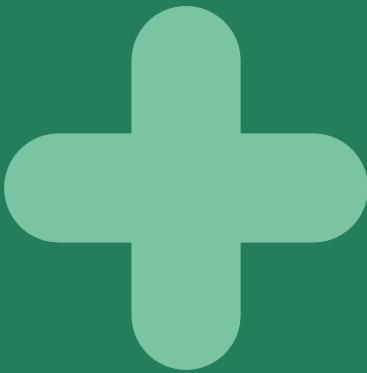


Q3 · 2022

Mexico

**Back to the Future
of Health
Part 2**





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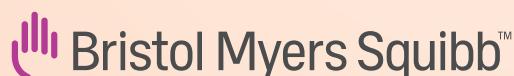
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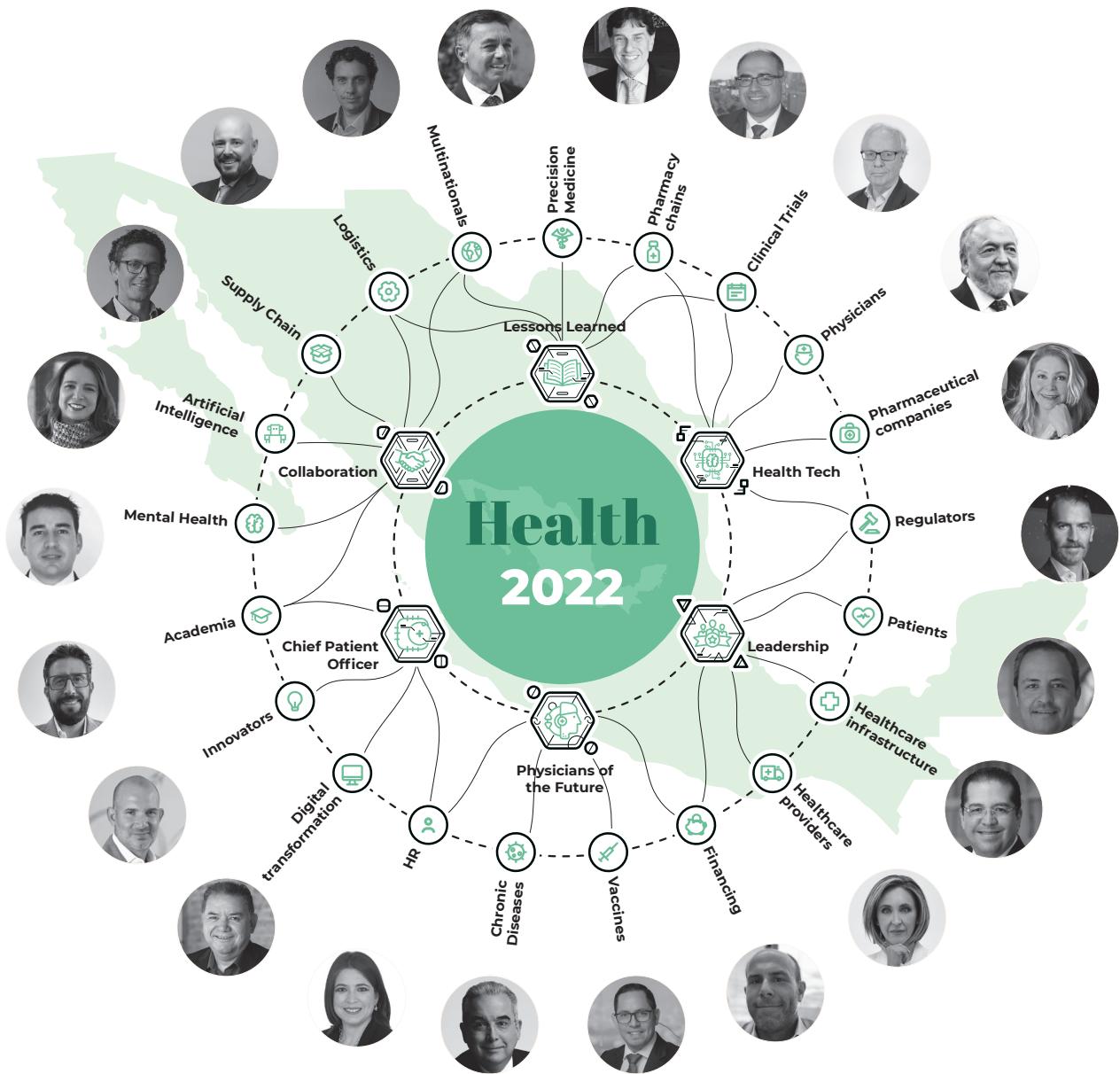


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Back to the Future of Health.

Part II

Distilling lessons learned to reinvent a sustainable healthcare system.

Health expenditure in Mexico is at its highest after the pandemic. Now is the time to advance in creating a new healthcare model, one which allows sustainable growth. According to **Cristobal Thompson, Executive Director of AMIIF**, “Innovation only makes sense when it reaches the general population”. Thompson believes that to be better prepared for the future, more critical thinkers are need to strengthen country planning in logistics and management systems.

Fernando Cruz, President of Novartis Mexico shares, “Life expectancy is increasing in Mexico, and we must be attentive to the possibility of an inverted population pyramid. 70% of the budget will be allocated to non-communicable diseases because of untreated conditions during COVID-19. Last January, the Ministry of Economy and Novartis México signed a Memorandum of Understanding for Economic Reactivation and Health Promotion

and Investment in Mexico. The collaboration of shared objectives will foster and strengthen the cooperation between both parties, and includes a 50 million dollar investment, to benefit the health of all Mexicans. “Non-public healthcare systems can’t deal with the current situation alone; we need public-private partnerships and get creative addressing health challenges. A preventive approach to primary care is essential” concludes Cruz.

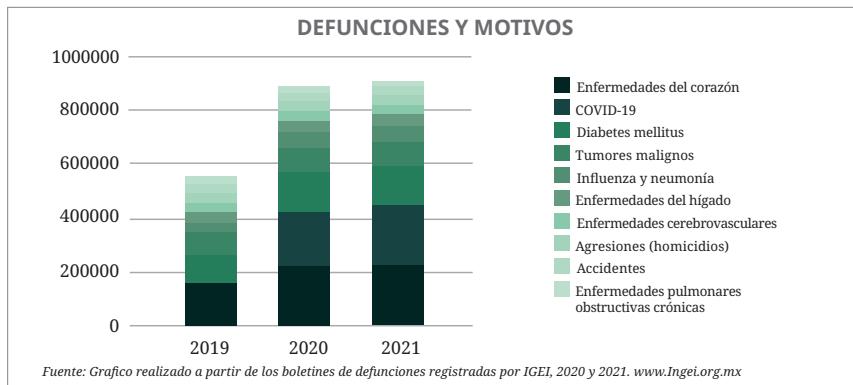
During the Innovation Week, **Rodrigo Ruiz, President of AMIIF and General Manager of Stendhal Pharmaceuticals**, highlighted that “as an industry, we have learned of the power of alliances and confirmed that the future of healthcare lies in working hand in hand with technology.”

Since 2020, as a result from allocating resources to address the pandemic, the incidence of chronic diseases has risen. As a result of this,



we are witnessing in 2022 a financial impact on the healthcare system, but more importantly, a delay in patient treatment. Now we are better prepared to design a healthcare model that capitalizes on the lessons learned from recent years. A study by **America's Health Foundation** on the impact of COVID on cancer attention in Latin America concludes that health systems are not prepared to cope with the demand in terms of budgets, healthcare professionals, and specialized centers. In Mexico alone, 473 thousand people have been negatively impacted due to the delays of treatments. Over the past two years, cancer care has significantly reduced: 74% in surgeries, 65% in chemotherapy, and 60% in diagnostics. Public policies, support programs and specific strategies must be created to better prepare for future crises. Healthcare must focus on non-communicable diseases, accurate and early diagnosis, and treatments to tackle shortage and a non-optimized distribution of health resources.

Various players in the sector have taken on the role of relevant enablers of change, investing in technology and accelerating innovation. They share a message of resilience and flexibility, whilst also enabling and empowering each country to adapt to the needs of each market. The most important lessons learned were flexibility and the provision of personalized patient solutions to reach patients in both the public and private sectors.



LEADING IN NEUROSCIENCE

Biogen is a biotech company, pioneer, and leader in neuroscience, that discovers, develops, and delivers innovative therapies to people living with complex neurological diseases around the world.

We believe that no other area of medicine has more unmet needs than neurology and, with great passion and perseverance, we have brought treatments to patients that change the course of diseases such as Multiple Sclerosis, Spinal Muscular Atrophy and recently, Alzheimer's.

In Mexico, we have plans to continue growing, ensuring that more patients with these diseases can improve their quality of life. We are Biogen, where science meets humanity.



HEALTH AS THE MUSCLE FOR ECONOMIC REACTIVATION



Innovation is Value / Wealth

Innovation has been the common denominator in running companies. Not only in the formulation of molecules, but also in company processes, teams, business models, collaborations, digitalization, and technology. The sectors continues to search for solutions to assist governments to manage their population's health more efficiently. The implementation of such innovative solutions aims to produce better results, benefits, and solutions at a lower cost, improving access to primary care and obtaining greater value from resources. The digitalization of processes proves to be time efficient, and the application of artificial intelligence, whilst limited, improves administrative tasks, diagnostics, treatments, and surgeries. It is of integral importance to find the funds to support these innovative solutions.



Hector Orellana, VP for North Latam of Medtronic shares: "Our priority is to increase access for patients using innovative technology for diagnosis and treatments. We have learned to be flexible and adapt to a new environment, with Medtronic becoming a technology and access enabler." Medtronic is an ally of both the public and private sectors providing adequate treatment to patients of both systems to benefit from technology. "Collaboration and technology are key factors for better outcomes for more patients," **Orellana** concludes.

Mauricio Guizar, Director General of Biogen, aims "to leverage digital tools to bring easy diagnosis options and benefits to the Mexican population, especially older patients for whom accessing treatment is most challenging." Pioneering in neuroscience, multiple sclerosis, spinal muscular atrophy, and more recently Alzheimer's, Biogen, a Med-Tech company, brings innovation to Mexico. Mauricio also believes that "part of our responsibility as a pharmaceutical company is to provide a solution for patients to receive their medicine, and we do this through supporting physicians." Solutions such as digital tools to ease virtual consultations is one of the ways to help.



Alejandro Paolini, Managing Director for Mexico, Central America & the Caribbean, Siemens Healthineers, Mexico, notes, "Artificial Intelligence helps physicians make better informed and personalized decisions to focus on patient treatment. Physicians will always be the decision-makers. The objective of using technology is to restore personalized patient care and reduce administrative tasks, solve challenging problems and make the industry more sustainable."



B. Braun Mexico General Director Carlos Jimenez believes "we need a less fragmented healthcare system focusing on evidence-based treatment with a result-oriented payment. Embracing technology will enable dynamic regulation to make patients more active in the treatment." **B. Braun** is a medical and pharmaceutical device company with a worldwide strategy to digitalize, to develop efficiency, products, and solutions. **Jimenez** believes that a "strong collaboration between our system suppliers, hospital and healthcare professionals, and insurance companies formed a transparent platform to work together for the healthcare system. We have a contingent of very hard-working and competent teammates."





BMS Mexico elaborates on their position in the market. “we are dedicated to supporting therapies in oncology, hematology, immunology, and cardiovascular. The strategic priority has been to ensure access and availability of medicines to patients, we work with our logistics team to avoid stockouts, and we are proud to have achieved it. From the point of view of access, we work on three elements:

Innovation systems: seeking to offer new therapies and medicines. Integrated and collaborative work between different actors of the system.

Clinical research: we support access programs.

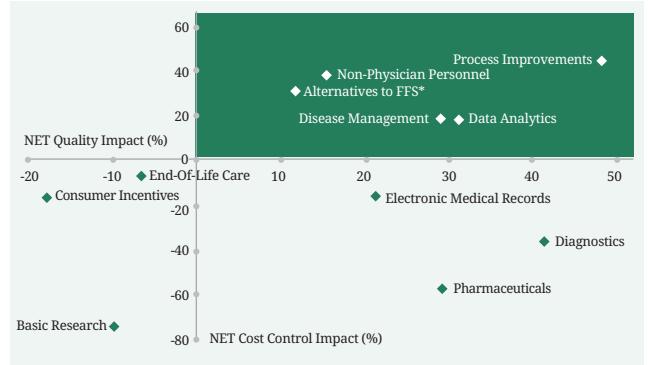
“We are convinced that “disease prevention” is key for health systems to allow more patients to access medicines. Research and development (R&D) is a strategic pillar of BMS and reaffirms our responsibility to patients. During the last five years we have invested more than \$60 million in R&D in Mexico to benefit more patients with innovative treatments. We have a great team of people dedicated to R&D and it is a priority for both our organization and Mexico to continue investing in these areas,” shares BMS Mexico.



Fujifilm is a global player specializing in diagnostic imaging. **Enrique Giraud**, the **Managing Director for Mexico**, shares his take on Artificial Intelligence, “AI technology has helped achieve a precise and quicker diagnosis. Once doctors learn to leverage AI, they realize it won’t replace them but help them become more productive and efficient.” **Fujifilm** is entering the nanotechnology market. **Javier Giraud**, the **Medical Systems Manager**, observes, “mobile devices are built with an inbuilt Covid detector –only possible, due to AI- and act as a support to doctors and technicians. We also have Covid, influenza, and other tests on the market.” Fujifilm was one of the first companies to



OPPORTUNITIES FOR INNOVATION



Notes: Axes show net positive (percentage positive minus percentage negative).
*FFS is Fee for Service

Source: Harvard Business School, Forum on Healthcare innovation <https://www.hbs.edu/healthcare/Documents/Forum-on-Healthcare-Innovation-5-Imperatives.pdf>

produce the PCR tests for Covid three years ago, supplying tests throughout Europe and other countries worldwide. Fujifilm has created new products and technologies, combining existing technologies with new acquisitions.



Mariano Rozada, who took over as **Head of Upper Latam and GM of Glenmark Mexico** at the beginning of 2021, shares his experience, “digitalization allows for better analysis and segmentation of medical teams in order to develop stronger work strategies.” Rozada concludes, “since the pandemic, the health sector and its investment in R&D have played a leading role, and the progress achieved will help economies to get back on track.”

Medtronic Engineering the extraordinary



Medtronic Mexico develops innovative technology solutions applied to health care for the most complex and challenging diseases. We inspire hope and new possibilities in people around the world.

We propose to take the health of people in Mexico to another level, comparable to the best Health Care models in the world, through innovation, medical technology integration and the joint work of public and private sectors.

2 patients

are touched by our medical technologies in the world, every second.

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years
of solid presence
in Mexico

+70
redesigned
treatments to treat
the most complex
and challenging
diseases

4
manufacturing
plants

+13,000
employees in the
country

310
million units
produced in Mexico
and exported
worldwide



A NEW GENERATION OF LEADERS

READ PART 1



Spurred by the digital wave, COVID accelerated the implementation of digital tools and teams that drive new business models. The leaders have shown new qualities such as agility and decision-making in a challenging scenario, the importance of a human approach marked by transparent communication, and the ability to build hybrid, inclusive and connected teams. Executive Forecast shares the opinions on leadership experiences in the Mexican sphere during and post-pandemic.

»» BMS Mexico

“We are an agent of change in this new process. To advance in adversity and unexpected moments, we have four strategic pillars:

i. innovation, ii. Access, iii. Digital transformation, iv. Engagement of our employees. Digital transformation is a strategic pillar because beyond the pandemic there continues to be changes and challenges in healthcare systems, companies, and the methods of working with the medical community in the various interests of the public.”



»» Mariano Rozada, Head Upper Latam & Country Manger - Glenmark México

“Communication plays a big role in my leadership style. When we hire new people for the company, we look for flexibility and a capacity to adapt. An entrepreneurship background covers a broad spectrum and comes with a dynamic mind, open to new challenges.”



»» Héctor Orellana, VP North Latam - Medtronic

“The team has learned how to manage uncertainty, move quickly and decisively, take advantage of opportunities, acting boldly and competitively in the market, all of which provide better access to patients. Regarding doctors, we must deploy resources to get better solutions and access for the patients. Digitalization is happening; the systems

learn to redeploy the limited resources in the best way possible because we need to be wiser with our resources.”



»» Fernando Fogarín, Director General - Organon

“I understood and learned from the pandemic that no challenge is too great, and that achieving goals is a combination of will power and the noble purpose that guides us. At Organon, we had the complexity of launching the company on a virtual stage and during the pandemic.”



»» Mauricio Guízar, General Manager México - Biogen

“I aim to bring change to the health sector and support patients in having more treatment options. I want to be remembered for having gained access to treatment for all patients, as a person who advocated for my people's development, supporting and coaching them to be the best version of themselves.”



»» Fabiola Trigueros, CEO-Smart Scale

“A business can be built and developed with the right people who believe in their leader's dreams and objectives and the right knowledge and capacities. With the right partnerships, people and mindset, success is assured. Great things can happen when people are prepared to learn,

stay alert and focused, and be innovative and consistent.”



»» Luisa Suarez, CEO - VitalMex

“A leader must develop necessary skills, not so much technical knowledge but in management skills. Knowing how to create a strategy and being close to an expert team to motivate and inspire them. People need guidance, inspiration, and motivation to be committed in the face of a crisis. Vital Mex leaders focused on managing virtual interaction, working on human contact, and the spontaneity of face-to-face communication.”



»» Jorge Torres, VP - FedEx Express Mexico

“Fed-Ex leadership and management style is standing shoulder to shoulder with the staff, being with the people daily, regardless.”



»» Carlos Jiménez, Director General Mexico - B. Braun

“Leaders must manage all aspects of the business and establish a learning culture to motivate the teams. We have to increase the healthcare channeled revenue without increasing the cost of medication for patients to benefit from a sustainable and efficient supply chain.”

WE KEEP GROWING

For more than 45 years in Gelpharma & Vitae Laboratories we have worked under the highest standards in the industry, developing innovative products and improving the quality of life.

As part of our strategy we have expanded our therapeutic portfolio and increased our production capacity by incorporating new lines and production plants, always seeking to maintain competitiveness at a local and global level. We have also specialized in the launching of cutting-edge medicines, following up on all the necessary stages, from research and development to distribution and exhibition in the different sales channels.

Thanks to the market response to our products, we will continue to innovate in different pharmaceutical forms, such as liquid capsules. An innovative alternative within the reach of the population, with greater acceptance due to its safety, easy swallowing, speed of action and other benefits, that allow to widely meet the patient's needs.

Likewise, with the support of our commercial partners, we have been able to establish a wide distribution network and points of sale throughout the country, always seeking timely attention to the needs of the population. Through communication with the different sales channels and understanding the challenges/opportunities that arise in each one, we have integrated a unique portfolio of OTC/Rx and high specialty medicines, with which we will seek to be closer to patients and their health needs.

Our greatest strength will continue to be customer service, adapting to our customers' requirements in a timely manner; in the short term, our goal is to position ourselves as leaders in the domestic pharmaceutical industry, and to accelerate the export process of our main brands in the United States and South America, taking advantage of our experience and knowledge.

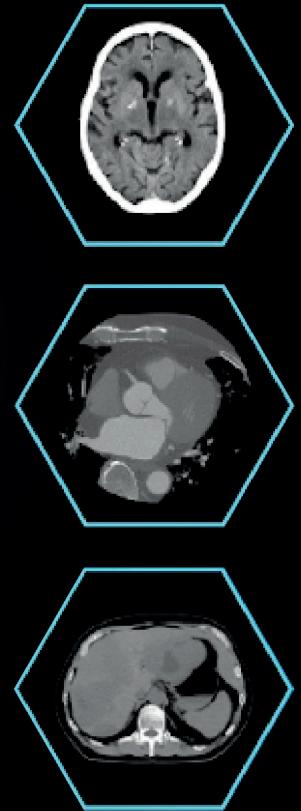


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IPV is an abbreviation for Iterative Progressive reconstruction with visual modeling.*



STORIES OF VALUE



Logistics for Increasing Value



One of the lessons of the pandemic was of the necessity and relevance of logistics. “We have learned that logistics contribute to the competitiveness of any economy, without excluding Mexico. 67% of Mexico’s GDP depends on international trade.” Shares **Jorge Torres**, Vice President, FedEx Express Mexico



Technology for Increasing Value



Health is now relevant and a priority on the public agenda, and the value of access to healthcare and innovation is unquestionable. “The possibilities that technology offers today are incredible; they allow us to receive and process information and provide virtual training. Health professionals are challenged to adapt and feel comfortable with the new tools we offer. We see that technology adoption can vary depending on the generation, and the responsibility of surgeon training is a crucial element to our success in securing access.” **Hector Orellana**, VP of Medtronic for North Latam.



Collaborations for Increasing Value



“We all have the same goal – attend the patients; the government is responsible for establishing rules and regulations; taxpayers for contributing resources, and the physicians for diagnosing and treating patients. The responsibility of patients is to take care of themselves and raise their voice so that the health system attends their needs.” **Mauricio Guizar**, Biogen



“We must bring value to the conversation. The individual cost of treatment of patients with rare diseases continues to be a major barrier for payers as they do not understand the value that innovation brings to the field of rare diseases. Rare diseases are mostly of genetic origin, affecting families and are usually progressive and debilitating. The patient could need special professional assistance.” **Nicolás Linares**, General Manager Ultragenyx Mexico

2022



“A year to consolidate, normalize and restructure the health sector, embrace the private sector and be focused on chronic and non-communicable diseases such as diabetes or heart disease, among others.” **Carlos Jimenez**, BBraun



“2022 will be the year of adoption of the hybrid model of interaction between the healthcare system, and patients, creating a balance between the analog and digital world, with focus on what is best for our patients.” **Mauricio Guizar**, Biogen



“2022 will be the year when patients prioritize their treatments again. It will be a joint effort between governments, healthcare providers and other industry stakeholders to bring people back to healthcare” reflects **Fernando Fogarín**, CEO of Organon Mexico.



PRIORITIZING HEALTH RESOURCES

Self-sufficiency is a priority for Mexico. Regional collaborations are key in developing innovative technologies. The government must develop strategies to bring local and national companies together to develop biosimilars, monoclonal antibodies, recombinant vaccines, and other products to address the neglected needs of the region. The manufacturing of the AstraZeneca vaccine is a clear example of international cooperation.

Luis Verduzco Koloff, **Gelpharma** showcases the importance of local production in Mexico, “our local population will always be our priority – it is the main purpose of our existence. We want to position ourselves as leaders in the national industry, expand our product portfolio, and innovate with our products and therapies”. Jalisco supplies many products consumed nationwide in both the public and private sectors, and **Gelpharma** has identified supply chains and linked the market needs of both sectors. “Guadalajara has the potential to continue growing as a cluster. We are eager to receive new players interested in generating employee commitment and value from actively participating in the supply chain – not bringing a finished product from outside. Interest in Mexico has increased post-pandemic due to the

population’s profile and ailments, making it an attractive proposition. In the medium term, we have to manage the population’s needs through products manufactured in Mexico.”



Christus Mugerza is one of the most robust health systems of Mexico, with hospitals, care centers, nursing schools, an ambulance system, and other healthcare services for Mexicans. **Horacio Garza Ghió**, General Director of Christus Mugerza, shares with us, “there are three main problems to solve in a society: health, education, and security. Health is a priority because the other two cannot be achieved without it.”



Liomont, a Latin American regional player, considers preparedness essential for Latam because it means self-sufficiency in health. **Alfredo Rimoch** maintains, “being prepared requires planning; investment in R&D and technology, and collaboration between the public and private sectors.” He also believes the government must acknowledge the importance of local industry and work with local companies. “We need robust and harmonized regulatory agencies with international standards and regional collaborations. The technology transfer and manufacturing of the AstraZeneca vaccine is an example of international collaboration. Technology has brought us together, and this model could be used to develop other products significant to our region.

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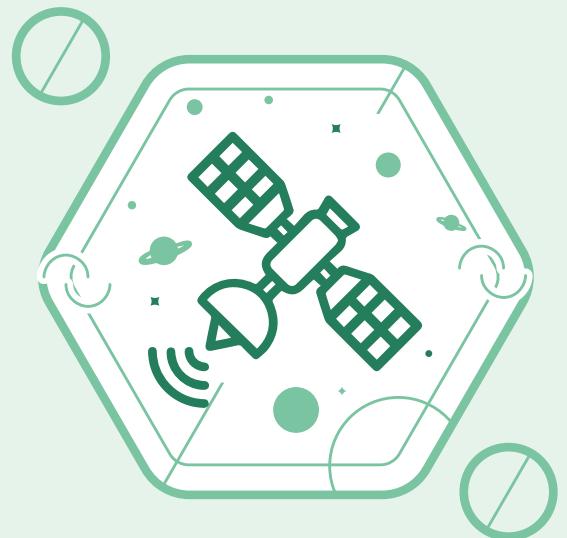
Línea Dermatológica

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SATELLITE INTERVIEWS

Illustrating the perspective of the industry that will inspire business leaders in their decision making process.





Carlos Jimenez

General Manager
B. Braun Mexico

EF: 2020 was a year of diagnostics and 2021 vaccination. What do you think 2022 will be the year of?

CJ: This should be a year to consolidate, normalize and restructure the healthcare sector by accommodating the private sector, and focusing on chronic and noncommunicable diseases such as diabetes or cardiac deceases, among others. In this quest engulfed by financial constraints due to the inability to maintain profits because of spiked operational cost, we are still on course in digitalizing our operations by introduction of artificial intelligence to implement new solutions. First steps to doing investments for the future of healthcare.

EF: How is the portfolio translated into Mexico and how is this allocated between public and private?

CJ: Currently, on our global market, we are offering around 3,000 of 5,000 product lines in Mexico, e.g., the stems of our new launched core hip, which is then a group of around about 70 implants. We have managed this despite the fact that launching a new product may take two years, a challenge that we're dealing with. It's a dynamic industry because 30% of the sales in medical devices come from products launched worldwide within the last five years. My hope is that we become a market more open to affordable modern solutions with much better results beside the product cost is a bit more expensive

EF: On your 30th anniversary, what message will you share about your role in Mexico?

CJ: We've grown exponentially over the last 15 years, and are one of the most highly flexible innovative company in medical devices and injectable drug solutions. We strive to offer financial models to suit each customer, and be a company that's easy to do business with. We are offering rental concept, have a fleet management concept and

running the logistical parts payable in monthly fees by hospitals. We have a contingent of very competent teammates that define hard work and team work in the same sentence.

EF: Do you think we will see an implementation on digital health-care in Mexico?

CJ: First change, we need the segmentation of the public section of public market canceled, we need a less fragment healthcare system leading to evidence-based treatment, while having a result-oriented payment. Insurance companies are making profits at the expense of patients, a wrong way to conduct healthcare services. We need the segmentation of the public health to change, and the founding system in Mexico for private to be more evidence and result based. It's important to separate powers so that you can allocate maximum concentration on one aspect and maintain a competitive and quality-oriented status.





Efren Ocampo

Presidente y Director Ejecutivo
GRUPO NEOLPHARMA



XXX



EF: ¿Cuál es la clave para conseguir el financiamiento para proyectos de inversión en salud?

EO: Hemos crecido orgánicamente y reinvertimos nuestras utilidades. Somos una empresa familiar austera, los tres hijos (del fundador) participan activamente en la empresa y en su evolución. Tenemos un gobierno corporativo y administrativo sólido, una empresa que da dividendos en inversión en la salud. Tenemos la capacidad para generar riqueza, y cuando nos visitan las entidades prestadoras estoy orgulloso de la infraestructura de vanguardia que poseemos. Todos estos elementos y nuestro crecimiento -en los últimos 4 años hemos tenido crecimiento constante por encima de dos

dígitos- permite que podamos aliarnos con una financiera de talla mundial como es la IFC. Nuestra capacidad administrativa, niveles de productividad y de competitividad son un paquete atractivo para avanzar con éxito. Dentro de su clasificación nos consideran una empresa estratégica. Salimos airoso de la solicitud porque cumplimos con conceptos de género e inclusión y de cuidado al medioambiente. Existe una larga historia en la empresa de la importancia que le otorgamos al tema de género, mi esposa es doctora y ha fundado una maestría en el tema y quiere fundar un doctorado en estudios de la mujer. Esto está reflejado en nuestra planta donde el 50% de nuestros empleados son mujeres. También nos ocupamos del medioambiente, minimizando nuestros impactos negativos. Sin duda, nuestra mayor aportación en temas de sustentabilidad es la de traer opciones terapéuticas accesibles a poblaciones vulnerables que anteriormente se veían limitadas en estos temas.

EF: ¿Desde una perspectiva de capacidad manufacturera, ¿cómo ves el futuro del sector salud en México?

EO: En la búsqueda de la salud universal, el sector de salud mexicano está en el proceso de readecuarse. La salud universal significa que toda la población no vinculada a los servicios de Seguro Social, ISSSTE y otras entidades puedan tener cobertura. El total del mercado se incrementará y será necesario actualizar las guías terapéuticas, incorporando medicamentos que tienen un mayor beneficio para el paciente. Sin embargo, el presupuesto no alcanza para comprar medicamentos para toda la población. Veo a futuro una plataforma de buenas expectativas, aunque como empresario creo que los cambios en el entorno regulatorio y las dinámicas de mercado suponen retos adicionales para lograr el cometido de cobertura universal. El mercado en México necesita certidumbre y bases estables para que el sector avance. Los compromisos que tomamos suelen ser a largo plazo y debemos contar con claridad en las reglas del juego para cumplir nuestros compromisos.



Fernando Cruz

Country President
NOVARTIS Mexico



EF: What would be your message to world leaders regarding health priorities at Davos 2022?

FC: First, we've learnt the importance of prioritizing health as a result of the pandemic. It's no longer a futile topic, and therefore serves on the high table as other health agendas. With an increasing life expectancy of 82, 83 years in Mexico, there is need to be vigilant and attentive to the possibility of an inverted population pyramid, meaning more than 70% of the budget will be allocated to non-communicable diseases, spelling disaster in the healthcare sector. We need to have public-private partnerships, be more creative, more inventive in ways that are transparent to address these health challenges since nonpublic healthcare systems can't deal with these by themselves.

EF: What is Mexico's contribution to the portfolio performance of Novartis?

FC: We've been growing at an average of 5-6% over the last year to be at the top 20 market. Oncology grew double digits around 25%, 22% for our generics and biosimilars division and are innovative medicines pharma grew around 10%. Business has been booming despite being in a difficult year. We are a top 1 market globally, contributing \$26-\$30 billion to our global turnover. Mexico leads in public-private partnerships all over Latin America, helping address the most pressing health economy challenges, with an end-goal of uplifting the wellbeing of people, levels of productivity and competitiveness. Mexico lays a footprint of 800 employees out of 1800, who provide high added value services and operations from Argentina all the way to Canada, including the US, our largest market.

EF: Could you elaborate on the clinical trials and trends observed in Mexico today?

FC: Mexico has a great environment to become clinical trials hub for the region. Mexican Institute of Social Security covers over 60 million people, the largest payer in the Latin American region, you patients, scientists, healthcare professionals there in the system who are eager to participate in clinical trials. With companies like Novartis investing \$50 million for clinical trials, we're advocating to transform the ecosystem and landscape in Mexico by improving the regulatory environment for clinical trials. We will do 60-70 clinical trials as stipulated in the MOU we had, compared to last year's 50 due to the pandemic. Having set pace, we're inviting other companies to feel enthusiastic and pounce on the idea of partnering with us and the government to bring more investments that we allocate globally for clinical trials.





Jorge Torres

Vicepresidente
FedEx Express México

“Transit times are measured in days, and commitment time is measured in hours. For us, precision is more important than speed.”

EF: What was the role of FedEx during the pandemic?

JT: *Due to our role of transporting crucial products, we were enlisted as an essential activity and given the opportunity to continue with our operations. The pandemic in Mexico called for the categorization of activities that were either essential or not, with about 93% of the economic activities being classified as non-essential. We were part the 7% of privileged sectors confirmed as essential and permitted to continue. Almost 9,000 people worked diligently, enthusiastically, and punctually every single day during the last two years, including weekends on personal terms. We have a true commitment to the community that we serve.*

Our people were heroes, they delivered important products to families in-need. We were able to also transport more than 600 mechanical ventilators from the US into Mexico across 12 flights.

EF: Did you introduce new KPIs before and after the pandemic?

JT: *Absolutely. In logistics, we have hundreds of KPIs. We are inherently dependent on efficiency and productivity; therefore, everything is measured. Transit times are measured in days, and commitment time*

is measured in hours. For us, precision is more important than speed.

EF: How do you see collaborations in Mexico happening?

JT: *Collaboration is essential, it can be directly compared to logistics. Without collaboration, things do not get done. FedEx express covers 100% of Mexican zip codes, that is 35,000 zip codes across 32 states. Coverage, reliability, and speed are crucial factors when connecting companies and products across the country in its entirety. Regarding healthcare, it is not only the development of a cure or treatment, but also the connectivity and infrastructure that is of great importance to successfully have it delivered to the patient on time.*

EF: How would you like to be remembered for in five years?

JT: *I like to work with people. I like to talk to them and be in their minds, in their hearts and their souls. When I think about my team of 9,000 people, I think about 9,000 families. We all have a shared responsibility of working, doing the best we can to the best of our abilities to ensure the wellbeing of families. We not only want to provide them with a job, but a vision of development career, and growth opportunities. They are the ones who have the privilege and opportunity to serve others. That's the type of mindset that I have with them. I have offered them a school of thought, "It depends on me. It's my turn." When we do that collectively, then we become a great organization. FedEx express in Mexico has been recognized as a great place to work for 19 consecutive years. For me, it is an honour to receive this award, as all our 9,000 employees are surveyed yearly.*

The privilege of the opportunity that history gives us, prepares us not to confront the future, but to define the future. We have the capacity to adapt to a new reality and still be successful, delivering what is expected of us. All of what we have learned the hard way is preparing us for the future, not to confront it, but to build and define the future for us.



Nicolás Linares

General Manager
Ultragenyx Mexico

EF: What is your perspective on the advancements that are being made in rare diseases in terms of approval?

NL: *There is very exciting news. The FDA announced a program to handle medicines for rare diseases. This announcement will be a fast track for rare diseases, giving us more focus, momentum, and investment. In the near future, 30 or 40% of the medication coming to market in Mexico will be for rare diseases, ultra-high specialty drugs, or new age therapies such as gene or cell therapy. The journey to diagnosis is long, and many pharma companies have not invested in therapeutic solutions because of the small number of patients. The FDA's initiative creates incentives for investments, development, and innovative therapy programs for diseases and for the people who have been without any solution whatsoever; it also highlights the value of innovation and the capacity of the pharma sector. There is the question of how to replicate this initiative in the region and reflect the acceleration in COFEPRIS, using reference agencies that have done a good job evaluating and bringing the therapies quicker to the country with this validation. Funders must then adopt the technologies and bring them to the patients as soon as possible. I hope there will be more attention and focus on our community to replicate solutions and make innovative therapies come sooner to the patients.*

EF: Education is essential for physicians to adopt and absorb rare disease education. How do you see the adoption of digital in the different generations of physicians?

NL: *There are digital trends for physicians, zoom meetings, symposiums, congresses, amongst others. Covid accelerated everything digital, and there was initial excitement with high remote attendance, but we went too far in that area, and now we are returning, at least to a hybrid model. It is a good balance, and physicians can decide whether to attend in person or virtually.*

EF: Considering the hybrid model, how do you maintain the workplace culture with the new model?



NL: *The same way we did with the physicians, many interactions can be digital, operational meetings can be easily done digitally, and it makes sense to continue the trend in sales and KPI follow-ups. But face-to-face is much more productive for discussing strategy and bouncing ideas for the future. In the first scenario, we follow an agenda, but personal interaction is more effective for dynamic meetings where we think, plan, and strategize. Personal interaction is important for both employees and customers. We are very culture-dependent in Mexico, a lot of business is done around food, and we are very interactive with our customers. Recently we traveled to Mexicali to meet a customer for a 30 minutes breakfast, which became a three-and-a-half-hour meeting. We first went over the agenda topics and then started bouncing ideas off each other. Virtually, this customer-building relationship interaction would not have been possible.*



Fernando Fogarín

Managing Director
Organon, Mexico

EF: 2020, everyone was focused on diagnostics, in 2021 it shifted to vaccines. What do you think 2022 should be the year of?

FF: 2022 will be the year of getting patients back to care. It will be a joint effort between governments, healthcare providers, and other stakeholders in the industry to get people back to care. For us working in health care, our main priority should be to bring back people to care. We have decided that on Women's Day on March 8th, as a worldwide initiative, Organon is providing a one-day paid leave to the entire population of workers for Organon to take care of their health. Since in Mexico we are one of the six privileged countries where we have a manufacturing facility, we will be doing it one day before, Monday 7th of March, to minimize the impact in our manufacturing facilities. This initiative will encourage our over 500 employees that work with us here in Organon in Mexico to focus on their health. It's an initiative that is linked to women's aid. We are innovating in this way, and we want other institutions, government, companies, and associations to join this effort of helping people getting back to care.

EF: What is the importance of Organon Mexico to the group?

FF: Organon has presence in more than 140 countries all over the world. We are the biggest company in our field, focusing on providing health care to women in every stage of their lives. We are proud to say that we have an entire product portfolio focused for all the stages of the life in women. The Mexican market for Organon is an important one, we have six manufacturing facilities in the world, one of which is in Mexico that we are manufacturing for Mexico of course. We expect that facility to expand here in Mexico in terms of the volume that we are currently producing; we are currently operating at 35% capacity. In a manufacturing plant, we have a large capacity.

EF: Can you elaborate on the role Organon has in Mexico and initiatives that you are conducting in Mexico?

FF: We have developed an omnichannel strategy for woman's health education with different content depending on the demography of each channel. We have been working on a first agreement that will be put in place within Organon, at a global scale, with UNFPA. We are working with them on educating young women about the importance of women's health. We are also working locally in the community where our manufacturing facility is, to reduce the undesired teen pregnancy rates, which is far above the national rate within Mexico.





Alejandra Muñoz

Healthcare Business Director
3M Mexico



EF: ¿2020 fue un año enfocado al diagnóstico, 2021 a las vacunas, de que tratará el 2022?

AM: 2022 será un año para fortalecer las relaciones con nuestros socios y públicos de interés del sector salud. En lo que se refiere a Covid-19 conviviremos con mayor conocimiento sobre el tema pero con una brecha en la salud muy evidente porque muchas enfermedades crónicas –hoy enfermedades agudas en muchos casos- no han sido atendidas. Será un reto para todos los proveedores de salud y los fabricantes estar en estrecha coordinación entendiendo las necesidades de los proveedores y los requerimientos de los pacientes. La conectividad virtual nos ha dado nuevas percepciones y nos obliga a reinventarnos digitalmente, construir plataformas para estar más comunicados, trabajar en salud basada en valor y más seguridad en nuestras predicciones. Hemos aprendido mucho, personalmente jamás estuve expuesta a tanto aprendizaje y 2022 será un año de retos. Los retos aceleran el aprendizaje y en este año deberemos trasladar lo aprendido a planes sólidos de ejecución en beneficio de los pacientes, a quienes nos debemos.

EF: ¿Podrías elaborar sobre el rol de 3M en salud, durante la pandemia y específicamente en México?

AM: Desde 3M nos hemos integrado a la cadena de valor en lo que refiere a salud, empezando por conocer la demanda real de la primera línea de salud: el paciente, el médico, la enfermera y el laboratorio. Conversamos con ellos para conocer sus necesidades reales. Conociendo la demanda real podemos brindar un compromiso de entrega. Construimos y priorizamos relaciones con las entidades más preparadas para el abordaje de una enfermedad o condición crítica de salud. La prioridad debe estar alineada y coordinada con la estrategia y la política de salud del país. En el proceso aprendimos que juntos somos un equipo, todos estamos en igualdad de condiciones en responder a la necesidad de un hospital nivel 1 o nivel 4, de un hospital privado o público, de una enfermera de cuidados intensivos o un médico intensivista sin importar la función, antigüedad o títulos. Cada persona tiene que estar comprometida a brindar una solución a una necesidad. Nuestro éxito reside en que durante la etapa crítica nos basamos en nuestros códigos éticos: ser honesto, transparente, leal y actuar en todos los compromisos adquiridos. Con la información adecuada prometimos dar respuesta basada en la necesidad del cliente. Construimos competencias internas, mejoramos capacidades e innovamos, pero lo más complejo fue engranar la relación proveedor-cliente.



Hoy nos sentimos seguros de lo aprendido, vendrán nuevos retos que también abordaremos seguramente con éxito debido a la capacidad inventiva que hemos desarrollado después de unos años muy complicados. El compromiso de la gente, su capacidad inventiva, trabajo en equipo y la motivación derribaron barreras, logrando resultados en beneficio del paciente.

EF: ¿Cuándo mires atrás a este periodo de su carrera profesional, como quisieras ser recordada?

AM: Me gustaría ser recordada como una líder que se adaptó al cambio, que permitió que su organización se expresara de forma honesta y transparente para que su adaptación al cambio sea eficiente, eficaz, y rápida. Que mis clientes me recuerden por haber sido honesta desde el primer momento. Honestidad es la palabra crítica, a los números se los llevará el tiempo pero los principios y la honestidad siempre serán parte de mi vida y es un motivo por el cual ser recordada. Mi mensaje a mi equipo es que sean ellos mismos, transparentes y honestos, sobre esa base viene el éxito. El éxito puede ser medido de muchas formas, pero en mi opinión es la mejor base para el éxito. Saber que hice lo mejor que pude me permite dormir tranquila.



David López

Country Managing Director
BioMarin Pharmaceuticals México

EF: Could you elaborate on Biotech role in Mexico over the last two years?

DL: As a biotech company, we faced many challenges during the pandemic. We focus on face-to-face relationships with our customers -the patient is the central part of our formula- and without that possibility, we were challenged. Due to the volumes managed in the rare disease market, most of our customers are from the public market. We could not see patients or stakeholders, legislators, key decision-makers, administrators, key opinion leaders, physicians, health professionals, or other people of the health ecosystem. It was a challenge to approach our stakeholders, especially those working in the government. With the focus on Covid and the country in lockdown, it was hard to interview doctors and get the patients diagnosed; it was difficult to develop tools to reach and find patients. We worked on creating links and engagement by sending protective material to the doctors, which were very well received. We assisted patients in getting to their therapies, working with NGOs bringing patients in every week using private transportation. We developed alliances with private companies, hiring private nurses and private infusion centers.



EF: There has been a massive emphasis on communicable diseases these last two years, but how can the importance of rare diseases be restored?

DL: We are living in transformational times; the topic of the rare disease, in general, has been growing every year with more people getting engaged. I have worked for 15 years in rare diseases, and I have seen many changes and developments and growing awareness. We are at the point where it is rare for people to have never heard of rare diseases. The real challenge lies in the next step: move forward with the legislative changes; each country has local laws regarding rare disease care, and legislation is the place to impact the care of the patients. We are converting ideas into actions: more access, more approved therapies, more sites to provide treatments, and more budgets to care for the patients. Health currently is very much on the public agenda; post-Covid, we have an excellent opportunity to leverage the health momentum. The earlier we can diagnose the patient, the better the outcome -a timely diagnosis makes all the difference. It is a good moment for this transformation.

EF: You mentioned it was a good moment for health; how can we keep this momentum moving forward?

DL: The key to keeping the health momentum going forward and on the public agenda is to work together as a community, establish public-private alliances, talk with key decision-makers, and offer new schemes. We have been working with the government for some time to provide tools to facilitate home care treatments, creating different alliances to achieve this. We work on awareness campaigns and meet with legislators to maintain interest high on chronic and rare diseases. First contact doctors must have the tools to diagnose patients. It is the right moment to stimulate diagnosis through medical education because medical education is the basis of everything. Globally, doctors don't receive much information on rare diseases during their education. They know all about diabetes or hypertension, or other massive disorders, but this is not the case with rare diseases. It is a good moment to stimulate programs that add some rare disease content to the academic curricula of the universities.





Hector Orellana

**VP North Latam
MEDTRONIC**



EF: What was Medtronic's role during the Pandemic and over this last year?

HO: Latam has two clearly differentiated healthcare systems: the public and the private sector. *It has been exciting to see the joint effort the sectors have made to face Covid in each country of the region. Early in the pandemic, efforts focused on diagnosis and prevention, at the moment, the focus is on vaccination, but we will very soon be tackling the bubble of unattended surgeries and delayed treatments. The only way new solutions find their way to patients is to partner with either (or both) healthcare systems. Medtronic has been a relevant enabler of technology and access and has learnt to be flexible and adapt to the new environment. We can provide adequate treatment to patients as allies of both systems.*

EF: Did you have to introduce any new KPIs to manage operations this past year?

HO: *We worked on understanding and integrating all the external Covid indicators, including vaccination rates -differentiated by country- to make local and day-to-day decisions. Even for traditional business decisions or people-based decisions, we incorporated external environment indicators to help our decision-making. Our new company CEO has generated a transformation across the organization over the last eighteen months. With Covid and the present volatile situation, the management style has undergone a massive change.*

EF: What will be the skill-set required for the future employee, for surgeons and physicians, considering the technologies being developed and becoming available?

HO: *Our team has learnt how to manage uncertainty, to move quickly and decisively taking advantage of the opportunities, acting boldly and competitively in the market, all of which will provide better access to patients. As far as our doctors are concerned, we have to deploy resources to get better solutions for each patient and access more patients in general. Digitalization has to happen; the systems will learn to (re)deploy the limited resources in the best way possible because we need to be wiser with our resources. The possibilities technology offers today are incredible; it allows us to receive information and provide virtual training. The different generations of physicians must*



be prepared to adapt and learn to be comfortable with the new tools we offer because the adoption of technology can vary so much. The relevance and responsibility of training surgeons is a crucial element to our success in the adoption of technology.

EF: When you look back on this period in your professional career, what would you like your tenure to be remembered for?

HO: *Today, I am better prepared than twelve or eighteen months ago. When I look back at decisions we made four or six months ago, I now feel much better informed and prepared, as the constantly changing environment is an impressive teacher. Looking back, I will be satisfied with what we did because I am confident that all our teams never stopped working for the patients. We have changed, the leadership has changed and developed, human resources decisions have changed, and this experience will set the way we work in the coming years because I don't see us going back to how we worked pre-Covid.*



Alejandro Paolini

Managing Director

Siemens Healthineers - Mexico, Central America & the Caribbean

EF: What do you think 2022 will be the year of?

AP: *It will be the year of bringing patients back to healthcare. Many patients stayed away from hospitals and care centres during the pandemic because of the risk of getting infected and hospitals' limited capacity. The pandemic delayed the diagnosis of other health conditions, which put many patients' health at risk.*

In 2021 there was a 50% drop in clinical consultations for non-covid related illnesses. Non-communicable conditions like diabetes and cardiovascular diseases suffered severe losses. For some diseases, the casualty rate went up by 40%. *The later a disease is diagnosed, the higher the risk is for getting severe complications. That is why it is essential for health to be a personal responsibility for everyone. We must get the focus back to the non-communicable conditions as they are an ongoing battle on their own.*

It is paramount to educate the patient about health and personal care this year. As a sector, we should plan the infrastructure ahead of time and increase preventative measures for patients. To remain sustainable as an industry, we must learn to prepare for the future and invest in our health. As individuals, we must engage, learn, and



take preventative measures.

EF: What are the trends in personal healthcare, and how can health awareness be increased in Mexico?

AP: *There is a positive mindset trend on healthcare and prevention after covid-19. People are slowly going back to healthcare and getting their checkups. People are no longer afraid, and hospitals have better capacity. There should be more collaboration between the public and private sectors to expand the healthcare infrastructure. Prevention is a joint effort and responsibility for the government, healthcare sector, and individuals. Therefore, people need to be taught and shown the benefits of preventing illnesses.*

EF: What do you think is the role of physicians within diagnostics in the future?

AP: *Physicians are the backbone of healthcare and diagnostics. That is why they play a vital role in diagnostics. The more physicians integrate their practice with digitalization, the more critical their role becomes within diagnostics.*

Technology and new models of patient care support add value to the healthcare sector. Artificial Intelligence is just a tool and guide to help physicians providing them valuable assistance and insights from the patient and allowing them to become more patient-centric by simplifying routine tasks, leaving room for their expertise to shine through. *AI helps physicians to make more informed and personalized decisions and focus on the best treatment for patients. Physicians will always be the decision-makers. The fundamental objective of using technology is to help restore humanity to patient care and reduce menial tasks.*





Enrique Giraud

General Manager

Javier Giraud

Medical Systems Manager
Fujifilm



EF: Can you elaborate on Fujifilm's portfolio development?

EG: *Our portfolio has diversified. The company's investments now go towards new technologies in healthcare. These investments have enabled us to get equipment to diagnose covid patients successfully. Pneumonia is easy to diagnose through x-ray. The treatment process can easily be seen through an x-ray as well. Fujifilm made investments in lightweight equipment that can easily be moved from one room to the next in hospitals. Many public hospitals in Mexico do not have the right tools to move heavy equipment, so lightweight equipment is advantageous. We worked with bronchoscopes, especially at the pandemic's beginning, as they were in high demand. Ultrasounds replaced x-rays for patients that had covid and pneumonia during the pandemic as it is the safer option. Fujifilm acquired SonoSite, a piece of handheld ultrasound equipment through an acquisition. This equipment was critical for the diagnostics of acute covid patients.*

Most of our product lines contribute to the healthcare industry. We try to keep good sourcing of the products. We were fortunate to have high-level stocks that we used to supply to new medical facilities specializing in treating covid patients. We are very proud that we could help the healthcare system by providing the equipment for diagnostics and treatment during the pandemic.

J: *Japan has been moving from hospitals to home care, which helped our company innovate and create some of our current equipment. This equipment was available before the pandemic but became critically needed during the pandemic. We supported many of our partners with this equipment and stocked it in some hospitals. Part of our arrangement was to have the right technology during the pandemic. Most mobile devices are made with an inbuilt covid detector, which is possible because of AI (Artificial Intelligence). The AI system supports doctors and other technicians to identify if there is anything wrong. Sometimes we provide more equipment to our regular clients to help more patients.*

EF: What advice would you give on developing existing partnerships and ensuring the security of supply?

EG: *Knowing your partners is very crucial. Not all the products we are developing will cater to everyone. We need to have local knowledge to understand the Mexican market and make it more efficient. Salud Digna was a key client in AI. They were one of the first customers for Fujifilm, with one of the largest databases. AI technology has helped them make more precise and quicker diagnoses. We have worked with other companies on equipment like x-ray machines. Many of the equipment is tested and developed in Mexico, considering the Mexican infrastructure. It is crucial to have these advancements in healthcare that are a more personalized and more tailored treatment for the patient because they will produce better diagnostic results.*

New lightweight and flexible equipment are very advantageous and easily adaptable. Some of our consoles for imaging technologies have been developed in Mexico. We run many of these tests in Mexico because we know our customers and what we want and need, and we can provide feedback to the developers.



Fabiola Trigueros

CEO and President
Smart Scale

EF: What is the secret to raising awareness of the services offered in Mexico as high-quality services?

FT: *Being dynamic is the most important thing. Customers reducing their sales force was a challenge for us because there were no reps on the ground. Most of our customers continued paying for the representatives, and some even increased services with us. The focus was the clients' needs and understanding how digitalization would help improve our services. Because we are like a boutique company, offering ad hoc the quality must be the best. We learned from internationally proclaimed companies, improved the service design, and do service better.*

Taking care of the team is just as important as taking care of the client in our company. We look at what the client needs to improve our quality and delivery. We aim to satisfy all our clients and keep improving beyond their expectations. When covid-19 came, we let all our employees stay on even though there was no certainty about the future. We even got hires to clean the data, which helped us stay prepared and improve the quality of our services. In my experience when an employee is appreciated and treated well become more productive by the company.

“Taking care of the team is just as important as taking care of the client in our company. We look at what the client needs to improve our quality and delivery.”

EF: Can you elaborate on some of your recent key developments?

FT: *Recently, we launched a pilot program on Harmony CRM that will have 1000 users by April of this year. Our main product is the Harmony CRM, but we also have database services, email marketing, direct marketing, and virtual rep services. It is a beautiful company that is creating value in the sector. We believe that focusing on quality over quantity is important to drive growth.*

EF: What is your advice for the young women and girls in Mexico who dream of being entrepreneurs and aspire to start their careers?

FT: *With the right partnerships and people, anyone can succeed in anything they set their mind to. The best advice I can give to young women is not to get loans from banks. People must have determination to stand, which will make them grow. When you are aligned with the right people, who believe in you and your dreams, you will go places—having the right people around you with the knowledge and capabilities that you don't will help you build your business. By learning and staying alert, with be innovative, never lose focus with responsibility and constancy in your business.*



Mauricio Guizar M.

General Manager Mexico
Biogen

EF: What was the mission you initially set for yourself on appointment?

MG: Several ones. Biogen was established globally in 1978 however, in Mexico, it was established 3 years ago. *The mission I set for myself was to help our company have a better presence in the country and to play its role in the present journey, from accelerating diagnostics, to bringing awareness of complex diseases, and to also bring education about our different treatment options.* We did have a portfolio that was commercialized through third parties, now we're doing the entire job ourselves and we now have a portfolio with different treatment lines, for different populations with multiple sclerosis.

Biogen is also the pioneer of spinal muscular atrophy treatment in the world and has around 2,000 patients in 50 countries; and we want to maintain that greatness and bring easy diagnosis options and benefits to the Mexican population especially to older patients who have the biggest challenge of accessing treatment.

EF: What attracted you to join Biogen?

MG: *The pipeline and the values. Biogen is specialized in neurological diseases, and has a portfolio with Biosimilars It also has an immunology portfolio in the future and a digital portfolio as well. Not a lot of companies are focused or specialized business units focused on the digital side. The values of the company really describe the people, and it's a pioneer on multiple sclerosis, spinal muscular atrophy, and now Alzheimer.*

EF: How do you determine your partnerships in Biogen?

MG: *Our global mission is to see all patients access treatment. As such, we have to create partnerships in a way that support this vision. Biogen then creates alliances with the government to develop educational programs for physicians in different levels of attention, certified and verified by different institutions. Our vision also includes creating an environment in which product supply is always available and having evidence in hand so that physicians can make treatment decisions based on clinical need.* The payers have to create different proposals and understand the value products that have different models of acquisition so more patients can benefit from treatments.



It's an easy and flexible way of looking for partners and as COVID has shown, environments are ever changing so we have to adapt.

EF: How would you like to be remembered as a leader?

MG: *I want to be remembered for bringing change in the health sector and for supporting more patients to have different treatment options.*

I want to be remembered by my people as being someone who advocated for their development and for helping them be best version of themselves by supporting and coaching them.



Luis Verduzco Koloffon

Director
GELPHARMA, México

EF: ¿Cuál es su consejo para que las personas regresen a sus controles y se enfoquen en su salud?

LVK: Covid concientizó a la gente sobre la importancia de la salud y llevar una vida más balanceada -más ejercicio y mejor dieta- en consumir vitamínicos y a la prevención. Se puede aprovechar esta nueva conciencia para invitar a la población a conocer e involucrarse con su propia salud y vivir más saludablemente. A su vez, las empresas amplían sus portafolios para padecimientos desarrollados y los que puedan evitar complicaciones crónicas a largo plazo. *Con la nueva conciencia de cuidado de la propia salud, la industria tiene la oportunidad de crear un vínculo con el consumidor. El gobierno, los líderes de opinión, la comunidad médica e incluso las escuelas hoy toman relevancia; las consultas reactivadas, y la interacción directa juegan un papel importante para la prevención en todos los sentidos.* Los gobiernos pueden aplicar los mismos recursos utilizados en campañas de distanciamiento social, a estrategias de prevención, salud, alimentación y promoción del deporte, para recordar a la población, la importancia de llevar una vida sana.

EF: ¿Cómo ve el rol de la industria de la salud en el desarrollo de la economía?

LVK: De forma directa a través de impacto de generación de empleos de calidad, de empleos profesionistas y de gente joven. Es una industria joven que constantemente atrae químicos, farmacólogos, ingenieros eléctricos y mecánicos. *La tecnología está muy integrada a nuestros procesos de manufactura creando una cadena de valor adicional. Las empresas que surten a la industria farmacéutica deben pasar por procesos muy rigurosos de calidad y certificación y permite que esas empresas puedan sumar valor a sus productos, empleados y empresas. Lo mismo pasa en logística, en forma indirecta, no es lo mismo transportar otros materiales a transportar insumos médicos.*

EF: ¿Cuáles considera las capacidades del personal necesarias para un mejor desarrollo de talento?

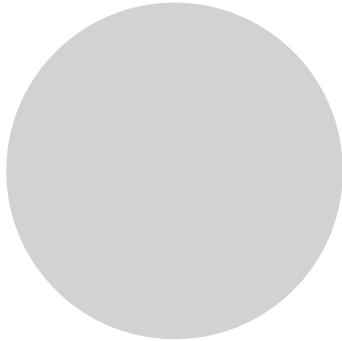
LVK: *Hoy es necesario tener un perfil completo, conocimientos para interactuar con distintos tipos de tecnología, análisis, información y estadística. La industria farmacéutica es muy amplia, incluye logística, analítica, médica, fisicoquímica, y un acercamiento a universidades y centros académicos.* Las grandes industrias trabajan con la academia y nuestra gente debe poder interactuar con ellos para tener funcionalidad de equipo. Con la reactivación de la economía también se activa la búsqueda del talento, un recurso muypreciado. En un mundo



globalizado el inglés es una habilidad necesaria, y la tecnología nos obliga invariablemente a tener cierto nivel técnico y capacidades básicas. Hay mucha estadística en farma, y en lo mecánica estamos, cada vez más, enfocados a la robótica y es importante contar con conocimientos tecnológicos.

EF: ¿Cuándo mire hacia atrás a tu trayectoria profesional, como quisiera ser recordado?

LVK: *Queremos posicionarnos como líderes dentro la industria nacional, ampliar nuestro portafolio de productos y alcance dentro de la población y diferenciarnos en innovación a través de nuestros productos, y terapias innovadoras. Colaborar a una industria nacional más sólida con regiones fuertes y desarrolladas como Jalisco.* Mayor exportación de medicamentos será un indicador que la industria de México ha madurado correctamente. COFEPRIS es una agencia muy reconocida globalmente por su exigencia, en México estamos acostumbrados a los niveles regulatorios más altos. La prioridad es, por supuesto, suministrar México, y la exportación significa que la industria es capaz de suministrar el país y a otras regiones del mundo. Nuestra población local siempre será la prioridad, es nuestra razón de ser. A diferencia del sector agro, con exportaciones importantes, el sector farma en México actualmente exporta poco, y ambos sectores tienen el mismo potencial. Me daría mucho orgullo saber que en cinco años estaremos participando de las exportaciones mexicanas.



Luisa Suarez

CEO
Vitalmex



EF: 2020 fue un año dedicado a diagnósticos y prevención, 2021 a las vacunas, que cree nos traerá 2022?

LS: Últimamente nos hemos enfocado a superar el Covid, pero la salud es mucho más que un tema epidemiológico. Mantener una población sana, tanto física como emocional y mentalmente requiere de muchos esfuerzos. En Vitalmex no estamos en farma ni en la atención de pacientes Covid, *nos ocupamos de procedimientos emergentes que representan mantener la vida de pacientes, nos esforzamos para que nuestros colaboradores estén siempre en el campo y listos para atender las necesidades que surjan.* Muchas cirugías, sobre todo las electivas, han sido postergadas o diferidas, incluso también algunas críticas. Vemos cómo recuperar esos rezagos para que la gente pueda atender ciertos puntos importantes de su salud –que hoy ya pueden hacer. La situación de guerra en Ucrania nos afecta indirectamente; el conflicto ocurre lejos de México, pero junto con el rezago existente en la proveeduría de insumos, hay un impacto y estamos afectados. *No obstante las circunstancias, hoy les aseguramos a la gente que los equipos, tecnología, instrumental quirúrgico e insumos de diversas marcas van a estar para cuando los pacientes lo necesiten. Creo que todos debemos de sumar esfuerzos y asegurar los procesos sean perfectos, sobre todo la logística, y aseguramos que los pacientes que tienen temas críticos de salud hoy los puedan atender.*

EF: ¿Podría compartir como han logrado incrementar la productividad y calidad en sus procesos y entregables (productos y servicios), a pesar de la pandemia?

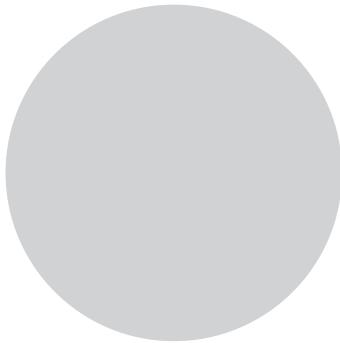
LS: *La respuesta está en el liderazgo. Somos seres humanos y necesitamos guía, inspiración y motivación para enfrentar las situaciones de crisis, sintiéndonos igual de comprometidos con el sector. Nosotros estábamos preparados porque teníamos la base de un programa de liderazgo humano que desarrollamos años antes.* Todos en la parte administrativa tuvieron las herramientas para cuidar a aquellos en el campo, y no perder la empatía que teníamos muchos colaboradores. La mayor parte de nuestro personal estaba en campo y el administrativo también experimentaba situaciones muy particulares por la cuarentena. Gestionamos el trabajo remoto que ya habíamos instaurado pero no probado en un esquema remoto. *Todos nuestros líderes tuvieron mucho acompañamiento con base en esa formación*



de liderazgo, para poder estar muy pendiente de la gente, que sepan exactamente qué tenían que hacer, desde cómo debían de pedirles prender la Cámara o iniciar reuniones virtuales. Se enfocaban en el manejo de la interacción virtual, tratando de no perder el contacto humano, la espontaneidad del contacto presencial (pláticas del clima, alguien llega tarde, algunas bromas).

EF: ¿Hay algún mensaje que quiera agregar, que no hemos tocado?

LS: *La capacidad de nuestra de empresa de ser flexible y entender bien el mercado en el que estamos y sus necesidades. Vitalmex es un importante integrador en México, y trabajamos en ser un mejor participante del sector. Si todas las empresas lo hacemos, creo que vamos a lograr contribuir a los sistemas de salud de México y el mundo. No quedarnos en el Estatus Quo, que no es bueno para nadie, ni para los humanos ni para las empresas.*



Dora Cano

General Manager
Bayer SA

EF: In 2020, the focus was on diagnostics; in 2021, the focus shifted towards vaccines; what do you think 2022 will be the year of?

DC: The pandemic shook us and changed the way we approach health. Several patients lost the opportunity to get their check-ups, diagnosis, and treatments in time. 2020 was the year of diagnosis for covid, not for other diseases.

The positive side of the pandemic was how it helped to highlight the importance of health in our lives and the importance of preparedness and prevention. Many businesses and people learned to invest in innovation. The way many companies were prepared and willing to invest in covid heavily accelerated the development of vaccines.

2022 will be the year of stabilizing the system and restoring stability in our day-to-day living. *It is also the year of curiosity. We need curiosity to assess what is going to stay and what is not going to last.* What we learned in the past two years will enhance the future of health. We will be going back to the future of health.

EF: What do you think Mexico needs to embrace gene therapy and innovation?

DC: *A cooperative environment where companies, institutions, and authorities work together shapes the market environment for new treatments and solutions. We support collaborative solutions that enable innovation to shine through.* At Bayer, we want the health authorities to support the model needed for innovative gene therapy.

EF: As one of the top employers in Mexico, what initiatives is Bayer taking to ensure you stay as a top employer?

DC: *To remain relevant organizational culture should evolve and be enriched by its immediate environment and the evolution of society.*

At Bayer, we reflect the society in terms of diversity and drivers of motivation because we are part of society. For new talents, their drivers of motivation may be a good salary, the company's flexibility, engagement with our purpose, or the possibility to make an impact with their ideas. *Which other company can highlight how they are tackling two of the biggest challenges today, health and food? We work to have health for all and hunger for none. These are all tangibles.*

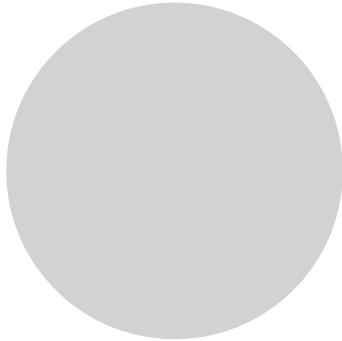
When hiring, we want to know the candidate's purpose and what makes them happy. *The basic motivator is understanding what makes people happy and fulfilled. When people are happy, they are highly productive.*

EF: What is the difference in access to innovation between Brazil and Mexico, and how would you differentiate the meaning of access in each market?

DC: I have had the privilege to work in six different countries in my career. This experience has broadened my perspective. In my previous position, I was in charge of Brazil's access and commercial work. Bayer is working with other companies in the traders' association to make access possible. *It is essential to sit and work with all the stakeholders, the medical community, and other players that can intervene to show that innovation does not come with an extra cost.*

Usually, innovation saves and makes people's lives better. *We must be flexible enough to adjust our value proposition to avail access to all patients.* In Latin America, especially in Brazil and Mexico, many people depend on the public system to gain access. *We must be innovative and creative enough to bring solutions that aid healthcare sustainability.* The sustainability of healthcare is a lesson that healthcare systems worldwide learned from covid. Now we understand the impact that healthcare has on the economy.





Morgan Guerra

Founder & Medical Director
PreVita

EF: What was the role of PreVita during the pandemic?

MG: *PreVita was a good ally to both the private and public health-care sectors. A new branch was formed that provides technological services. Salud Digna was looking for a company that offers new technology and telemedicine, and we showed up. We specialize in telemedicine and project that telemedicine will become more mainstream by 2029. However, the pandemic changed this projection. People adapted to telemedicine overnight, and telemedicine is fast becoming mainstream medicine.*

For providing great solutions during the pandemic, PreVita became the largest virtual hospital in Mexico, with more than 8,000 patients. At some point, we had to serve 800 patients simultaneously. That meant we had to install 800 oxygen concentrators in 800 homes simultaneously. In January last year, we had to install 30 to 50 new patients per day. There were high volumes of patients who needed care, to the point of hospitals exceeding capacity.

EF: What is the role of healthcare in developing the economy and society in Mexico from your perspective?

MG: *If you do not have health, you have nothing. If the population is not healthy, the economy will not work. During the pandemic, Medtronic contracted our telemedicine services for their employees because they had to keep producing and servicing respiratory devices throughout the pandemic. They managed to keep their factories and offices running with 13,000 employees by using telemedicine services. The benefits were for the employees and their family members.*

Many companies are beginning to shift their focus toward the health of their employees. The IMSS is collaborating with other telemedicine service providers and us to be able to look after the health of their employees. Keeping employees healthy will be the key factor in starting up the economy.

EF: How do you see PreVita evolving in the future?

MG: *The pandemic was a turning point for everyone. Informatics and communication technology companies like Google and Microsoft are tapping into healthcare. There are different laws for different countries, so investors have to know how to navigate the health*



system of each government. There are huge public finance systems and providers in Mexico, but many private infrastructures must abide by the land law. Peru and Columbia have a mixed public finance system and private providers.

People think they can provide a good solution for every community; to do so, they need to adapt to the reality of that community. PreVita can help global enterprises deploy into Mexico easily. We can become a great partner for the global enterprises that want to go into Mexico.

EF: Would you like to share a final message?

MG: *The adaption of new technology has been a breakthrough through the pandemic. The pandemic showed us that we did not know how to handle it. Globally we thought pandemics were things of the past. We need to learn to manage crises in the long term. We must learn to be prepared by trusting science and technology and working together. The world needs to strap away politics and other issues that stop us from collaborating to help us prepare for future crises.*



Cris Thompson

XXX
AMIIF

EF: What advice would you give to paying attention to non-communicable diseases?

CT: During the pandemic, the main focus was on covid, which led to an increase in non-communicable diseases. We are beginning to learn the secondary impact of the pandemic. Each country will now have to go back to the main causes of mortality conditions and start fighting once again. *Governments will have to start thinking and planning how to avoid other pandemics.*

Globally, we have to start thinking differently about logistics and management systems. Most people are now settling back to normal. The G7 and G20 reports are on future pandemic preparedness. *We need to have critical thinkers that will help improve each country's plans to become better prepared for the future. We have to bring together technology solution companies and health, not just medicine.*

Private sectors have to start thinking about how they can help their governments with more efficient ways of taking care of health. We have to think about innovations that improve the country and how to get funding to sustain those innovative solutions.

We are in the last third of our presidential administration, so we will have new candidates running for the presidency soon. Governments and administrative offices should start thinking long-term. The private sector has to develop innovative proposals that add value to the government. There are a lot of pieces to the puzzle that need to be put in place. At this time, we should be at the drawing board,

coming up with solutions for sustainability. We have plans that go on until 2024. *We need input from AMIIF, device, and telemedicine companies to devise the best strategy.*

Eighteen million people live in small communities, which is 15% of the population. We can reach these small communities through telemedicine. *We need to understand the country's reality to develop an innovative and sustainable health plan. A plan that does not depict the truth and solve problems is not chosen, and a plan not chosen is a plan not implanted.*

EF: Can you elaborate on what ought to be the key highlights for healthcare?

CT: NCDs need to be highlighted. NCDs keep increasing, which is a major financial challenge for the market. *There has to be early diagnosis for earlier pharma innovation and intervention.* Here in Mexico, we have to improve our pharma innovation time. There is a need for precision medicine.

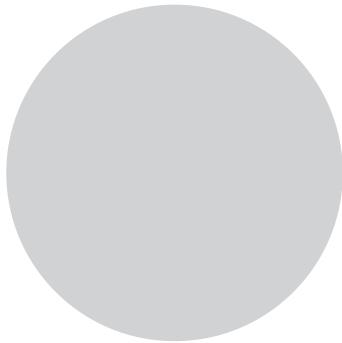
We need to talk about the patient's needs, accurate and early diagnosis, precision medicine, and the right treatment. The government usually buys generic drugs for everybody, which does not work. *The government needs to be educated to gain the right precision mindset.*

The ideal model is a success model. A success model encompasses pharma companies sharing their successful trial studies, treatments, and medicine. After the treatment has been administered, the outcome has to be monitored and the details recorded. *A fully integrated clinical trial solution leads to a successful trial.*

Companies have to follow up with their trial patients and see if they take their medicines often enough, if they get regular checkups, and if they need digital solutions to maintain their treatment plan. *The follow-up is important, and so is the patient's confidentiality.* The follow-up is crucial because it shows the treatment's results and effects. It also saves companies from continuously financing an unsuccessful clinical trial. Trial efficiency is the most important. There is an upcoming forum that will be based on fund efficiency.

Mental health is at the top of the agenda. It is going to be the next pandemic and has already started happening. We need to figure out how to intervene and eliminate the stigma of mental conditions. It is something that should always be at the top of the agenda.





Horacio Garza Ghio

XXX
Christus Muguerza Mexico

EF: There has been a massive emphasis on communicable diseases these last two years; how can the importance of chronic diseases be restored and bring patients back to care and regular checks?

HG: The use of technology has been a cornerstone in getting the patients back to care. We organized webinars and educational programs for the community during the pandemic to help them feel safe about going to the hospital when essential. Through technology, we provided digital platforms to our customers -employers, insurance companies, and the community. We convey educational tips and provide tools for patients to schedule consultations virtually, so they only come to the hospital for a specific consultation. We will continue to drive all digital initiatives. We are launching a telemedicine platform which has been a slower process because the culture in Mexico prefers face-to-face communication with the physician. We advance step by step, and we are slowly but surely making progress in telemedicine and electronic medical records. This system will be remarkable, particularly for high-risk patients with hypertension or diabetes, as they can avoid going to the hospitals. Telemedicine will be the solution not to expose high-risk patients. Ninety percent of our doctors are private practitioners, so they also needed the tools to connect with patients, and during the pandemic, we gave all these platforms and tools for free. We are now including the platforms in our portfolio to provide a more integrated continuum of care.

EF: What is the importance of the role of healthcare in the Mexican health economy?

HG: In most countries, at least three central issues must be addressed and solved: Health, Education, and Safety. Healthcare comes first because we can't achieve the other two without health. Health

management in a country is crucial; in Mexico, 16% of the total population is diabetic, which means about 24 million people have diabetes. We must seriously address society's healthcare first; if we don't focus on healthcare, it will be impossible to allocate the right resources to safety, education, infrastructure, or anything else. As a country, we need to work vehemently on building healthier communities and healthier people.

EF: When hiring talent, what are the new skill sets to look for in employees?

HG: The skillsets have changed, and we have added new skills when hiring:

Digital mindset: involves more than having digital skills; it is a new way of thinking. It is about studying healthcare issues and searching for the right digital solution for the problems while avoiding high costs. The correct digital tools should be carefully designed and implemented to achieve the right benefits and profits, and we need people who care about what they are doing.

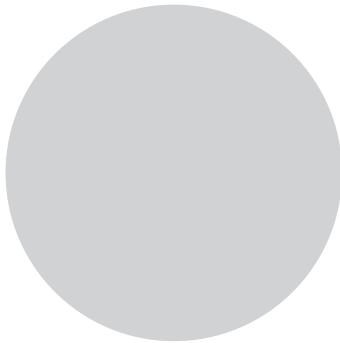
Understand and master change management: this is a relatively new discipline in management. Changes do not happen by themselves, and leaders need to manage change. In an environment that changes very quickly, we need leaders that understand and are proficient in change management.

Deliver an exceptional experience to the patient: it is not only about quality management but also about providing excellent service. We design our websites for those who use them to have a wonderful experience; the environment around our services must provide an unforgettable experience. Leaders must always participate in designing an exceptional experience for their customers and patients.

EF: How do you balance having doctors from different generations in matters of digital progress?

HG: By putting common objectives in the center. We do not talk about generation differences but focus on common ground: our mission, the patients, and we always help those in need in the use of digital -help them get the right training- although we encourage people to educate themselves. A 65-year-old person that reports directly to me is going back to university to get another degree. I am always interested in new skills, not just classic cost management, revenue, or inventory; we need to go to the next level.





Ricardo Martinez

Director and Co-Founder
Kabla Mexico

Chemiluminescence is one of the launchings we're excited for this 2022, We're also strengthen our participation in Chemical Chemistry, hematology and Acute care (Gases and Electrolytes) solutions. trying to pursue more accurate electrolytes, And in the future we need to go after big markets, such as hemodialysis.

EF: Looking back at the past three years, 2020 being the year of diagnostics, 2021 the year of vaccines, what do you think 2022 will be the year of?

RM: 2022 is going to be the year of treatments release by pharmaceutical companies and FDA, Regulatory agencies around the world (Instead of FDA) and also the year of reactivation of processes and health activities outside the COVID. Noting that the pandemic is still present, we're trying to promote and push our product catalog made by more than 40 different suppliers from 25 different countries. We must move on from the pandemic.

EF: what role did Kabla have during the pandemic?

RM: Kabla was the first company to get an approved antigen solution also the top 3 in molecular tests. It has seven different products for the detection of COVID, four different rapid tests, two for antibodies, and two antigen tests. We represent a couple of large American companies,

as well as Certest, a Spanish company that is a global leader in COVID.

EF: From a diagnostics perspective, how do you define access in relation to what we've been talking about?

RM: The aftermath of the pandemic now has physicians in possession of faster and more accurate diagnosis methods and likewise for patients. Kabla has a big catalogue for different diseases and has different solutions such as rapid tests and point of care equipment's which are portable devices that help with diagnose samples to get quantitative results. We're also investing in chemiluminescence, which is a more sensitive methodology, more accurate and not necessarily more expensive.

EF: Is there anything that's upcoming or anything that's just being released that you're excited or looking forward to?

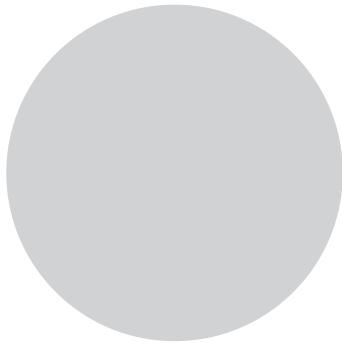
RM: Chemiluminescence is one of the launchings we're excited for this 2022, We're also strengthen our participation in Chemical Chemistry, hematology and Acute care (Gases and Electrolytes) solutions. trying to pursue more accurate electrolytes, And in the future we need to go after big markets, such as hemodialysis. We know that we can do great because we are an independent company that can undergo a faster decision-making process.

EF: Are you looking for partnerships with suppliers in Kabla outside of Mexico?

RM: Every November we go to MEDICA to present the company. We have lots of suppliers and sometimes we do have surprises with new developments, from new companies. We're also investing in new technology, we have representation exclusivity from a Finnish company that developed the first CE validated breathalyzer for COVID. With this same device in the future, they are pursuing to detect certain cancers.

EF: Can you elaborate more on your projects working on cancer or other non-communicable diseases?

RM: We have solutions for HPV in PCR and represent a company that has a patent on how they detect HPV in urine. We are trying to introduce this product in Mexico and at the same time education the communities regarding the benefits and advantages in the product. For diabetes we have 4 different meters, we have a rapid test for Hb1C, PSA, FOB also a point of care solution for Hb1C, Cholesterol, Triglycerides among others.



Sara Montero

XXX
Lundbeck

EF: What should be the key healthcare focuses?

SM: 2022 was the year of getting patients back to care in general. *Mental health has to be prioritized more than before because of the pandemic.* Depression and anxiety increased exponentially here in Mexico. Several people have been affected by mental health issues, impacting productivity. An estimated one trillion dollars is lost every year due to a reduction in productivity caused by mental illnesses.

There is a lot of stigma around mental conditions, so we have to work together toward a better consensus about mental health. We have to work on the importance of mental health to create better mental health.

EF: What is the role of mental health in developing the economy, and do you think the awareness trends are positive in Mexico?

SM: In terms of productivity, we have lost approximately one trillion dollars in the last year alone. A study is currently taking place in the UK that demonstrates the benefits of treating people with schizophrenia from the very first episode. *Every cent invested in treatment generates five dollars back. If nations and companies take care of people with mental health, there will be less investment in the future. Therefore, the earlier a mental condition is diagnosed and treated; the less severe its impact will be in the future. It is something we have to invest in continuously.*

In Mexico this year, there has been less investment into mental health. More and more countries are investing more in mental health. Mental health awareness has increased tremendously here in Mexico. *Therefore, although investments have decreased, awareness has grown tremendously.* After the pandemic, people are now more

health-conscious, and they know the importance of mental health because many people have people around them that possibly suffer from mental illnesses.

EF: How do you see progressive mind platforms evolving in the future?

SM: There are many more people engaged in our progress mind platforms. There is also an increase in people that are seeking support. Since there is an increase in people that need help, we have to follow the guidelines and the law. We have support systems for our employees. These support systems include physicians that increase mental health awareness. We are also doing a lot of activities with some associations.

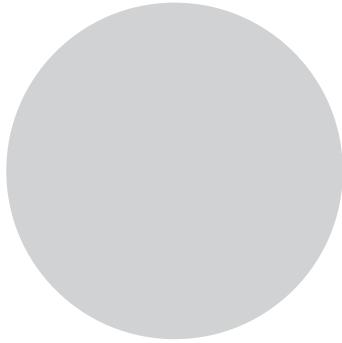
The media can be a great source of information on mental health with better knowledge and understanding. This will lead to better coverage of mental health. When journalists write about mental illness, there is stigmatization. *We have to consider how we communicate about the problems with mental health because we can subconsciously criminalize or create more stigma against mental health. Communication is key. How we communicate is important as we want to deliver the right message.*

EF: What are your expectations for Lundbeck in Mexico and the region you manage?

SM: Lundbeck's markets are in 17 countries from Mexico to Peru. Our performance has been growing year on year. *Last year alone, we grew by 9%, which is an improvement from previous years. Our growth has allowed us to help people be their best and healthier selves.* Our importance has improved the quality of life of people suffering from psychiatric and neurological disorders.

It is important to have innovative products and products that improve people's quality of life. I am proud to work in Lundbeck with its mission and people.





Alonzo Autrey

xxx
DVA Mexico

EF: Could you elaborate on how the role of DVA has evolved in the pharmaceutical industry and the new production facilities?

AA: DVA started this project on paper in 2014. We were designing the products ourselves, but were talking about manufacturing the pharmaceutical coating, which we eventually did in 2018. The focus for our company was to offer shorter time of response to the market by reducing the research and development of the products with this facility near them, and now we're really some hours away from every customer.

From that point in time to now we have focused on really trying to develop more innovative products, for example we are in the process of having a differentiated product with a patent which, from the pharmaceutical point of view, helps offer different kinds of drugs.

EF: What is the role of DVA Pharma within the DVA Mexico, and how was the portfolio evolution?

AA: Since we started the company almost 25 years ago, pharma has been our main business unit, health and nutrition. We have evolved a lot of the focus of our business development into the trend areas, but we also look to have very close contact with key manufacturers that we work with to see which trends of chronic diseases they're working on. We then translate these to our customers in Mexico to confirm what makes sense being developed in Mexico and that they can start to develop. This has been possible through consistent communication and exchange of information with customers.

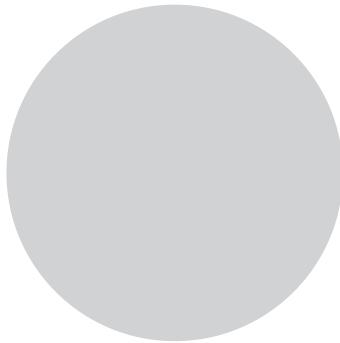
EF: Have skill sets required of employees changed?

AA: Of course. This has been the first time we've had almost five generations in the workplace, as such the needs and wants of everybody are different. The skillsets that employees need to have these days are how to make bonds and connections in/out of office. Having people working from home as a result of COVID has led to colleagues not knowing each other, and this has led many companies to having a hard time communicating their company culture to their new hires. This has emphasised companies focusing on people who can work autonomously or as part of a team. Communication skills are key.



EF: Why is it an interest for DVA to work in a developing economy such as Mexico coming from Germany?

AA: If you look at the beginning of the company, it really started more like a trading business which involved the buying and selling of products at a margin. The company was doing this for pharma on commodity products, but once we looked deeper, the future of the business was adding value and as such we chose markets that could grow and add value the most. This was in health and nutrition, which are a Latin American business, while the chemical business is now a global business. We say we are a life science company. We have agrochemicals, food ingredients for the specialties, active pharmaceutical ingredients, pharmaceutical coatings, nutraceuticals, and some other specialty chemicals focusing on personal care, household and some additional industrial applications.



Rafael Gual

XXX
CANIFARMA Mexico



EF: What are the priorities on the CANIFARMA agenda for this year?

RG: CANIFARMA represents a broad pharmaceutical industry spectrum, including medical devices and animal health. We focus on two main priorities: i) the regulatory framework, which is changing as are the people in charge, to improve the Mexican regulatory framework, and ii) work on the government's acquisition of medicines for the pharmaceutical industry and medical devices in general.

EF: What is the role of healthcare infrastructure in terms of the social impact on the Mexican economy?

RG: Healthcare is vital to all countries worldwide, and Mexico is no exception. We faced a difficult situation during the pandemic, converting some hospitals to be solely dedicated to Covid patients, which directly and negatively impacted the treatments of chronic disease patients, affecting the population in the long term. We are now recovering the hospitals for chronic disease patients and dealing with this new challenge to the healthcare system.

EF: In light of supply-chain issues and the need to restore local production, does the government understand the importance of agility and adopting measures to benefit the country's healthcare?

RG: Recently, there have been some gradual changes in the mindset and way of working on the regulatory framework. Innovation and investment must be promoted and boosted in Mexico. To capture more investments, the market should be reliable, with more development in the most critical pharma sector of Latin America, and the changes should happen not only in regulatory but across the different areas.

EF: In terms of the needs of Mexico's pharma industry, what do you think is coming next?

RG: We have to develop the pharmacochemical industry to be less dependent on the outside world, specifically and most importantly from India and China.

The role of communication has changed; our relationship with the patient has changed mainly because the sales reps have new functions and different ways of communicating with physicians.

EF: As a chemical engineer, what do you think is the formula for the future of health?

RG: Health has a vital role in all countries; the pharma industry was one of the less affected industries, mainly because health is a priority for the population. Our role is to ensure health reaches people in need of medicines. R&D is constantly challenged to produce new drugs and treatments for the newly appearing illness and variants. Our sector provided the solutions –the vaccines- during the pandemic, as is proof enough of the vital role we play in the health of humanity.

EF: What subjects do you consider vital for us to focus on in our next health feature publication?

RG: The most essential and critical field to be developed in Mexico is that of research; there is a lot of potential to carry out clinical trials, phase 2 and phase 3, but permits depend on our government's agility. The Seguro Social has approximately 70 million affiliated members - a massive field for clinical trials.