

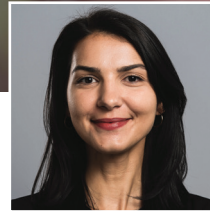
# What you need to know about key stakeholders and P&MA dynamics in Mexico for 2023 and beyond



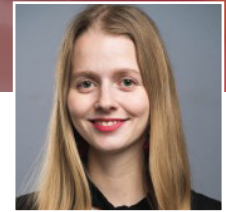
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## Mexico

Mexico is the second-largest pharmaceutical market in the region. It has the lowest percentage of GDP spent on healthcare of the 5 main markets by a substantial margin. Mexico has a mixed and complex health system comprised of a public sector with multiple stakeholders and institutions alongside a robust private sector. IMSS, ISSSTE and INSABI are the three main payers in the public sector where INSABI is financed by government funds only, while IMSS and ISSSTE are also funded through companies and workers' contributions. The private sector is funded through out-of-pocket payments and private insurance.

Regulatory processes have historically been slow and disorganised. The Mexican Regulatory Agency (COFEPRIS) is currently implementing new changes aimed at simplifying and accelerating regulatory approvals. Market access has no well-established process and National Centre for Health Technology Excellence (CENETEC), Mexico's HTA agency, lacks relevance in this process. In recent years with the current administration, relations with the local industry have been complicated. Medicine supply shortages have been common, with general purchases conducted through United Nations Office for Project Services (UNOPS) and, with direct purchases being the norm instead of previously more formal national tendering processes.

Willingness to pay for advanced therapies is growing but understanding the hurdles and how to reach the relevant stakeholders remains complicated. Despite the challenges, the market size and future growth opportunities make Mexico a very interesting market to participate in.



**Table 3:** Key market access stakeholders in Mexico

RESPONSIBILITY	STAKEHOLDER		DESCRIPTION
Policy	SSA	Secretaría de Salud–Ministry of Health	Responsible for health policy and includes all mayor national speciality research institutes (e.g., neurology, cardiology and cancer institutes)
	CSG	Consejo de Salubridad General–National Health Council	Health authority reporting to the president and responsible for the Compendio Nacional de Insumos para la Salud, which is the national reimbursable medicine formulary
Regulatory	COFEPRIS	Comisión Federal para la Protección de Riesgos Sanitarios–National Medicine Agency	National regulatory agency
HTA	CENETEC	Centro Nacional de Excelencia Tecnológica en Salud–National Health-Technology Excellence Centre	Evaluates the safety, efficacy/effectiveness, and efficiency of the health technologies proposed for incorporation into the National Compendium of Medicines. However, it currently has little relevance in the market access process
Pricing	CCNPMIS	Comisión Coordinadora para la Negociación de Precios de Medicamentos e Insumos para la Salud–Price Negotiation Commission	The objective is to negotiate the price of medicines contained in the basic formulary for basic-level medical care and in the Compendio Nacional de Insumos para la Salud
Payers/ Providers/ Others	INSABI	Instituto de Salud para el Bienestar–National Health and Well-being Institute	Responsible for providing healthcare services to all people not affiliated to any other public social security institutions
	IMSS	Instituto Mexicano del Seguro Social–Mexican Social Security Institute	Responsible of providing healthcare services to salary workers from the private sector
	ISSSTE	Instituto de Seguridad y Servicios Sociales de los Trabajadores del Estado–Social Security Institute for Government Workers	Provides healthcare services to government workers
	SEDENA	Secretaría de la Defensa Nacional–Army Ministry	Provides healthcare services to Army personnel and their families
	MARINA	Secretaría de Marina–Navy Ministry	Provides healthcare services to Navy personnel and their families
	PEMEX	Petróleos Mexicanos–Mexican Petroleum Company	Provides healthcare services to its employees and their families
	Private	Seguro Privado–Private Insurance	Multiple hospital chains and national and international private health insurance companies operate in Mexico

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