



# Personalized, decentralized and green

INNOVATION

TREATMENT

SUSTAINABILITY



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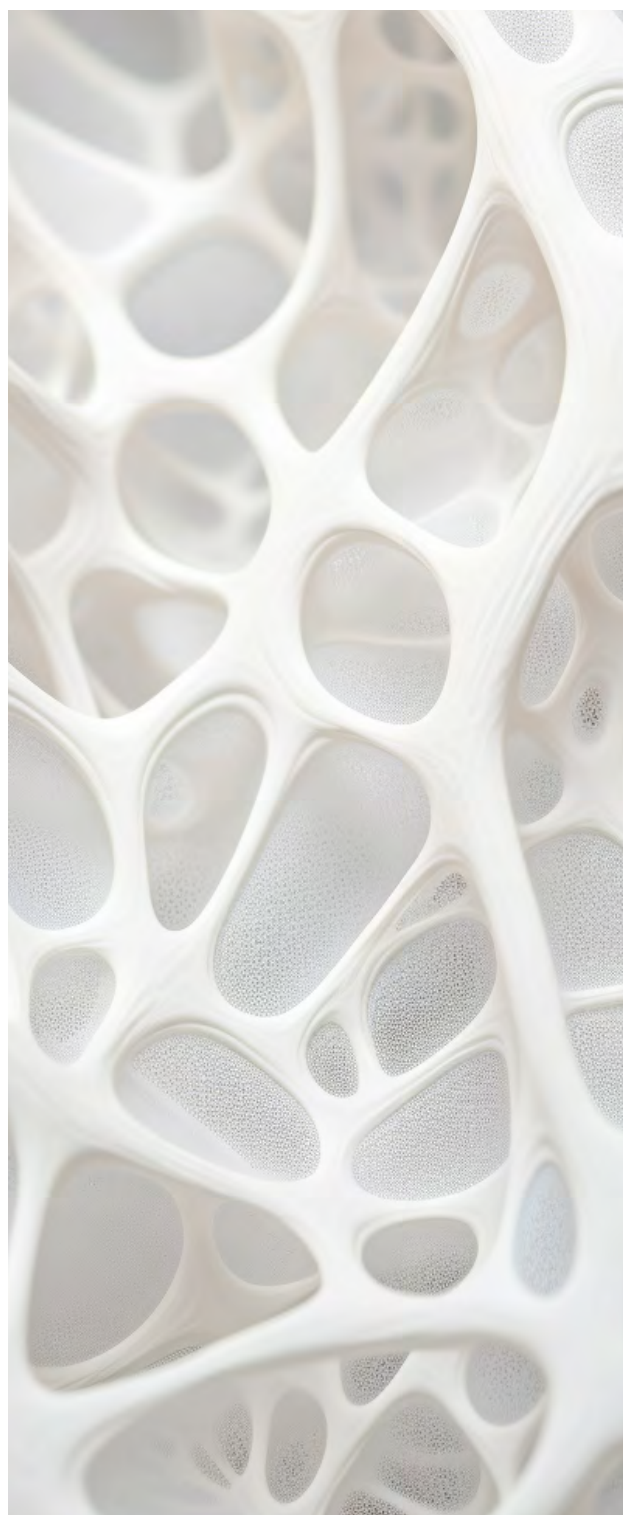


# Challenges and reasons for optimism

In recent years, the conversation about health has broadened. Health is no longer just about physical wellness but also mental and emotional well-being and the sustainability of healthcare services. The COVID-19 pandemic has emphasized the importance of sustainable healthcare, as it caused long waiting lists, vaccination delays, budget issues, and questions about caregivers and healthcare institutions. The aging population, economic inequality, and non-communicable diseases also add to the pressure on healthcare services. As such, governments, institutions, patient groups, the medical industry, and healthcare professionals are under enormous pressure and must find imaginative ways to improve and sustain healthcare services.

This reality strongly marks our 2024 forecast. But we remain hopeful as citizens are increasingly aware of self-care habits. Little by little, society is recognizing the needs of caregivers, who are often unpaid family members and prone to illness because of the stress generated by their role. On the other hand, clinical research is becoming more inclusive to reflect the pluralism of society and include women and minorities in its trials in order to be able to provide better care for them.

The healthcare sector is expected to increase its focus towards the "One Health" concept in 2024. This concept emphasizes the interconnectedness of human, animal, and environmental health. Additionally, there will be an increased emphasis on ESG (Environment, Sustainability, and Governance) regulations. These rules link a company's performance with its responsibility towards all stakeholders.



The healthcare sector is seeing a significant impact from research and technology, which will continue to grow in 2024 and beyond. Bringing the fruits of research and technology to as many patients as possible remains a challenge, but we will see more and better solutions for previously difficult-to-treat diseases.

Big data and artificial intelligence will accelerate drug and vaccine development, and innovation and technology will converge to improve healthcare. Medical technology companies are developing advanced devices, such as pacemakers and glucose monitors, and promoting minimally invasive procedures to reduce hospital stays and speed recovery. Remote patient management is an essential trend, and home automation and robotics help automate household tasks for older adults or people with disabilities. Furthermore, we see that the process of destigmatization of mental illnesses will continue in 2024.

All in all, in the face of real and pressing challenges, healthcare is becoming more personalized, decentralized, and optimized.

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“In the face of real and pressing challenges, healthcare is becoming more personalized, decentralized, and optimized.”

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“83% of citizens want more control over their healthcare.”

## 01. Better habits and increased personal healthcare awareness

The IPSOS Global Trends 2023 survey reveals that people remain concerned about the impact of COVID-19 on healthcare systems worldwide. With the growing demand for healthcare services and an aging population, waiting lists are increasing, causing concern over access to quality medical care. Governments and brands must come together to address how healthcare is monitored, paid for, and delivered.

In this context of overburdened services, 83% of citizens want more control over their healthcare while still trusting regulatory bodies, science, and vaccines to solve major health issues.

People are increasingly interested in self-care, which the World Health Organization defines as the “ability of individuals, families and communities to promote health, prevent disease, maintain health, and cope with illness and disability with or without the support of a health worker.” This includes educating themselves on treatments and medications,

health policies, and consuming vitamins, food supplements, and immune system products, as well as including physical exercise as part of their self-care routine.

According to a Google survey, 40% of consumers research OTC products online before making a purchase, while 13% use social media as a source of information. Consumers seek specific product information, such as usage and dosage (40%), recommendations and opinions from other patients (39%), side effects and risks (38%), comparisons with other similar products (25%) and manufacturer details (19%). Trust, quality, convenience, pharmacist recommendations, price, and available product studies are the main factors driving the choice of distribution channel.



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## 02. Empowering caregivers to improve patient health

Patients, caregivers, and their families are the ones who understand best the full impact of an illness.

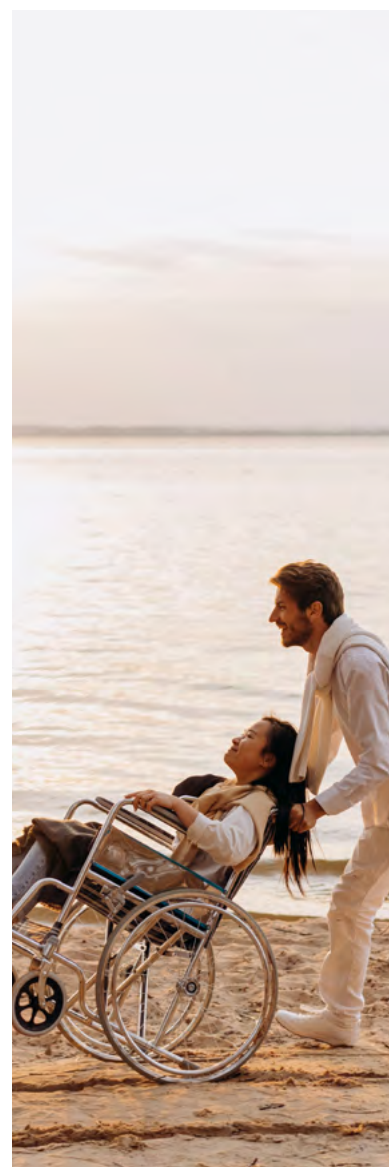
Caregivers are crucial in helping patients feel better, providing emotional support, helping with daily activities, and coordinating medical care. Regardless of whether they are family members or professionals, their goal remains the same: to provide care and support at home, in hospitals, or other healthcare settings.

Caregivers' duties include performing daily tasks such as bathing, eating, or administering medications, organizing daily activities and medical care, and making health and financial decisions. Several studies have pointed out the significance of caregivers in improving patient health and the need for programs to support their role.

Unfortunately, caregivers often face adverse health consequences due to the lack of personal space for social, leisure, or self-care activities. In the long term, this situation can increase healthcare costs and more patients within the same family nucleus.

Additionally, there is a lack of accurate information on the number of caregivers. According to the U.S. Centers for Disease Control and Prevention, 25% of adults aged 18 and older require ongoing assistance with daily tasks. The Inter-American Development Bank also found that 25% of older adults in Mexico require informal home care due to long-term implications, such as chronic diseases or functional disability. Non-compliance with treatment is a problem in various medical interventions, including rheumatology, cardiology, pediatrics, and psychiatry. This non-compliance is even more significant in chronic diseases, where adherence must occur indefinitely, which translates into greater difficulty in managing patients and achieving therapeutic objectives, generating high healthcare costs.

Caregivers' role in improving patient health should not be overlooked, and it is important to develop programs that recognize and support their essential role in healthcare.



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## 03. Increased pressure on health system sustainability

Managing healthcare is an ongoing challenge for states and other healthcare providers.

The goal is to create sustainable models that optimize resources and provide comprehensive care to the greatest number of people. However, this is particularly difficult in the wake of the pandemic, which has placed enormous pressure on healthcare systems and left long waiting lists.

Additionally, the aging population is increasing the need for care and medications, while social inequalities and noncommunicable diseases are also impacting healthcare systems, with mental health-related problems particularly affecting young people.

"Mental, emotional, economic and other aspects," says the IPSOS report mentioned above, "are becoming part of the health conversation, broadening our collective understanding of what it means to have 'good health.' The pressure is mounting.

As the United Nations Sustainable Development Goals program has pointed out, before the pandemic, progress had been made in improving global health, reducing infant and maternal mortality rates, and increasing life expectancy. Due to the pandemic, healthcare systems have had to adjust their services and treatments to tighter budgets, which has impacted their sustainability.

It is now more critical than ever to ensure universal, equitable, and sustainable access to healthcare systems while considering social and environmental perspectives. However, many of the challenges healthcare providers face are linked to finances, making it necessary to find new ways to increase investment in healthcare systems and make them more efficient.

One way to address the financial challenges faced by healthcare providers is to collaborate with actors such as pharmaceutical companies, health technology companies, medical devices, and diagnostic methods. By partnering with governments, they can facilitate access to medical devices and drugs that can improve and extend the lives of citizens. This collaboration is essential for sound economic and social development.



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## 04. Greater transparency and inclusion in clinical research

Clinical trials need to be diverse to ensure that drugs are available to treat all people. It was not always this way. In 1977, the [US Food and Drug Administration](#) recommended excluding women of childbearing age from early-stage drug trials, including women using contraception and those with vasectomized partners. This policy meant that there was little data on how drugs affected women.

From the start, women activists protested against this exclusion, and in 1985, a Public Health Service Task Force report recommended long-term research on how behavioral, biological, and social factors affect women's health. In 1993, the US Congress drafted the "Inclusion of Women and Minorities as Subjects of Clinical Research" policy to ensure that women and minorities were included in all clinical research.

The National Institutes of Health (NIH) now ensures that clinical trials include women and minorities. They design trials to analyze whether variables affect these groups differently than others. Cost is no longer a valid reason for excluding any group from testing. This focus on diversity in clinical trials is necessary to ensure that drugs are available to treat everyone.



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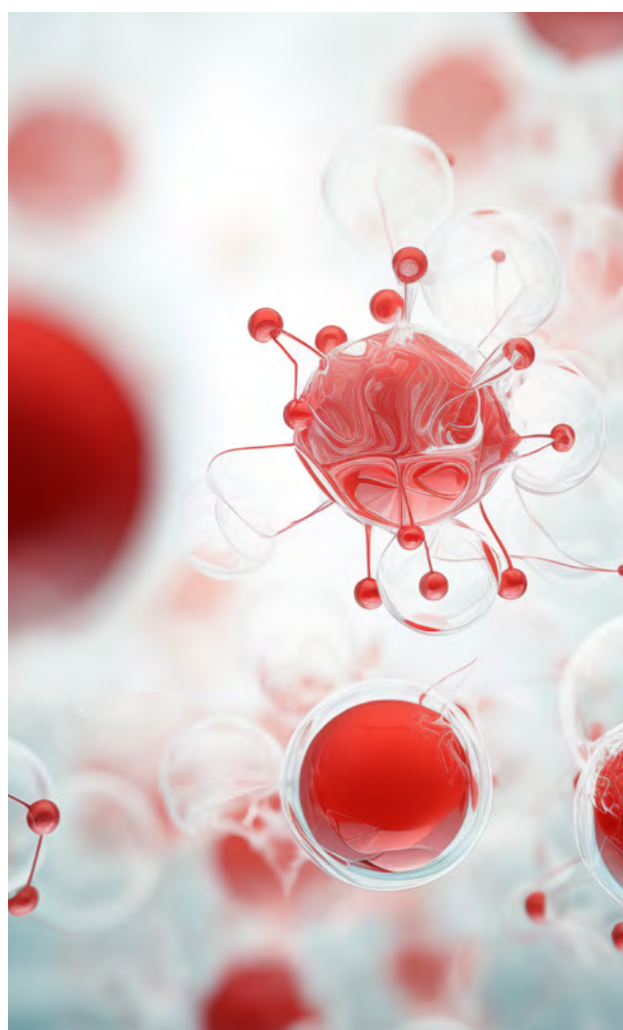
## 05. One Health approach: unifying environment, animals and human health

The One Health approach focuses on human, animal, and environmental health interconnectedness. This approach has gained traction in recent years and is expected to become increasingly significant. With population expansion into new areas, the COVID-19 pandemic, and changes in environmental conditions, it is crucial to have a comprehensive approach to global health that considers all of these factors.

Human health is intrinsically linked to animal and environmental health. In fact, the [World Health Organization](#) (WHO) estimates that 60% of known infectious diseases come from animals. Zoonoses, which are infections that can be passed from animals to humans (WHO, 2020), are a growing concern. But it is important to keep in mind that diseases can also be transmitted from humans to animals. This can have significant impacts on both domestic and wild animals.

The One Health approach goes beyond studying disease transmission between animals and humans. It also includes economics, environment, and food safety. According to the World Organization for Animal Health, animal diseases account for more than 20% of losses in animal production worldwide.

When more than 25% of the original forest cover is destroyed, there is an increase in human-livestock interactions with wild animals. Additionally, around 75% of people living on less than US\$2 a day depend on agriculture and livestock for their survival.



In a world where borders are becoming increasingly blurred, collaboration at the local, regional, and global levels is essential. Governments must design strategies to address current problems and prevent and mitigate future risks. This involves implementing policies to protect public health, plants, and animals.



[www.woah.org](http://www.woah.org)



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## 06. Corporate social responsibility: the Sustainable Development Goals and ESG

Companies are facing increased pressure to consider the impact of their products and services on the environment and society. People are becoming more aware of environmental, social, and governance issues, and younger generations believe that it is crucial for companies to focus on their impact on the planet and people, a trend that continues to gain ground among their customers. This also applies to companies in the healthcare sector.

The social aspect of ESG is about a company's relationship with society, including employees, suppliers, and customers. It covers measures that improve employees' quality of life, such as flexible working hours, work-life balance, staff training, and gender equality. It also includes collaboration with educational, cultural, or NGO projects. All these social criteria align with the United Nations 2030 Agenda. SDG 1 (No poverty), SDG 3 (Good health and well-being), SDG 5 (Gender equality), along with several targets of SDG 8 (Decent work and economic growth) and SDG 10 (Reducing inequalities) are the most relevant goals. WHO confirms that social inequality factors such as ethnicity, socioeconomic status, or gender are closely linked to global health. Therefore, companies should take a multidisciplinary approach to corporate social responsibility to address the disparity in access to treatment, prevention, and resources.

Companies that focus on social criteria contribute to the objective of improving public health. For instance, ensuring good working conditions and promoting mental health and well-being among employees can significantly impact overall public health. Additionally, companies' involvement in projects that address poverty, education, and gender equality can have broader social impacts that benefit public health, such as reducing disease burden and improving access to health services.



Nevertheless, while many companies are already acting, there is a long way to go. Public-private collaboration is crucial to establishing public policies. Companies must take action and communicate them transparently and coherently, always aligned with the ESG sustainable development objectives set forth by the United Nations.



## 07. Destigmatizing mental illnesses

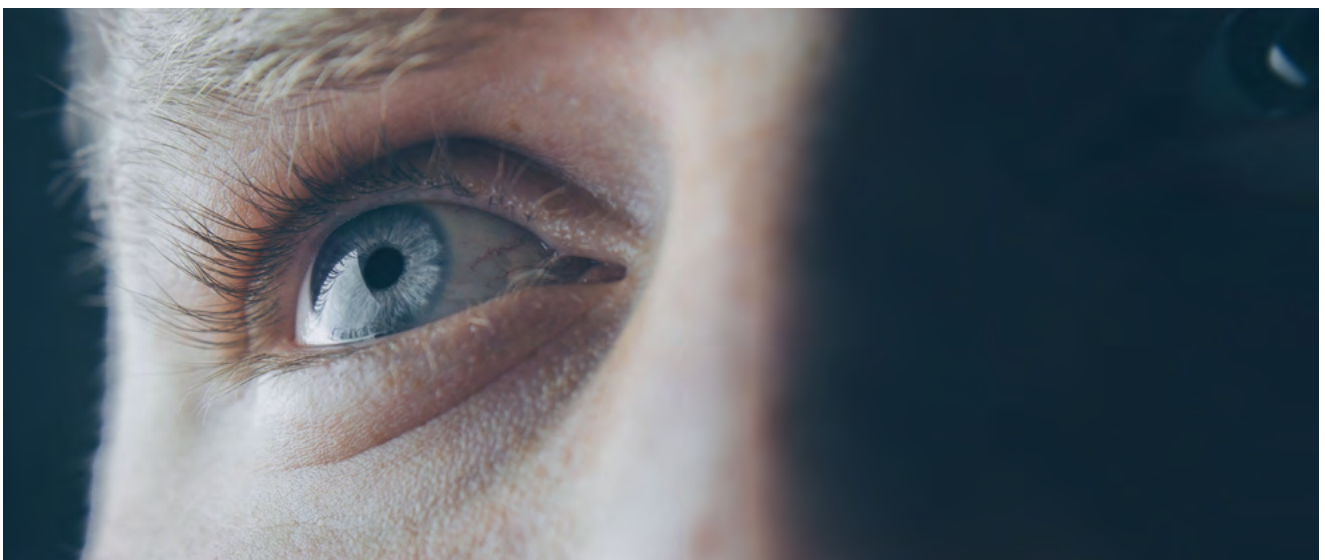
DESTIGMATIZING MENTAL ILLNESS IS VITAL FOR PUBLIC HEALTH AND SOCIAL WELL-BEING.

Destigmatizing mental illness is vital for public health and social well-being. According to [WHO](#), in 2019, one in eight people had some form of mental health disorder. Due to the pandemic, the number has increased exponentially in 2020. Apart from the health crisis, other factors such as poverty, violence, inequality, and environmental degradation have also contributed to the rise of mental disorders. These determinants, along with psychological, biological, social, economic, geopolitical, and environmental factors, have made mental disorders more prevalent than ever before.

In this globalized world, where technological advances influence

young people, and life expectancy is increasing globally, it is imperative to address mental health from an institutional, medical, and social approach. According to the American Journal of Public Health, prioritizing psychiatric epidemiology and public mental health in treatment, management, and prevention strategies has never been more critical.

Effective communication strategies are crucial in addressing mental health. Social media and the media play an increasingly influential role in shaping opinions, self-esteem, and behaviors. Therefore, it is essential to design and implement effective communication plans that avoid stigmatizing the problem



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“In this globalized world, it is imperative to address mental health.”

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and encourage people to seek help. These initiatives can radically transform public perception of mental health, encouraging a more open and transparent conversation and helping those suffering from disorders find the support they need.

Experts suggest that creating communication strategies that combine personal stories with conversations about structural barriers to treatment for mental illness can increase the public's willingness to invest in the treatment system. Therefore, it is especially important to continue efforts to destigmatize mental illness since widespread stigma is directly related to decreased support for many policies designed to benefit these groups.

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[ps.psychiatryonline.org](http://ps.psychiatryonline.org)



## 08. Increased access to pharmacological innovation and health technologies

With shrinking budgets for healthcare systems, access to drug innovation will continue to be a challenge for millions of patients, especially in developing countries.

The World Health Organization (WHO) has identified equitable access to medicines and other health technologies as a prerequisite for universal access to health services. However, the WHO recognizes the need for appropriate regulatory frameworks and acknowledges that costs represent a challenge for health systems.

Today, the availability of innovative drugs remains limited, with an average of only 13% availability for 18 drugs for oncology and rare diseases in Latin America, per the latest analysis carried out by the Latin American

Federation of the Pharmaceutical Industry FIFARMA. Furthermore, the time taken for drugs to reach some Latin American countries from the time of approval by the U.S. FDA or the European Medicines Agency varies significantly, ranging from 94 days in Argentina to 1672 days in Chile, with an average of 1371 days in Mexico.

Decision-makers from governments, hospitals, insurers, industry, and patient groups need to collaborate to address the issue

of access to innovative medicines and health technologies. They need to propose actions ranging from regulation to the value and cost of innovation, with the patient at the center of decisions. Companies researching and developing innovation have introduced innovative access models to assist governments in deciding on including medicines and health technologies in social security systems. Governments must review and update the regulatory framework continually. The most important thing is to ensure that innovation reaches those who need it the most to improve and care for their lives as quickly as possible.



[amiif.org](http://amiif.org)



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## 09. More and better solutions for devastating diseases with very few treatment options



Personalized medicine is a significant breakthrough in pharmacological research. It highlights the success of the biopharmaceutical industry medical and scientific communities in creating custom treatments for each patient. This involves combining standardized therapies, such as chemotherapy and radiotherapy, with new treatments like immunotherapy, which has a strong scientific basis. Innovative therapies like gene and cell therapies are also being explored to achieve better patient outcomes.

These treatments are complex and costly and require will and coordinated efforts to ensure that the therapeutic advantages and associated risks are understood and reach patients as soon as possible. Dr. Santiago Roura Ferrer, an associate professor at the Central University of Catalonia's Faculty of Medicine, discusses a new cancer treatment in an article published in the Conversation. He describes this therapy as a revolutionary technology that takes out immune cells named T cells or lymphocytes and reprograms them to find and destroy cancer cells before reintroducing them to the same patient.

According to the expert, the process starts by collecting white blood cells from the patient's blood with a fully automated procedure named leukapheresis. The T cells are then separated and sent to the laboratory to be modified by adding the chimeric CAR antigen receptor. This receptor enhances the autologous T cells' ability to bind to a specific antigen in cancer cells, a key step that turns T cells into CAR-T cells.

**PERSONALIZED MEDICINE IS A SIGNIFICANT BREAKTHROUGH IN PHARMACOLOGICAL RESEARCH. IT HIGHLIGHTS THE SUCCESS OF THE BIOPHARMACEUTICAL INDUSTRY MEDICAL AND SCIENTIFIC COMMUNITIES IN CREATING CUSTOM TREATMENTS FOR EACH PATIENT. THIS INVOLVES COMBINING STANDARDIZED THERAPIES, SUCH AS CHEMOTHERAPY AND RADIO THERAPY, WITH NEW TREATMENTS LIKE IMMUNOTHERAPY.**

Finally, the CAR-T cells are multiplied through a process that can take several weeks to reach [the required amount](#) for every treatment. This development is critical because each type of cancer has its own antigens, and researchers can create a CAR for each. Although the development process is still complicated, there are potential side effects, and it is expensive and inaccessible to many patients who need it. The progress in immunotherapy based on these cells is significant. It is an example of the benefits of personalized medicine that has continued to surprise us with its advances, and with each breakthrough, more patients can be saved, and their quality of life can be improved. Medical congresses in 2024 will feature a range of new advances, primarily aimed at treating oncological, immunological, and infectious diseases. However, these diseases will continue to be devastating in the foreseeable future, and many of them will only have limited treatment options available.



[asco.org](#)



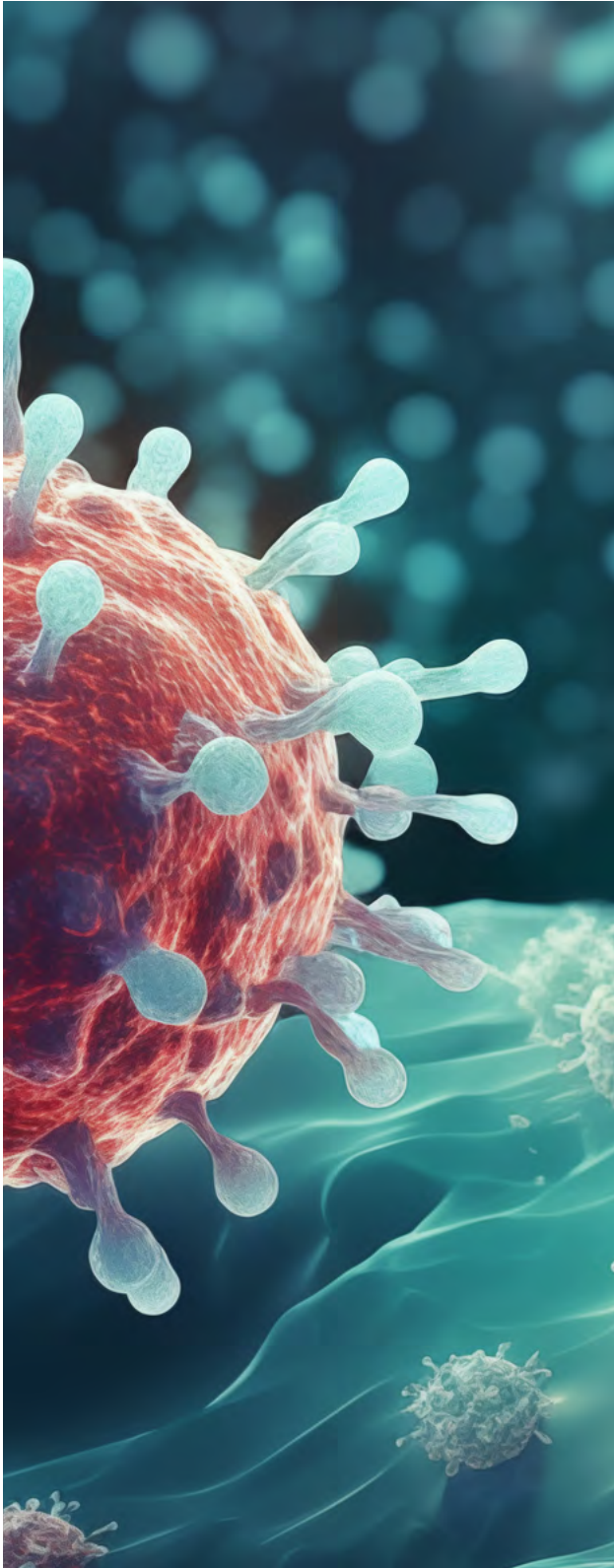
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## 10. Big data and artificial intelligence accelerate drug and vaccine development.

In recent years, big data and artificial intelligence (AI) have played a critical role in advancing drug development and healthcare. The global healthcare-related big data market is expected to grow exponentially, from approximately \$11.5 billion in 2016 to nearly \$70 billion in 2025, according to Statista.

Despite the healthcare industry's cautious approach to new technologies, concerns about privacy and data security are outweighed by patient and healthcare systems' benefits. Technology is viewed as a tool that can optimize processes, such as shortening drug development timelines that can cost up to \$2.6 billion and yield only one successful drug out of 10,000 compounds, according to the [Mexican Association of Pharmaceutical Research Industries](#) (AMIIF in Spanish).

Integrating technologies like AI and machine learning can significantly reduce lead times from decades to one or two years and improve efficiency in identifying antigens and creating effective treatments.

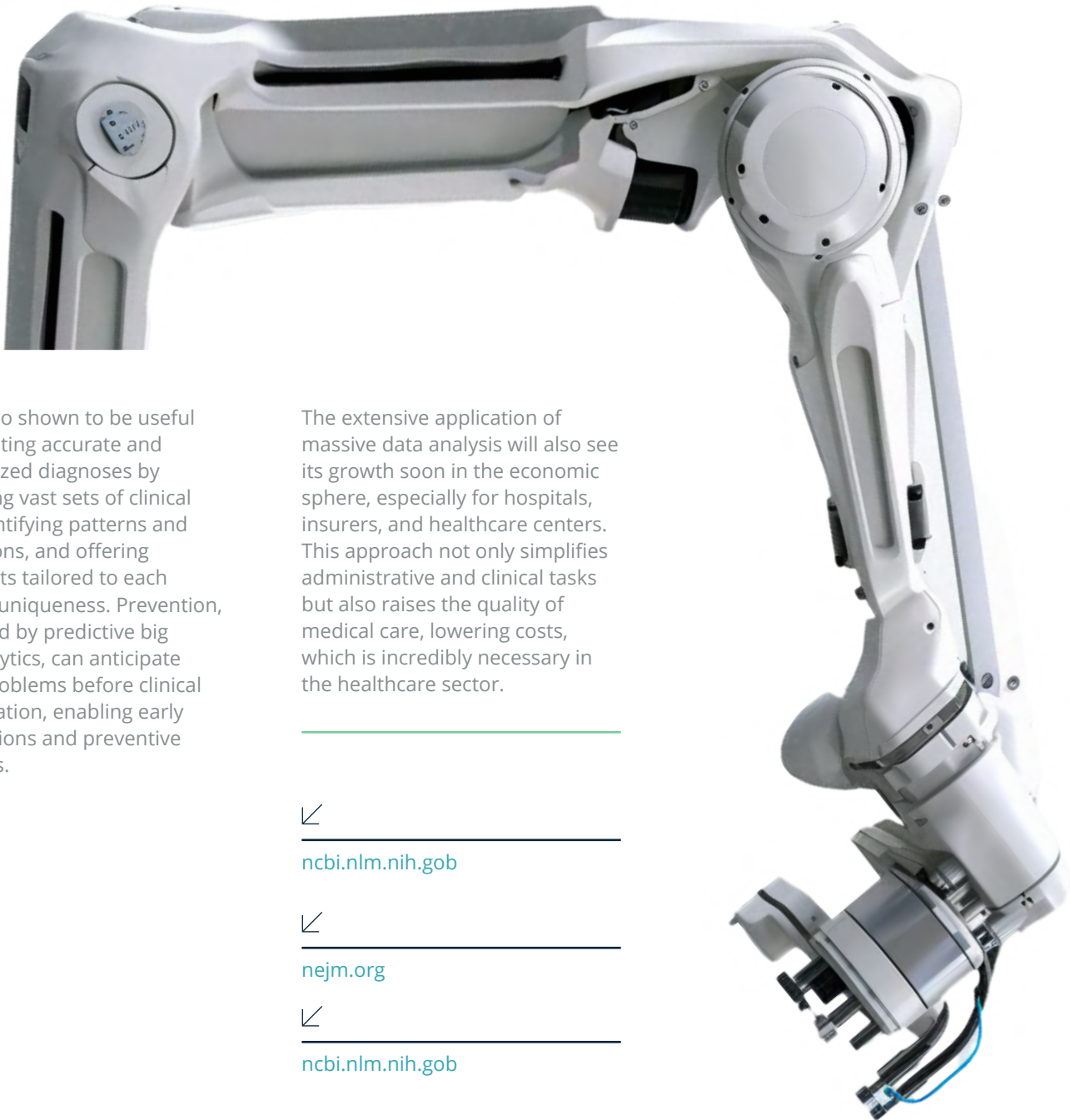
The COVID-19 vaccines are a prime example of how intelligent processing of vast amounts of data has streamlined development. Previously, it took 5 to 15 years to identify potential antigens, the crucial first step for an effective vaccine. This process was reduced to one or two years thanks to innovative reverse vaccinology (RV) technology introduced in 2000. Now, with the help of machine learning (ML) and artificial intelligence (AI), RV tools have accelerated the discovery and optimization of new antiviral treatments. These technologies have driven rapid research and efficient COVID-19 vaccine development and will continue to be essential for speeding up research in the coming years.

The report "Unlocking the Potential of AI in Drug Discovery," prepared by Wellcome, confirms the accelerated growth in research and funding, particularly in therapeutic areas such as oncology, COVID-19, and neurology, in high-income countries and China over the past five years. The report also highlights the key role of "AI-first" biotech companies that have structured their research and development workflows around artificial intelligence tools.



“Integrating technologies like AI and machine learning can significantly reduce lead times from decades to one or two years”





AI has also shown to be useful in generating accurate and personalized diagnoses by processing vast sets of clinical data, identifying patterns and correlations, and offering treatments tailored to each patient's uniqueness. Prevention, supported by predictive big data analytics, can anticipate health problems before clinical manifestation, enabling early interventions and preventive strategies.

The extensive application of massive data analysis will also see its growth soon in the economic sphere, especially for hospitals, insurers, and healthcare centers. This approach not only simplifies administrative and clinical tasks but also raises the quality of medical care, lowering costs, which is incredibly necessary in the healthcare sector.

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# 11. Immunization: time for seniors and children

Vaccines are an essential part of medicine, but they are facing a crisis due to the decrease in vaccination levels caused by the focus on containing the COVID-19 pandemic. This situation has caused delays in vaccination programs, primarily affecting children and leaving adults behind in the immunization campaign.

Not vaccinating children poses serious risks, from outbreaks of preventable diseases to increased child mortality and higher long-term healthcare costs. Unfortunately, in 2021, nearly 40 million children did not receive their measles vaccine, according to data from the World Health Organization (WHO) and the U.S. Centers for Disease Control and Prevention (CDC). This decline represents a major setback in global efforts to eliminate measles, exposing millions of children to the risk of infection.

Now, the focus shifts to adults, who are becoming the new protagonists of vaccination. With the rise of the anti-vaccine movement, adults must play an active role in immunization. [Dr. Gregory Poland, leader of the Mayo Clinic Vaccine Research Group](#), stresses the

importance of vaccines for older adults, noting that as we age, our immune systems weaken, resulting in more serious infections in the older population. To this end, Mayo Clinic is actively working to tailor vaccines to provide optimal protection for older adults. Effective communication by health authorities and the medical community is crucial to boost immunization in this group, counteracting misinformation and raising awareness of the importance of keeping their vaccinations up to date. Although vaccines do not guarantee total immunity, they significantly reduce the risk of complications, ensuring that older people can experience milder symptoms and avoid serious consequences such as hospitalization or death. The "Great Catch-Up" initiative, launched by WHO, is an expanded effort to raise childhood vaccination levels to pre-pandemic levels and beyond. This initiative should be extended to adults, emphasizing the importance of staying up to date with recommended vaccines to prevent preventable diseases. It should also remind us of our collective responsibility to protect public health.

The vaccination crisis, exacerbated by the pandemic, demands urgent attention. We need to close the childhood immunization gap and ensure an effective and focused campaign for adults, who are essential to maintaining collective health and preventing the spread of preventable diseases.



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# 12. New technologies bringing health closer to patients

The future of healthcare lies in the convergence of technology and innovation, which are driving significant advances in medical care and bringing it closer to the patient.

Medical technology companies are at the forefront of developing advanced medical devices like pacemakers and glucose monitors. They also promote minimally invasive procedures that reduce hospital stays and speed up recovery.







Within this context, remote patient management has become a crucial trend in healthcare, particularly in treating cardiovascular diseases. It enables constant monitoring and effective remote medical care. Virtual reality (VR) technologies are also playing a significant role in alleviating pain, anxiety, and post-traumatic stress disorder. These technologies have revolutionized healthcare by providing patients with options that improve their quality of life, especially for older adults. Home automation and robotics also complement this transformation by automating household tasks, making life easier for older adults and people with disabilities. Big Data and artificial intelligence (AI) are becoming indispensable in telemedicine. Collecting real-time patient data facilitates informed virtual consultations, remote diagnoses, and effective follow-ups. This technology is also playing a crucial role in overcoming geographical barriers and reaching patients in remote areas, facilitating access to quality medical care, especially in developing countries. Less invasive surgeries are currently in the spotlight of the technological revolution in healthcare. Laparoscopic and robotic techniques are paving the way for surgical



interventions that reduce trauma, speed recovery, and improve the precision of the procedure. Robotic-assisted remote surgery is becoming increasingly feasible and safe, opening the door to the global availability of surgical expertise.

Online continuing medical education is another emerging trend. With the increasing global use of the Internet, online training has become an essential component for healthcare professionals, institutions, insurers, governments, and sponsors. It offers greater efficiency and directly impacts clinical practice, providing broader access to quality medical education.

The future of healthcare lies in the convergence of technology and innovation. Medical technology companies are developing advanced devices that improve medical care and bring it closer to the patient. These converging trends will mark a milestone in the evolution of healthcare and redefine it through technology, providing broader and more efficient access to quality medical services.

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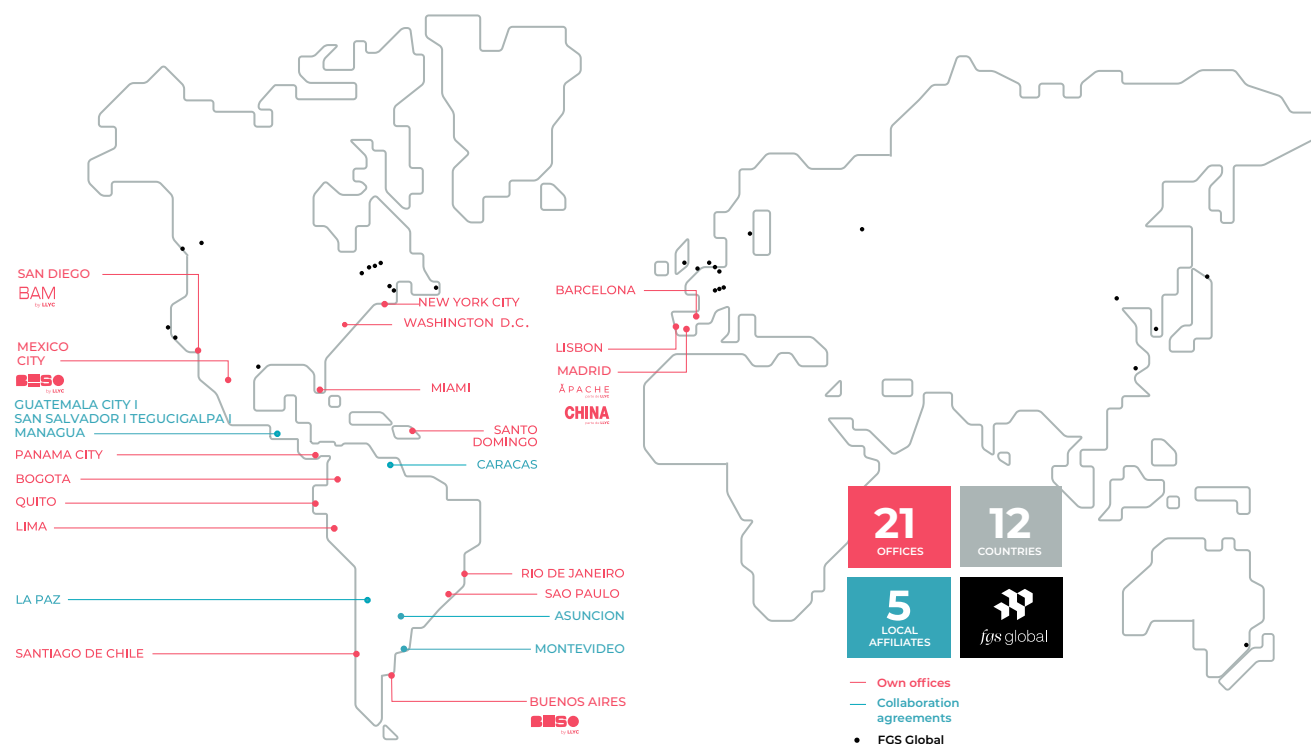
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Forecast Healthcare 2024

INNOVATION

TREATMENT

SUSTAINABILITY

