



Instituto Farmacéutico México

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# INEFAM:MEX® / INEFAM:LATAM®

INEFAM® is the biggest LATAM public sector business think tank for the following target markets:

- Pharmaceuticals.
- Medical Devices.
- Healing Material.



México & LATAM  
Pharmaceutical Public Sector  
Audit Tools.



Specialized Market Access  
Training.



Public Sector Business  
Consulting.



Unions & Industrial Associations  
Public Policies Guidance.



# INEFAM


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## About Us.

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INEFAM has established branches with presence in:

- Mexico City.
- São Paulo.



- Instituto de Investigación e Innovación Farmacéutica, A.C.
- Instituto Farmacéutico, S. de R.L. de C.V.
- Negocios de Innovación Farmacéutica, S.C.

Established: 2006



- Instituto Farmacéutico do Brasil Ltda.

Established: 2019.



## México & LATAM Pharmaceutical Public Sector Audit Tools.

- You can benefit from our 34 different public sector market audit tools to answer all your questions regarding the LATAM pharma market.
- For the specific case of México, we cover the following market groups: Drugs, Medical Devices and Healing Material.



## Specialized Market Access Training.

- Either online or inhouse, we have already developed market access training material & content.
- We can adjust the curriculae to fit your training needs.

## Public Sector Business Consulting.

- Whether you need a business guidance to help you grow your business in LATAM, or to develop your KPI's or even help you with a full business landing, we are your one stop shop.



## Unions & Industrial Associations Public Policies Guidance.

- Half a dozen industrial associations are already working with INEFAM to help them protect the strategic position of the pharma industry in the country.
- Via primary research, or just gathering real-time data, we make sure your associates are up-to-date with the opps & threats of the macro environment.



# INEFAM: For whom we do what we do?

WE PROVIDE ACTIONABLE AND USEFUL BUSINESS INSIGHTS  
TO OUR CLIENTS IN DIFFERENT COUNTRIES

**General Managers** can look for INEFAM's advise in order to obtain a very precise insight of the way your company is heading to. You can also ask INEFAM's directive personnel to become a part of your counsel or administration board.

**Business Development Managers/Directors** often worry a lot to obtain market values in the public sector in LATAM. Well, we are your one stop shop for that!

**Public Affairs.** You can ask INEFAM directive board to help you in public affairs or lobbying to protect your interests or market access initiatives.

**The Regulatory Affairs Directors** can obtain our guidance and advise on how to enter LATAM markets covering all the regulatory requirements in each country of LATAM

**BI & MKT Support.** You can use our market audit tools to provide more specific and actual data of business trends, threats and opportunities.

If you are in **Marketing**, you can obtain from us many insights and relevant data to present a more reliable and concrete marketing plan for your brand that sells to the public sector.

**Commercial Directors** can obtain from our audit tools all the knowledge you need to accomplish the 120% of your sales quota to the public sector.

**SFE.** Using our market audit tools, you can design, develop and track all the external KPI's you need in order to guarantee the full accomplishment of the business objectives.

**Industrial Unions & Associations** look for advise from INEFAM directors to help protect their associate's best interest.

**Market Access and/or Pharmacoconomy.** The health economics analysis are more powerful as long as more real data is included. INEFAM provides market values to fortify your cost benefit analysis.





(CANIFARMA Reg. No. Z7007)



## THE MEXICO PHARMACEUTICAL INSTITUTE IS THE BIGGEST CERTIFIED CONSULTANCY AND RESEARCH CENTER FOR PUBLIC SECTOR WITH STRONG ALLIANCES IN MÉXICO, BRAZIL & EUROPE.

- INEFAM® is the biggest and most renowned public institutional sector consulting firm for 7 LATAM & Brazillian markets.
- INEFAM is the biggest business intelligence on public sectors of México, Brazil, Colombia, Guatemala, Panamá, Costa Rica & República Dominicana, with over 150 million of records in the big data.
- 12 yrs in the market, founded in 2006.
- 109 pharma industry clients during 2019.
- Over 250 successful consulting projects delivered.
- Has signed contracts with over 150 pharmaceutical and distribution companies.
- INEFAM® is a certified research center for CONACyT (mexican science and technology national center).
- We are also *effective members* of the most important middle size pharma companies association in Europe, EUROPHARM SMC.
- INEFAM DO BRASIL Ltda is affiliated to SINDUSFARMA in Brazil.
- Specialized health sector data provider for CANIFARMA, AMIIF, ANAFAM, DILAMEG and AMELAF (pharma companies associations or unions).
- CANIFARMA affiliate and member of 3 different subsections.
- All of our training workshops and diploma courses are officially certified by the STyPS (mexican labor ministry).
- We are the creators of the INEFAM® National Health Access Conference.
- With over 200 alumni graduated, we are the creators of the Sales to Government and Institutional Health Access diploma course (115 hrs duration).

# INEFAM®: Which are our strenghts?

Percentage of clients that renew every year with us:

## 92.7%

INEFAM® Portfolio Market audits:

## 34

Competitor's Portfolio Market audits average:

## 3

## 60

Number of national and international publications where we've participated

Strategic intents for 2020:



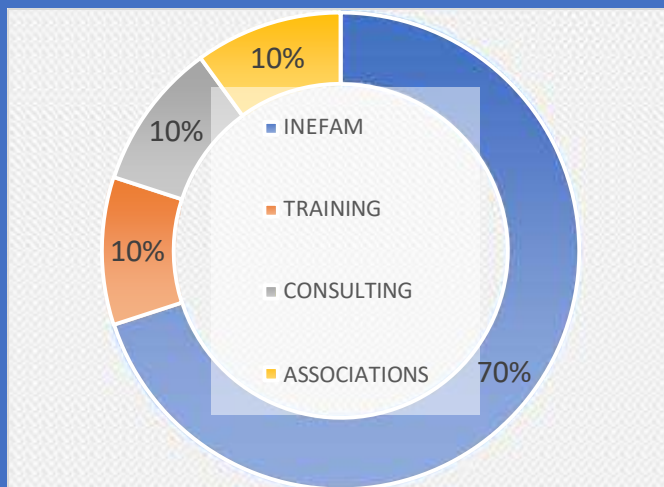
- Medical devices.
- LATAM markets.

INEFAM® is actually the only market audit provider that doesn't charge additional fees for deliverables in special formats.

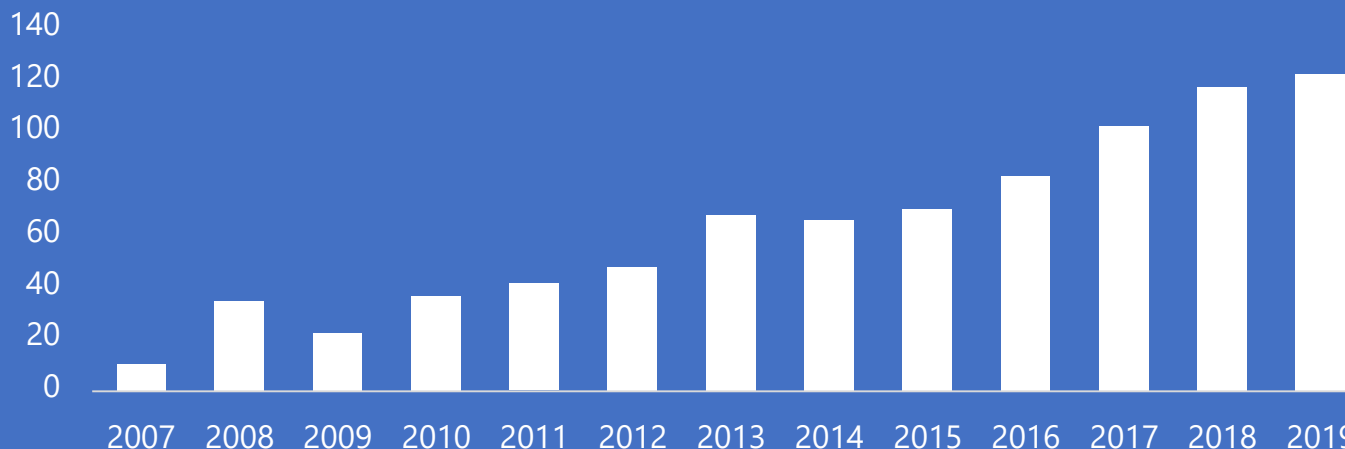
### We have the best client service team in the pharma market audits segment:

- Being an INEFAM Client Service Manager is a full career plan.
- They must have completed a full year working as an analyst for INEFAM.
- They must graduate successfully from the INEFAM® Sales to Government and Market Institutional Access diploma course.
- They must have 50% Portuguese language domain.
- Their job profile states clearly that they have to be available to attend CS requirements even on weekends & holidays.

### INEFAM:LATAM® Income distribution by business branch.



### INEFAM:LATAM® Total Number of clients per year (all businesses branches)



### How strong are our competitors?



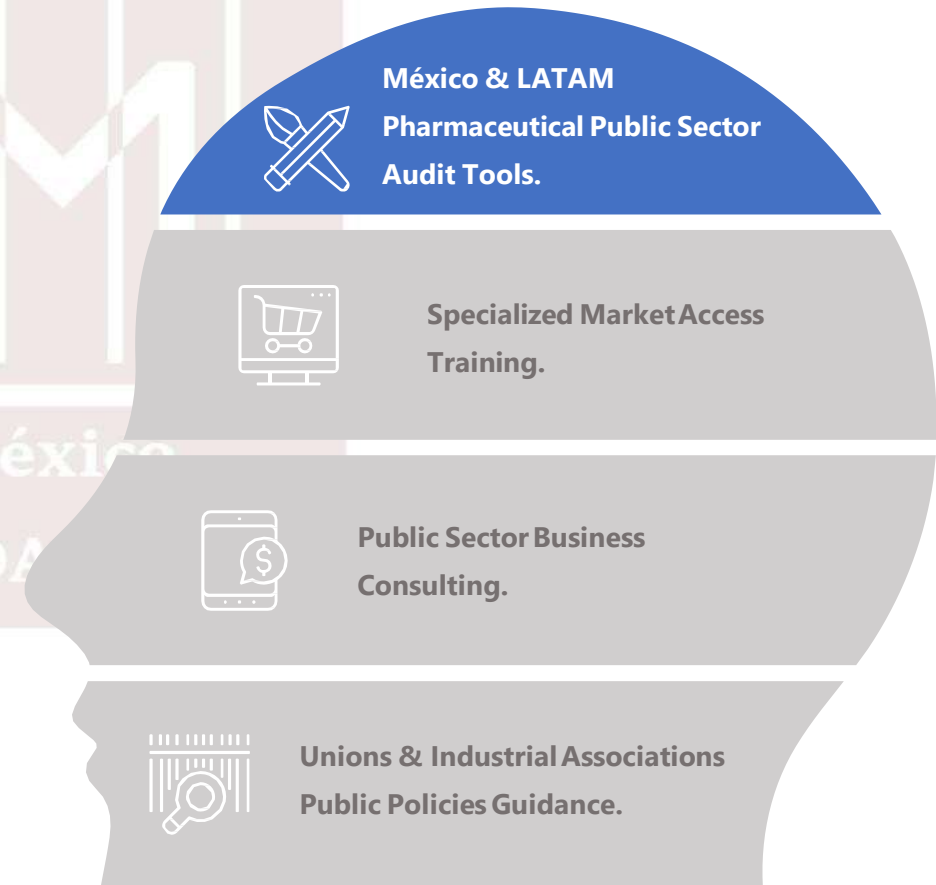
*Even though our level of expertise is very difficult to compete with, we face new competitors every day.*

*Competition helps us keep awake and our clients to have a clearer scope on the capabilities of our business portfolio.*



**INEFAM® is actually the only market audit provider that doesn't charge additional fees for deliverables in special formats.**

*Only market audit tools, clients with annual service contract.*








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# INEFAM: LATAM<sup>®</sup> PUBLIC MARKET AUDIT TOOLS PORTFOLIO

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**1** We process over 1,000 transparency & public accountability procedures per month (*solicitudes de transparencia pública*) in 7 different LATAM countries.

**2** Then, we filter, process, capture and validate all of the public procedures obtained of about over 1,000 public institutions in LATAM markets.

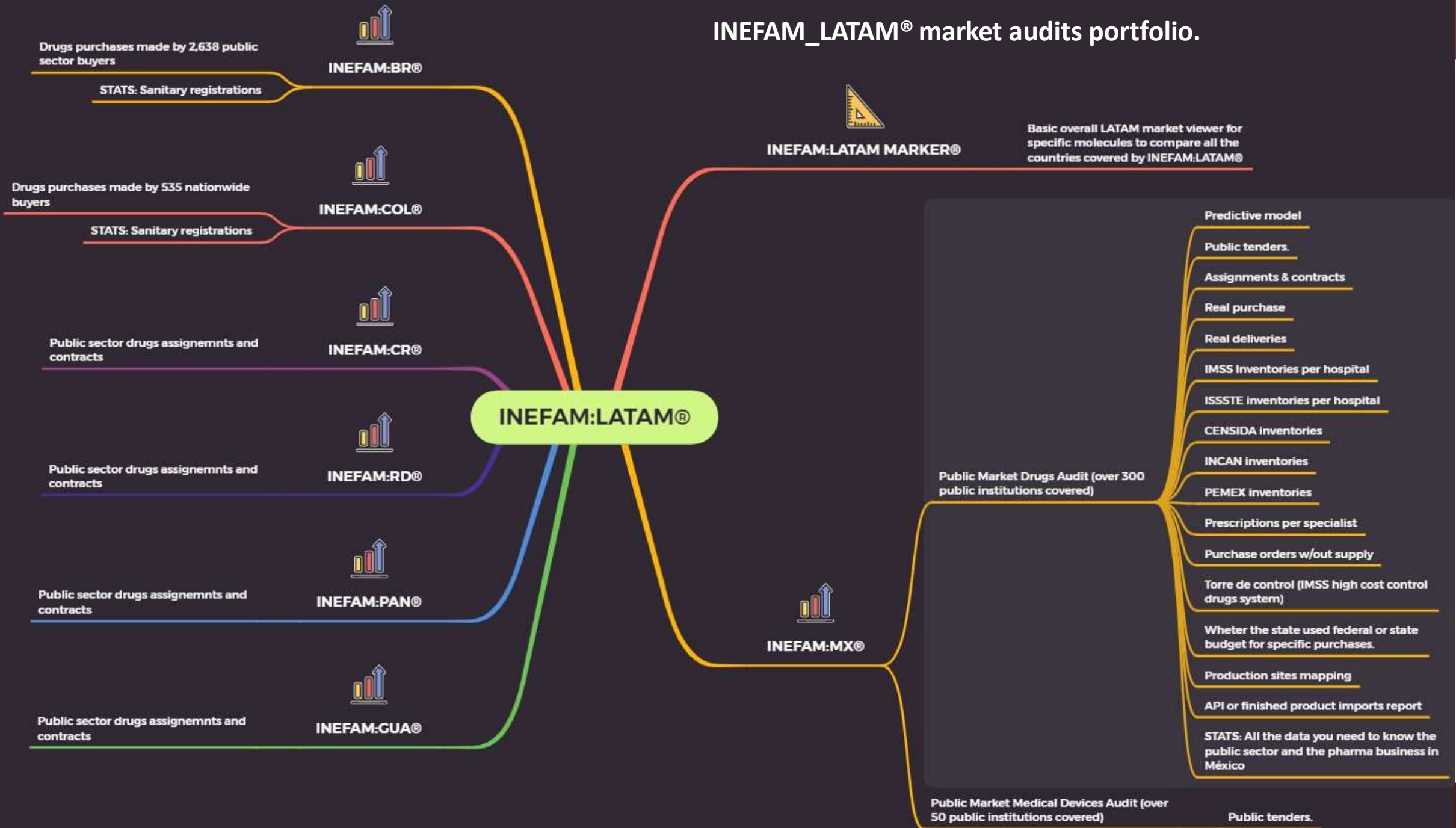
**3** INEFAM is comprised of over 150 million unitary records in a business intelligence datamart with a size surpassing the 75 Gb.



Over 150 millions drug purchases records in the 29 INEFAM:LATAM<sup>®</sup> market audit tools (+75 gigabytes in the central database).



# INEFAM\_LATAM® market audits portfolio.





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## INEFAM:MEX®

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**Over 300 public institutions nationwide covered  
month by month in INEFAM:MEX®**

**We measure drugs, medical devices and healing  
material groups.**

# INEFAM:MEX® Audit Tools Specs (overall public market visibility: 90%):



1 INEFAM FWS

**INEFAM-EWS®**  
 Predictive model. Is a single view of a mix of all the other INEFAM:MEX® market audit tools to predict the possible issues that any given molecule can be experiencing in order to take immediate action.



2 INEFAM LT

**INEFAM-LT®**  
 We report to all of our clients personalized daily reports of published bids and tenders in order to take immediate business opportunity with over 300 mexican public institutions, reporting an average of 5,000 tenders per year.



3 INEFAM FALLOS

**INEFAM:FALLOS®**  
 Once the tender has been successfully assigned to a selected vendor, we present on this business intelligence report the comprehensive tool for analyzing the contracts that are to be accomplished during the year.



4 INEFAM SP

**INEFAM-SP®**  
 Once the contract has been assigned, the public institution buyer starts paying to the selected vendor. In México, by law, these contracts have to be executed minimum at a 40% range, so it's important to keep track of those contracts that are not moving fast to the 100% or 120%.



5 INEFAM ALTAS

**INEFAM-ALTAS®**  
 Over 200 public institutions report in INEFAM:MEX® the product deliveries to their hospitals or warehouses.



6\_Consumos\_CENSIDA\_INCAN



6\_Consumos\_IMSS



6\_Consumos\_ISSSTE



6\_Consumos\_PEMEX

**INEFAM-CONSUMOS®**  
 Shows with an amazing level of detail the inventory indexes (CPM, DPN, DMN, inventory days) used by IMSS, ISSSTE, CENSIDA, INCAN & PEMEX to measure the real drug demand.



9 INEFAM-KPI's

**Customized KPI's:**  
 In order to measure the business performance of the pharma company's teams, we develop customized KPI dashboards for our clients.



7\_INEFAM-RX

**INEFAM-RX®**  
 A powerful BI tool developed to analyze in detail the prescriptions made by aprox 50,000 specialty physicians in over 11 public institutions nationwide.



8 INEFAM PAPS

**INEFAM-PAPS®**  
 The only available public sector Audit to measure the medical devices and the healing materials purchased by over 100 public institutions in México.

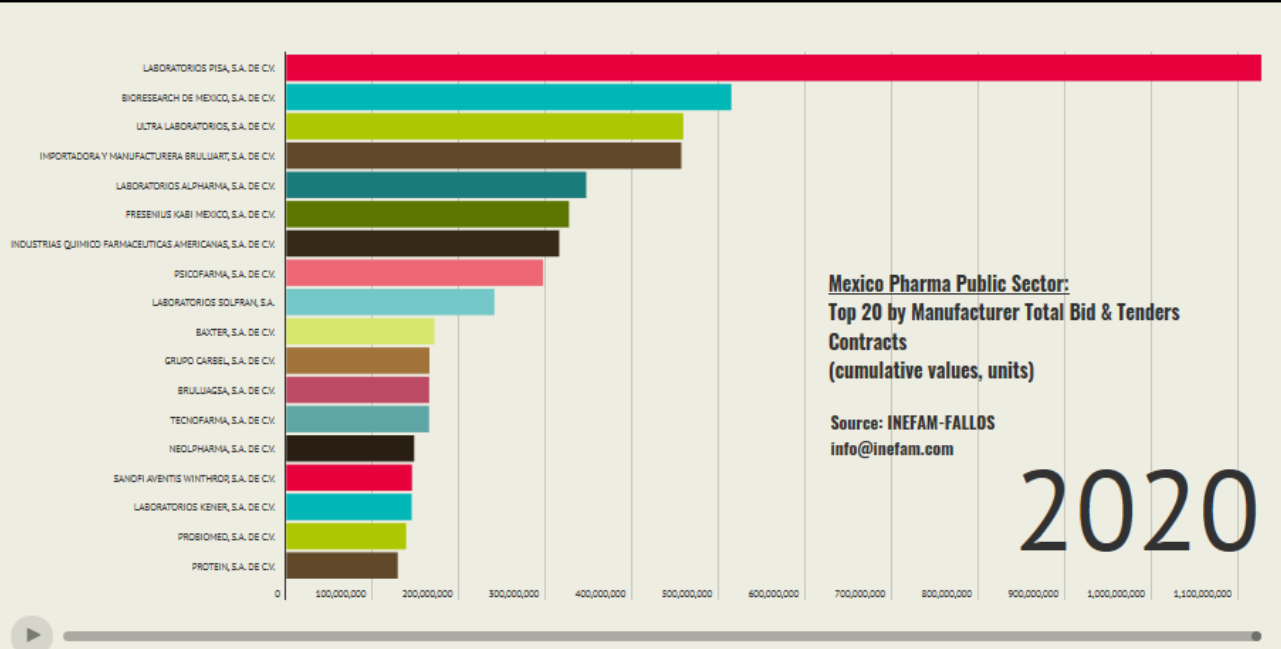


10\_INEFAM STAT

**INEFAM-STAT®**  
 Statistical data useful to know the details of the Mexican sector, like sanitary registrations, reference prices, patent durations, hospitals sanitary certifications, public sector physicians directory, etc.

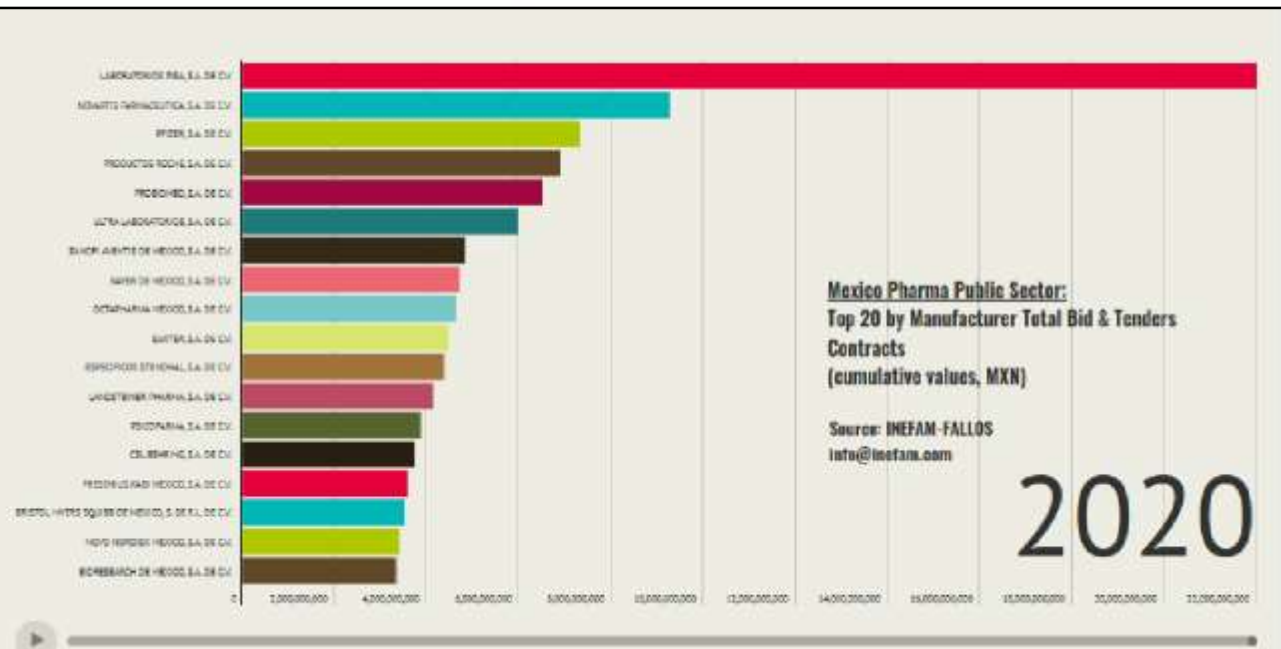


- **New public sector audits:**
- INEFAM-REPORTERS®.
- IMSS TORRE DE CONTROL.
- Federal/State Budget.
- INEFAM:COMEXT.



1) Online sample: Race bar cumulative contracts and assignments per manufacturer, units, 2015-2020. Source: INEFAM-FALLOS®

<https://infogram.com/1pk6y6yqkkwwk2i9x0lk2ew337a39k2jz75?live>



2) Online sample: Race bar cumulative contracts and assignments per manufacturer, values in MXN, 2015-2020. Source: INEFAM-FALLOS®

<https://infogram.com/1p20dnjvp569vju0vwzgg0wqreccr9m7xp6?live>






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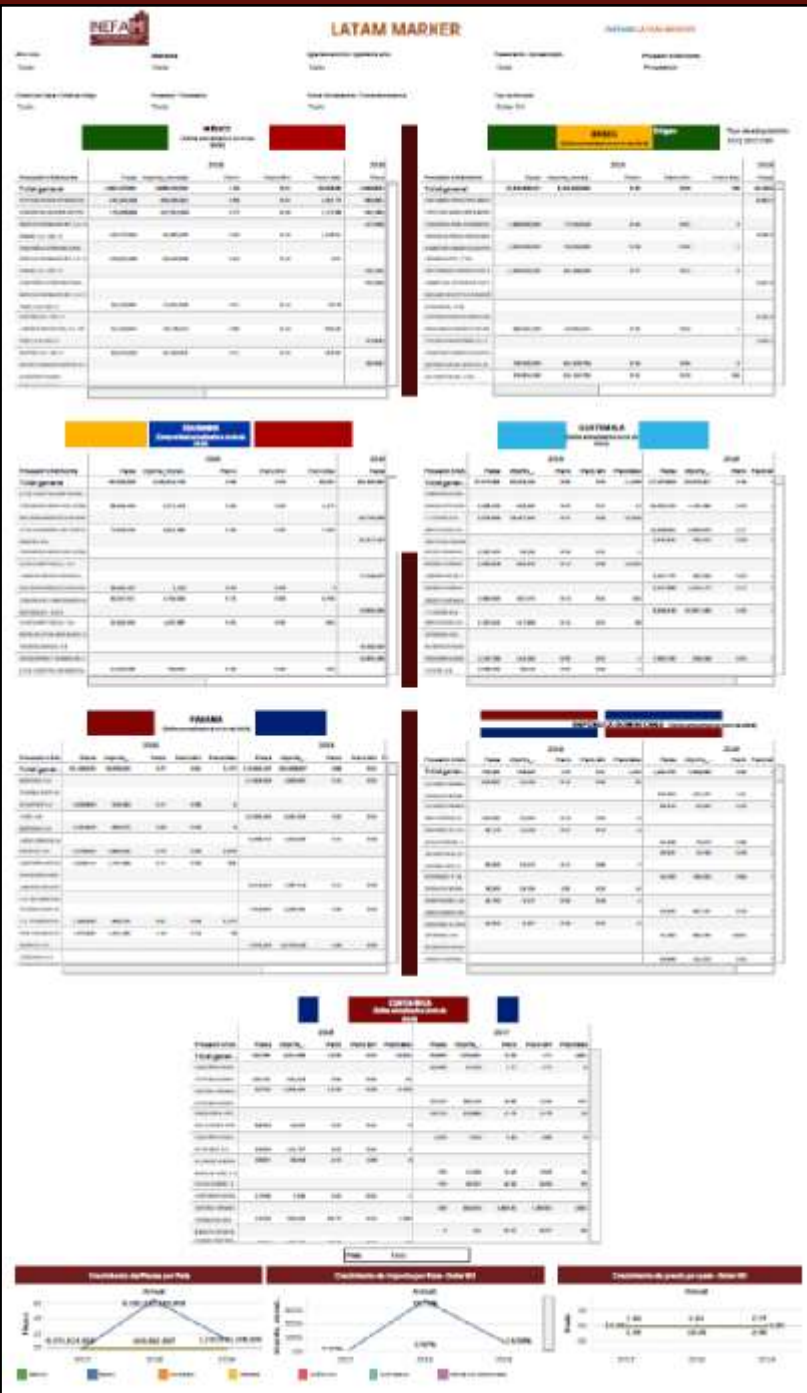
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## INEFAM:LATAM®

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Within a single comprehensive report in a business intelligence environment, the client can perform detailed research of any given molecule in 7 different LATAM countries (México, Brazil, Colombia, Guatemala, Panamá, República Dominicana & Costa Rica), for units, values, manufacturers, sellers and institutions.



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INEFAM-LATAM®  
RANITIDINA

CRITERIO (Varios elementos)

ANUAL	PAIS	Suma de PIEZAS	Suma de IMPORTE_DOLAR	Promedio de PRECIO_DOLAR
2018	BRASIL	157,420,030	\$ 13,523,486.84	\$2.05
2018	COLOMBIA	14,055,636	\$ 10,346,323.47	\$2.76
2018	GUATEMALA	6,813,181	\$ 208,976.60	\$1.51
2018	PANAMA	1,788,122	\$ 254,344.73	\$2.24
2018	REP. DOMINICANA	34,220	\$ 13,505.67	\$5.73
2018	MEXICO	45,854,026	\$ 12,364,576.93	\$0.95
2019	BRASIL	53,390,030	\$ 19,028,733.84	\$50.00
2019	COLOMBIA	9,184,107	\$ 9,294,197.35	\$2.58
2019	GUATEMALA	174,642	\$ 9,326.08	\$9.90
2019	PANAMA	231,664	\$ 90,955.90	\$2.32
2019	REP. DOMINICANA	44,343	\$ 6,853.56	\$11.70
2019	MEXICO	38,938,847	\$ 11,987,548.33	\$0.82
<b>Total general</b>		<b>334,818,648</b>	<b>\$ 76,998,829.33</b>	<b>\$2.67</b>

Client can export data to perform market insights and comparisons for simple and clear intercountry comparisons and market shares.

INEFAM:LATAM® allows queries based on drug definition, country, institution/buyer, manufacturer, type of purchase, among other (all these based on data availability by the source).



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INEFAM-LATAM®  
RANITIDINA

CRITERIO (Varios elementos)

PAIS: BRASIL

ANUAL	INSTITUCION	FABRICANTE	Suma de PIEZAS	Suma de IMPORTE_DOLAR	Promedio de PRECIO_DOLAR
2018	FUNDO MUNICIPAL DE SAUDE	EMS DIVISÃO HORTOLANDA	30	\$ 85.84	\$2.89
2018	FUNDO MUNICIPAL DE SAUDE - ESCADA-PE	FARMACE INDUSTRIA QUIMICO-FARMACEUTICA CEARENSE, LTDA	20,000,000	\$ 2,431,578.99	\$0.12
2018	FUNDO MUNICIPAL DE SAUDE - ESCADA-PE	GEOLAB INDUSTRIA FARMACÉUTICA, LTDA	110,000,000	\$ 2,865,789.47	\$0.03
2018	MUNICIPIO DE ARTUR NOGUEIRA	EMS, S.A.	340,000	\$ 1,886,242.11	\$6.46
2018	MUNICIPIO DE GUARARAPES	EMS, S.A.	80,000	\$ 284,842.11	\$3.56
2018	MUNICIPIO DE PADLUGUA - SECRETARIA DE	FARMACE INDUSTRIA QUIMICO-FARMACEUTICA CEARENSE, LTDA	2,000,000	\$ 1,285,263.18	\$0.64
2018	MUNICIPIO DE PIRAPORA DO BOM JESUS	FARMACE INDUSTRIA QUIMICO-FARMACEUTICA CEARENSE, LTDA	20,000,000	\$ 2,347,315.79	\$0.11
2018	MUNICIPIO DE PIRAPORA DO BOM JESUS	LABORATORIO TEUTO BRASILEIRO, S.A.	15,000,000	\$ 2,821,366.42	\$0.19
2019	CONSORCIO INTERMUNICIPAL DO VALE DO	HYPOFARMA INSTITUTO DE HYPODERMIA E FARMACIA, LTDA	100,000	\$ 19,539.47	\$0.20
2019	FUNDO MUNICIPAL DE SAUDE	FARMACE INDUSTRIA QUIMICO-FARMACEUTICA CEARENSE, LTDA	30	\$ 11,833.99	\$395.13
2019	MUNICIPIO DE ARTUR NOGUEIRA	EMS, S.A.	80,000	\$ 249,612.00	\$3.12
2019	MUNICIPIO DE BAIURU	HYPOFARMA INSTITUTO DE HYPODERMIA E FARMACIA, LTDA	1,020,000	\$ 12,078,263.16	\$11.84
2019	MUNICIPIO DE BAIURU	LABORATORIO TEUTO BRASILEIRO, S.A.	51,600,000	\$ 5,762,693.68	\$0.11
2019	MUNICIPIO DE PEDERNEIRAS	HYPOFARMA INSTITUTO DE HYPODERMIA E FARMACIA, LTDA	300,000	\$ 305,657.89	\$0.21
2019	MUNICIPIO DE SANTA RITA DO PASSA QUATRE	BIOLAB SANUS FARMACÉUTICA, LTDA	70,000	\$ 477,400.00	\$6.83
2019	MUNICIPIO DE SANTA RITA DO PASSA QUATRE	EMS, S.A.	10,000	\$ 73,484.21	\$7.25
2019	MUNICIPIO DE TRABIU	HYPOFARMA INSTITUTO DE HYPODERMIA E FARMACIA, LTDA	10,000	\$ 253,289.47	\$25.33
<b>Total general</b>			<b>228,810,060</b>	<b>\$ 32,352,220.88</b>	<b>\$24.77</b>

- **INEFAM-BRA®:**

- INEFAM-BRA. Over 1,300 MUSD per year in the market audit tool.
- INEFAM-STATSBRASIL. Prices, ex factory, PMVG, ANVISA health records issued.



- **INEFAM-COL®:**
  - INEFAM-COL. Over 2,000 MUSD per year in the market audit tool.
  - INEFAM-STATS COLOMBIA. Prices, INVIMA health records issued.



**Total INEFAM:COL® monitors the expenditure of drugs and medicine purchases of 535 nationwide buyers.**

- **INEFAM-GUATEMALA®:**
  - INEFAM-GUA.
  - INEFAM-STATS GUA.



- **INEFAM-PANAMÁ®:**
  - INEFAM-PAN.
  - INEFAM-STATS GUA.



- **INEFAM-COSTA RICA®:**
  - INEFAM-CR.
  - INEFAM-STATS CR.



- **INEFAM-REPÚBLICA DOMINICANA®:**
  - INEFAM-RD.
  - INEFAM-STATS RD.





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