tympanostomy Tube Material Fluoroplas	2020	Units Sold	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Fluoroplas	2021	Units Sold	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Fluoroplas	Seasonality	Units Sold	27.27%	28.60%	21.44%	22.69%
BRA	Product Type Tympanostomy Tube Material Silicone	2020	Units Sold	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Silicone	2021	Units Sold	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Silicone	Seasonality	Units Sold	28.71%	25.93%	22.71%	22.64%
BRA	Product Type Tympanostomy Tube Material Titanium	2020	Units Sold	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Titanium	2021	Units Sold	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Titanium	Seasonality	Units Sold	17.54%	16.91%	32.42%	33.13%
BRA	Product Type Tympanostomy Tube Material Fluoroplas	2020	Market Value	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Fluoroplas	2021	Market Value	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Fluoroplas	Seasonality	Market Value	27.38%	28.90%	21.24%	22.47%
BRA	Product Type Tympanostomy Tube Material Silicone	2020	Market Value	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Silicone	2021	Market Value	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Silicone	Seasonality	Market Value	28.42%	27.78%	21.00%	22.81%
BRA	Product Type Tympanostomy Tube Material Titanium	2020	Market Value	0.00%	0.00%	0.00%	0.00%
BRA	Product Type Tympanostomy Tube Material Titanium	2021	Market Value	0.00%	0.00%	0.00%	0.00%



Resources

Deliverables, Timeline, Investment

Deliverable & data access



- **Tableau dashboard made available with enterprise-wide access.**
- **Information is updated every quarter.**
- You will receive 4 updates with your annual tracking.
- Historical data (starting 2018) is included.
- Updates are released 8 weeks after the close of the quarter.
- **Data is validated and corroborated with you to ensure alignment and team buy-in.**

Why subscribe to BrandTrack?

Real world data to track performance, on your terms.



Single Source Of Truth

- Regional coverage
- Independent, third-party analysis
- Consistent methodology applied to all countries



Best-In-Class Sources

- Visibility on imported products and national brands
 - Import data
 - Local tenders
 - ASPs
 - Interviews with KOLs, medical professionals, and industry insiders



Healthcare focus

- Industry experts dedicated to healthcare markets
 - Medical devices
 - Capital equipment
 - Consumables
 - Pharmaceuticals
- 400+ categories covered



Curated Visualizations

- Visibility into all players
- Drill down to specific equipment models or SKU
- Tailor the visualization to how you measure the market
- Enterprise-wide access
- Historic data included

Annual investment

Per module

MODULE	BRAZIL	COLOMBIA	ARGENTINA	CHILE
INTEGRATED SOLUTION - Imports + Tender analysis + Interviews - Multinational + Domestic players - Units - Revenue (Sell-out, ASP US\$)	\$18,000	\$12,000	\$12,000	\$12,000
IMPORTS SOLUTION - Imports only - Units - Revenue (FOB US\$)	\$15,000	\$9,000	\$9,000	\$9,000

- Payment structure:
 - 50% at project signoff, 50% at the start of the third quarter of tracking.
- When you are ready to move forward with our offering, an agreement will be sent for signature.
- Work will begin upon receipt of the signed agreement and payment of the initial deposit.



About Clarivate

Clarivate is the leading global information services provider. We connect people and organizations to intelligence they can trust to transform their perspective, their work and our world. Our subscription and technology-based solutions are coupled with deep domain expertise and cover the areas of Academia & Government, Life Sciences & Healthcare and Intellectual Property. For more information, please visit clarivate.com

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