

Luciano Marques - President, Alcon, Brazil



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Luciano Marques, president of Alcon Brazil, provides insights into recent investments and innovative initiatives aimed at strengthening Alcon's relationships with its partners and customers in Brazil, and also documents the heightening of the affiliate's market access and medical affairs capacities and explains how these aspects have contributed to drive the impressive double-digit growth of Alcon in Brazil over the past year.

You have worked abroad for almost eleven years and held senior executive positions at Novartis in Argentina, Spain, and South Africa, a country where you have headed Novartis' pharmaceutical division for over four years. How has evolved Brazil's healthcare ecosystem during your absence?

An aspect that is worth mentioning is the incredible growth of the Brazilian pharmaceutical market, as the latter has remarkably weathered the political and economic turmoil that has hit our country over the past four years. Having been out of the market for over a decade, I noticed when coming back to Brazil in October 2015 that almost all market's metrics and figures have either increased or improved over the past decade, while all channels across the value chain experienced an eye catching consolidation and expansion.

Although I joined the Brazilian affiliate at the height of the recent crisis, I could feel that Brazil's decade of continuous and strong economic growth has had a very positive impact on our healthcare sector as a whole, and most of our country's achievements were not compromised by the two years of recession that we just experienced [*while the Brazilian GDP contracted by 3.8*

percent in 2015 and by 3.6 percent in 2016, the OECD recently forecasted 0.7 percent and 1.6 percent grow rates for 2017 and 2018 – Ed.].

2015 indeed emerged as a challenging year to take over the reins of a Brazilian affiliate, after decades of sustained growth for the country's economy and healthcare market.

Which rationales motivated you to come back to your home country?

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Having spent eleven years abroad, I felt that it was time for my family to come back to our country, while my children have spent most of their lives outside of Brazil.

From a professional standpoint, Alcon moreover stands as a company that I have always admired since my beginnings in the industry – 24 years ago. As a matter of fact, when I joined Novartis Group it was in the ophthalmology field and heading Alcon's Brazilian affiliate therefore allowed me to reconnect to a field that I have always been passionate with. Furthermore, taking over the reins of the Brazilian affiliate was a true honor for me, as Alcon is the Brazil' leader in eye care and the country proudly emerges as a Top Ten market within the group's global operations.

Finally, it was a perfect opportunity to bring to the Brazilian organization the international expertise that I have polished over these eleven years abroad, while moving from the pharmaceutical to the medtech side also appeared to me as a very exciting challenge!

Globally, Alcon's sales have been recovering and actually increased seven percent during the third quarter of 2017. However, the Brazilian organization has been growing at a double-digit rate over the last year. What have been the main drivers of this impressive growth?

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We are very proud of these great results, which truly come as a combination of several factors: first and foremost, the great talent we hold within our affiliate, second, the outstanding quality and innovation of Alcon's product portfolio, and – finally – the tireless commitment of our teams to strengthen our relationships with our partners and customers.

Regarding this last point, we have truly put the emphasis over the past two years on exceeding the expectations of our customers – whether from scientific, technical, or patient-centric standpoints – and this strategy is now paying off. One aspect of this approach notably implied significantly enriching our solutions and services offering in order to accelerate the market uptake of our latest

products, taking into account the fact that our customers would more rapidly integrate our products if we are able to build a closer relationship with them.

We are evermore proud of these results because 2016 was a particularly difficult year for our country's economy, but – thanks to the commitment of our employee and a great execution of our strategy – we have managed to offset this negative external context. Overall, one should not think that Brazil's medical devices sector and Alcon were totally spared by the recent crisis, but our affiliate was able – during very challenging times – to put in place fundamentals that have been driving the growth of the affiliate over the past year.

What have been some of these initiatives that are now driving the growth of the affiliate?

In 2016, at the height of the economic crisis, Alcon conducted significant countercyclical investments. We notably set up a new, completely automated distribution center in Goiás [*in the center of Brazil – Ed*] that today helps us better support the rapidly growing markets of the North and Northeast of the country. This distribution center dedicated to our surgical area will moreover ideally position us for the next ten years and allow us to further sharpen Alcon's competitive advantage in terms of logistics and product delivery.

Furthermore, we launched in 2016 an e-commerce platform "My Alcon" that enables online orders for our surgical products, rendering purchasing and follow up much easier and faster for our customers. From "My Alcon", customers can order our Surgical products (except equipment), monitor the inventory of intraocular lenses, consult their invoices, contact the Customer Service Center, as well as access the complete digital product catalog and an area with information of interest for patients. Finally, this digital tool enables to significantly shorten delivery timelines (by at least one day) and reduce the risk of human error. Finally, My Alcon has become a new channel of engagement between our customers and our company, which perfectly complements our existing relationship with our field force.

The Brazilian market has rapidly adopted this new platform, and it now makes up over 25 percent of all surgical sales – a year only after it was launched. The Brazilian affiliate of Alcon was the first in the world to launch this innovative tool, and no similar platforms existed in Brazil prior to the launch of "My Alcon". The latter is now being implemented in the US market and we are particularly proud to see that Brazil served as the world's pilot for this great innovation, which truly showcases how healthcare companies are embarking on a highly needed digital revolution.

As a matter of fact, I believe that Brazil was the perfect market to experiment this platform, as we hold a significant market size and – as the world’s fifth largest market – the country also displays logistics challenges that render the use of an e-commerce platform extremely convenient. In the meantime, these investments in Brazil truly reflect Novartis’ and Alcon’s longstanding commitment to the country, while showcasing that the Novartis group does not base its development strategy in Brazil on the short-term fluctuations of our economy.

From a personal standpoint, I believe that difficult times should always be seen as windows of opportunities to exit the crisis stronger than ever thanks to bold investments – and it is exactly what has been happening to Alcon in Brazil. Finally, of course, the several products and innovations we brought to the market on the last 24 months such as AcrySof® IQ PanOptix® and AcrySof® IQ PanOptix® Toric intraocular lenses (IOL) and NGENUITY® 3D Visualization System.

Leveraging on your longstanding experience honed among pharmaceutical companies and particularly Novartis Pharma division, which specific capabilities of Alcon have you aimed at strengthening since your appointment?

Fundamentally, my objective is to integrate and combine the best of both the pharmaceutical and medtech worlds, as long as this integration is relevant in the Brazilian context.

In the pharmaceutical industry, market access has become a crucial area for several decades already, and the continuous development and refinement of these capacities are truly at the core of all affiliates’ growth strategies. However, the medtech industry still lags behind the pharmaceutical industry in this regard, and one of my priorities was therefore to create dedicated market access capabilities covering both the public and private market. To be successful in this endeavor, our first and foremost priority has been to better understand our customers’ needs and work hand-in-hand with them to identify innovation bottlenecks. Nevertheless, I believe that a successful market access approach should not be exclusively outward looking, and we also put great efforts on assessing our own product and service portfolio, to ensure we are able to offer the products or solutions that would perfectly match the customers needs identified.

Another area that I have striven to further developing since my appointment is medical affairs. This aspect is evermore relevant for Alcon as we are constantly bringing new innovations to the market and we need to ensure surgeons and physicians receive an optimal level of support and guidance.

In the meantime, I deeply believe that there are plenty of positive dynamics driving the medtech industry, which could also inspire pharmaceutical businesses. For example, medtech companies are much more agile than their counterparts operating in the pharmaceutical field, as innovation

cycles are significantly shorter in the medtech industry. This specificity also implies that customer focus is remarkably high among medtech companies, and the latter operate more closely to their final users than in the pharmaceutical area. Finally, I would highlight that medtech companies' customer-centered commitment is particularly broad, as it encompasses both sales and after sales services.

As Alcon already stands as Brazil's leader in eyecare, how do you want to further develop the company's leadership in the country?

Innovation will play a central role in strengthening and broadening our leadership in Brazil. First and foremost, we aim at consolidating the success of recently launched products. For example, we released less than a year ago AcrySof® IQ PanOptix®, a presbyopicorrecting intraocular lens (IOL) and more recently we brought AcrySof® IQ PanOptix® Toric, for patients with pre-existing corneal astigmatism undergoing cataract surgery. It is a new option for astigmatic patients who seek to address their near, intermediate and distance vision needs with a single lens. Within few months on the market, this product has already become market leader.

In the meantime, we want to go beyond our current strengths in cataract and refractive surgery to strengthen our position in retinal and glaucoma surgery devices. As a result, in the upcoming years, Alcon Brazil will not be exclusively focus on gaining market shares in its strongest niches, and our priority is more to take advantage of our innovative portfolio to provide surgeons and patients with a broader set of solutions and diversify our scope of action.

In this endeavor, we are lucky to rely on Alcon's groundbreaking innovative R&D pipeline and product portfolio. For example, we just launched in Brazil NGENUITY® 3D Visualization System, a platform for Digitally Assisted Vitreoretinal Surgery (DAVS). The latter is designed to enhance visualization of the back of the eye and allows retinal surgeons to operate looking at a high definition 3D screen, instead of bending their necks to look through the eye-piece of a microscope. While this system makes it easier for surgeons to perform these long, delicate surgeries, it is also designed to facilitate collaboration and teaching in the operating room by offering an immersive panoramic surgical view that allows the operating team to observe exactly what the surgeon is seeing in real-time.

In the glaucoma area, we are awaiting the approval in Brazil of CyPass® Micro-Stent, a micro invasive glaucoma surgical (MIGS) device, indicated for the treatment of patients with mild to moderate primary open-angle glaucoma in conjunction with cataract surgery. This ground breaking micro stent is the first MIGS device to leverage an entirely new outflow pathway for excess aqueous fluid in the eye - the supraciliary space, which is the space between the sclera, the white

outer layer of the eyeball, and the ciliary body. Once implanted, it creates a permanent conduit between the anterior chamber of the eye and the suprachoroidal space to improve the eye's natural drainage pathway.

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