

Colombia IVD Commercial Intelligence Brief

90-day account, channel and risk diligence sample

Persona: Country Manager / Commercial Director - IVD manufacturer or distributor
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Executive snapshot

Decision question: Where should the commercial team focus account, channel and risk diligence in Colombia over the next 90 days?

#	Signal	Commercial meaning	90-day move
1	HUEM: 10 observed 2026 diagnostic relationships; BD amount conflict quarantined	Multi-vendor functional architecture	Map platforms, ownership/support model and renewals
2	COMPROLAB: COP 2.4bn Cartagena supply contract + Arauca equipment-support award	Supply + technology-support/channel evidence	Map manufacturer ties and reagent pull-through
3	Fleming: five 2026 lab-reagent contracts across two Huila buyers	Recurring buyer-level incumbent signal	Track continuation and platform families
4	Subred: 11 observed diagnostic relationships, many legacy/amended	Renewal timing matters more than headline aggregate	Reverify expiries and lot allocation
5	Maicao: COP 2.4bn specification names VIDAS and Elecsys/cobas e families	Demand/spec signal - not award evidence	Locate award and compare requested vs final stack
6	PIGF/KRYPTOR: June follow-up isolates cause to three compact REACT plate lots	Service + stock-traceability signal	Map site/plate-lot exposure and corrective action

Evidence discipline: No market-share inference. No mixed-vintage spend aggregation. Tender specification is not award. Registration is not commercial presence. Conflicted primary amounts are quarantined.

Account architecture and channel footprint

F01 HUEM multi-supplier diagnostic architecture A	
WHAT HAPPENED	HUEM's CP3-approved buyer graph records ten primary-verified 2026 diagnostic procurement relationships across blood bank, microbiology and outsourced diagnostics. Contract 142-2026 with Becton Dickinson explicitly covers liquid culture/susceptibility for Mycobacterium tuberculosis and names BACTEC MGIT 320 in a comodato context. The same signed PDF contains an amount conflict (cover COP 99,643,517 vs Clause 4 COP 102,227,519), so no definitive Contract 142 value is used here. Abbott Contract 327-2026 separately supports blood-bank immunoserology with technology support for COP 139,055,100.
SO WHAT	Different diagnostic functions are supplied by multiple vendors and several relationships use technology-support/comodato structures. This makes category-by-category competitive mapping more useful than treating HUEM as a single-vendor laboratory.
NOW WHAT	Map the exact current analyzer/platform for each blood-bank and microbiology slice; reverify contract/renewal status; identify categories open to displacement, expansion or service-led defense.
EVIDENCE BOUNDARY	Ten observed relationships are not total annual HUEM diagnostic spend. The Contract 142 amount is QUARANTINED until authoritative resolution. BACTEC MGIT 320 relationship is directly supported; exclusivity and complete installed base are not.

Evidence: HUEM signed Contract 142-2026; Abbott Contract 327-2026; CP3 DR-PRC-020..023 and DR-PRC-026..031 lineage.

F02 COMPROLAB spans supply and equipment-support models A	
WHAT HAPPENED	Cartagena Contract 060-2026 has a definitive COP 2.4bn value for laboratory/cytology supplies, rapid tests and quality-control inputs, together with broad biomedical-equipment comodato. Separately, Hospital San Vicente de Arauca awarded COMPROLAB an equipment-comodato/support arrangement covering hematology, clinical chemistry, electrolytes, blood gases, special tests, urinalysis, neonatal TSH and coagulation. The Arauca document states an equipment-equivalent value of COP 2.141946926bn and explicitly says the process does not affect the entity's budget.
SO WHAT	COMPROLAB has evidence-backed capacity to operate as both a large laboratory-supply contractor and a technology-support/comodato partner. That makes manufacturer/channel diligence commercially relevant.
NOW WHAT	Map COMPROLAB's manufacturer relationships, exact analyzer brands/models, additional 2026 accounts and reagent pull-through associated with its equipment-support model.
EVIDENCE BOUNDARY	Do not add the Arauca equipment-equivalent value to procurement spend or supplier revenue. Arauca proves multiple diagnostic categories, not exact platform brands/models.

Evidence: Cartagena ESE Q1-2026 SECOP audit; Hospital San Vicente de Arauca Resolution 2-0060/2026.

Recurring demand and renewal intelligence

F03	Fleming shows recurring 2026 Huila laboratory demand	A
WHAT HAPPENED	Hospital San Antonio de Padua - La Plata recorded three separate Fleming laboratory-reagent supplies in 2026: COP 200m in January, COP 200m in February and COP 500m in March. Garzon separately recorded Fleming laboratory contracts of COP 300m and COP 80m in February; Contract 143 explicitly links reagent supply to equipment held under comodato 018-2026.	
SO WHAT	Repeated short-duration contracting across two Huila buyers is a strong account-level recurrence/incumbency signal. It does not establish exclusivity, annualized spend or national share.	
NOW WHAT	Monitor subsequent La Plata monthly contracting; verify whether the Garzon/Fleming relationship renewed after recorded end dates; resolve exact analyzer/manufacture families behind the reagent pull-through.	
EVIDENCE BOUNDARY	These are observed 2026 contract values at two buyers. They are not market share, do not prove exclusivity and do not establish a complete installed-base map.	

Evidence: La Plata official Jan/Feb/Mar 2026 contract relations; Garzon official February 2026 contract register.

F04	Subred: renewal intelligence is more useful than headline spend	A
WHAT HAPPENED	The official February-2026 contractual report supports eleven CP3-observed diagnostic relationships across rapid tests, laboratory reagents, external quality control, POCT/glucometry, pretransfusion and outsourced testing. Several relationships originated in 2022-2025 and remained represented in the February 2026 snapshot through extensions/additions. The rapid-test parent process OC-395-2025 is split across at least Aldir, Discolmets and Quinberlab.	
SO WHAT	The account has an amendment-heavy, multi-supplier procurement architecture. Commercial value lies in identifying renewal/re-procurement windows and category-specific incumbents rather than summing heterogeneous snapshot values.	
NOW WHAT	Reverify which legacy contracts remain active now; track the next cross-Subred laboratory process; map lot-level supplier allocation and any platform dependencies.	
EVIDENCE BOUNDARY	Status is verified only as of the February-2026 report. Mixed-vintage and mixed-amount-basis values must not be aggregated into '2026 spend' or market share.	

Evidence: Subred Sur Occidente official Informe Contractual febrero de 2026; CP3 lifecycle-normalized procurement mapping.

Demand specification and regulatory/service risk

F05	Maicao specifies VIDAS and Elecsys/cobas e assay families	B
WHAT HAPPENED	Hospital San Jose de Maicao Convocatoria Privada 004-2026 sets an estimated COP 2.4bn budget for laboratory technologies, supplies and reagents. Its technical specification explicitly names multiple VIDAS assay families and numerous Elecsys/cobas e assay families, alongside broad chemistry, immunology, hematology, coagulation, urinalysis and critical-care technology requirements.	
SO WHAT	This is strong demand/specification evidence showing what the buyer requested and which compatibility/product families were written into the procurement document. It can flag a competitive platform opportunity or workflow clue, but not the eventual winning stack.	
NOW WHAT	Locate the award/signed contract; compare final supplier/platform choices with the specification; identify retained, displaced and newly introduced technologies.	
EVIDENCE BOUNDARY	DEMAND / PROCUREMENT SPECIFICATION OBSERVED only. Named VIDAS and Elecsys/cobas e products are not treated as awarded, installed, imported or commercially active at Maicao.	

Evidence: Hospital San Jose de Maicao Convocatoria Privada 004-2026.

F06	Updated PIGF/KRYPTOR field action shifts diligence to reaction plates	A
WHAT HAPPENED	INVIMA Informe de Seguridad 66-2026 and the initial manufacturer FSCA 01-26 flagged QC1 underestimation when PIGF Plus KRYPTOR was run on KRYPTOR compact PLUS. A manufacturer follow-up dated 4 Jun 2026 states the underestimation is not caused by the PIGF reagent lots themselves. The identified root cause is specific KRYPTOR compact REACT reaction-plate lots 40102+R78, 40102+R79 and 40102+R80. The follow-up instructs users to stop/discard affected reaction plates and states that all available PIGF Plus KRYPTOR reagent lots may continue to be used.	
SO WHAT	This is a workflow/consumable-specific field-action and service/stock-traceability signal at KRYPTOR compact PLUS sites, not a universal PIGF reagent-lot failure.	
NOW WHAT	Identify Colombian KRYPTOR compact PLUS sites; determine whether affected reaction-plate lots were stocked or used; verify replacement/disposal and customer communication; where relevant, confirm whether prior results required review under the initial notice.	
EVIDENCE BOUNDARY	The issue is analyzer/workflow specific. Reviewed sources do not quantify Colombian installed base, affected stock in Colombia, number of impacted sites, patient harm in Colombia or commercial impact. The June follow-up supersedes the initial reagent-lot attribution.	

Evidence: INVIMA Informe 66-2026; B-R-A-H-M-S FSCA 01-26 (31 Mar 2026); manufacturer follow-up (4 Jun 2026).

What the commercial team should do next

1. HUEM account map	Build a category-by-category map for TB microbiology, blood bank, QC and outsourced testing. Resolve Contract 142 value separately; do not use a HUEM monetary aggregate until fixed.
2. COMPROLAB channel diligence	Map manufacturer relationships, equipment placed under support/comodato, corresponding reagent pull-through and additional 2026 public accounts.
3. Fleming Huila watch	Track La Plata monthly renewals and Garzon follow-on contracts. Identify whether recurrent procurement is tied to specific analyzer families.
4. Subred renewal calendar	Convert the February snapshot into a contract-by-contract renewal calendar. Treat additions/extensions as lifecycle events, not new market-size observations.
5. Maicao award watch	Find the award/signed contract and compare requested VIDAS/Elecsys families with the eventual supplier and technology stack.
6. KRYPTOR compact PLUS service trace	Identify Colombian sites and affected compact REACT plate-lot exposure; verify corrective action completion where evidence is obtainable.

How to use this brief

- Prioritize diligence, not unsupported certainty. Each action is a next research/commercial step, not a guaranteed purchase prediction.
- Use the common Colombia intelligence base once; personalize relevance by account. Do not build a separate factual truth for every prospect.
- Material cited sources are retained with Source_ID, provenance metadata and SHA-256 where obtainable.

What this sample is - and is not

Evidence base	Primary Colombian procurement/institutional records, INVIMA regulatory evidence and manufacturer field-safety notices. CP3 structured lineage is an internal index, not a substitute for underlying primary evidence.
Verification & confidence	The six findings passed a seven-pass review after correction. Grade A indicates direct primary support; Grade B indicates strong demand/specification evidence that still requires award verification.
Fact vs inference	Every finding separates What Happened (fact), So What (analysis), Now What (action hypothesis) and Evidence Boundary.
Procurement	Process, specification, award, signed contract, addition, execution snapshot and non-spend equipment reference values remain distinct evidence classes.
Regulatory	Registration/safety action does not automatically prove sales, installed base, exclusivity, affected Colombian inventory or commercial impact.
Representativeness	This is decision-support built from observed public evidence. It is not a national market census, market-share model or exhaustive supplier ranking.
Currentness	Contract/regulatory status is scoped to the date of the cited source unless explicitly reverified later.

Publication status

Method verification: PASS AFTER CORRECTIONS. The six findings and their evidence boundaries were reviewed on 16 Aug 2026. Public release authorized by the project owner.

Evidence condition: Material sources are retained in controlled evidence storage. Every conclusion remains limited to the cited source and date.

Primary sources used in this public sample

Source group	Primary evidence
HUEM	Contract 142-2026 (BD), Contract 327-2026 (Abbott), plus CP3 lineage for Contracts 090/091/092/095/099/272/278/279.
Cartagena	ESE Hospital Local Cartagena de Indias - SECOP II Primer Trimestre 2026 audit.
Arauca	Hospital San Vicente de Arauca - Resolucion 2-0060 de 2026 / Menor Cuantia 002-2026.
La Plata	Official January, February and March 2026 contract relations.
Garzon	Official February 2026 contract register.
Subred	Subred Sur Occidente - Informe Contractual febrero de 2026 (official XLSX).
Maicao	Hospital San Jose de Maicao - Convocatoria Privada 004-2026.
PIGF / INVIMA	INVIMA Informe de Seguridad 66-2026.
PIGF / manufacturer	B-R-A-H-M-S FSCA 01-26 initial notice dated 31 Mar 2026.
PIGF / follow-up	B-R-A-H-M-S FSCA 01-26 follow-up dated 4 Jun 2026.

Use and limitations

Publication state: Public sample v1.2. This document demonstrates the method and is not a client engagement deliverable.

Evidence scope: The index lists the principal official and manufacturer sources behind the six findings; it is not a complete market census.