



# Discover Global Markets

HealthCare and Life Sciences

Minnesota | Nov 17, 2014 | BRAZIL



# U.S. Commercial Service Locations

- Embassy in Brasília
- São Paulo
- Rio de Janeiro
- Belo Horizonte
- Recife
- Porto Alegre (to be implemented)

## Why Brazil?

- 200 million consumers with increased purchasing power
- Represents half of the economy of Latin America
- GDP of over \$2.25 trillion in 2012 > U.K., Russia or India
- Per capita income 45% higher than China
- Agricultural superpower

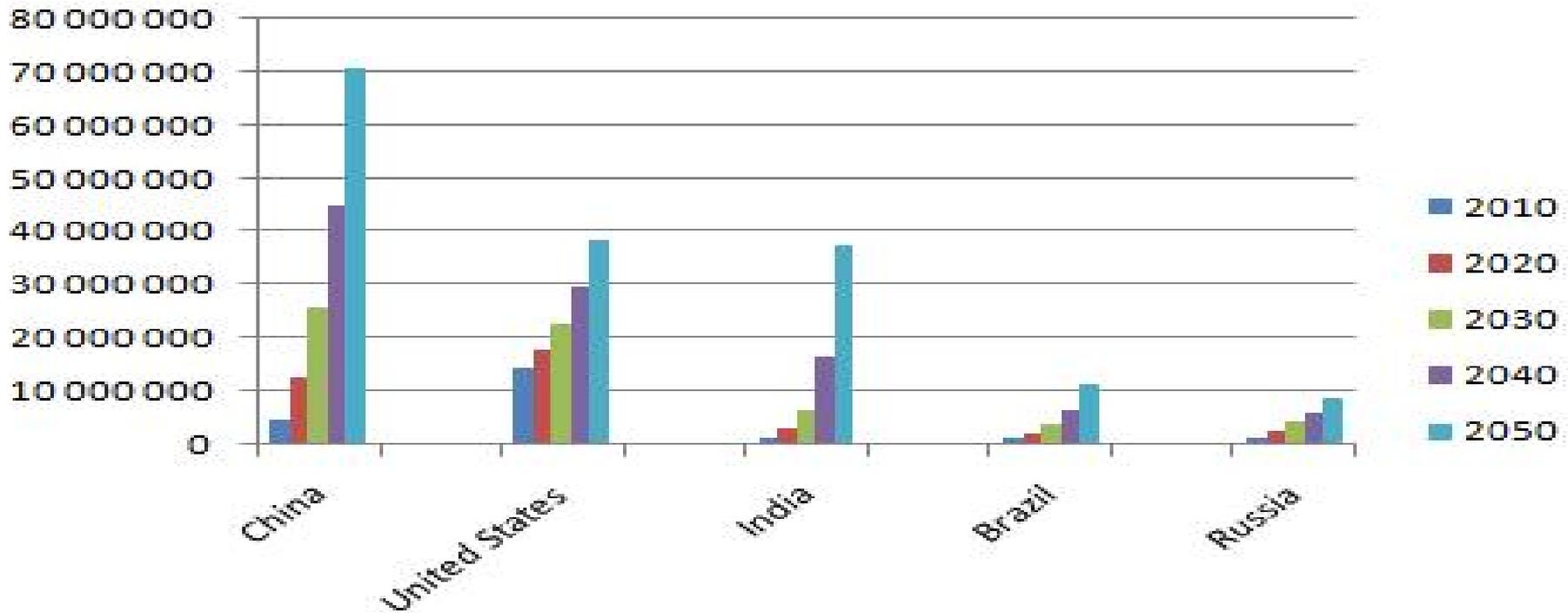


# Why Brazil?



- Massive pre-salt offshore oil and gas deposits
- FDI in Brazil expected in US\$ 64 billion – 5<sup>th</sup> largest in the world
- Two-way goods trade between the US and Brazil topped \$75.8 billion in 2012. For services, US\$28.7 billion in 2011. For royalties, US\$4.8 billion in 2011.
- US exports to Brazil totalled \$42.9 billion.

Forecasts vary, but the IMF has predicted that Brazil will be the 5th largest economy by 2015 (overtaking France).



The five largest economies in the world in 2050, measured in GDP nominal (millions of USD), according to [Goldman Sachs](#).<sup>[18]</sup>



## Healthy economy: Macroeconomic Analysis

- Strong economy
- Achieved investment grade status
- Low unemployment
- Appreciating currency
- Inflationary pressures still low

# BRAZIL VS USA



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# MAJOR CITIES



# Brazil Medical Devices Market

- Brazil is the largest market for medical equipment in Latin America.
- Total market for medical equipment in Brazil should continue to expand approximately 15% through 2014.
- Brazil is both a major medical equipment producer and importer.

# Brazil HealthCare System

- SUS – Public system, full coverage for all citizens
- Private Insurance: around 40% of population
- 6,800 hospitals, 70% are private
- Investments – 55 % private, 45 % public
- Around 8,6% of GDP

# Brazil Medical Devices Market

- Market Size: US\$7.5 billion
- Brazilian medical products revenues has shown 15%-20% increase per year.
- The United States accounts for approximately 30% of the import market, with U.S. sales mainly going through local agents, distributors and importers who sell to hospitals and clinics.
- The United States is the main supplier for Brazil and also the country that most import Brazilian medical products.

# Highest Demand

- Innovation
- Less expensive solutions
- High quality
- Competitive prices

# Best Prospects

- Home Care products
- Disposables
- High Tech equipment
- Orthopedics / Implants / Cardio/ In Vitro

# Challenges to Opportunities

- Regulatory requirements – ANVISA + FDA
- Export x Local Production – Public Bids and Mercosul
- PDP – Partnership to supply the government
- Reduce Trade Balance for healthcare products

# Drugs and Pharmaceuticals

- Market size: US\$27,000 billion
- Strong presence of multinationals and generics
- High dependence on imported raw ingredients
- Public programs for prevention of diabetes, cholesterol, high pressure, HIV, cancer
- Nutritional Supplements – in expansion. Easy registration as food as long there is no therapeutic effect.

# Veterinary

- Pet market: 100 million (35% dogs, 25% fishes, 20% cats, 19% birds, 1% others).
- 2<sup>nd</sup> largest market in world, growth 18%. Revenues US\$6 billion

# Cosmetics and Toiletries

- Plastic Surgery: 2<sup>nd</sup> largest market
- Cosmetics: US\$ 49 billion, 2<sup>nd</sup> largest market
- Innovation, fashion, brands

# Clinical and Laboratory

- Investments from Government
- Exemption of duties
- No registration process
- Biotech, pharmaceutical, high technology
- Laboratory, reagents

# Opportunities in Trade Shows

Major Trade Shows in Latin America are held in Brazil

- Jornada Paulista de Radiologia – [www.spr.org.br/jpr](http://www.spr.org.br/jpr)
- Hospitalar - [www.hospitalar.com](http://www.hospitalar.com)
- Reabilitação – [www.reabilitacao.com](http://www.reabilitacao.com)
- Sao Paulo Intl Dental Show – [www.ciosp.com.br](http://www.ciosp.com.br)
- Hair Brazil – [www.hairbrasil.com](http://www.hairbrasil.com)
- Naturaltech – [www.naturaltech.com.br](http://www.naturaltech.com.br)
- Pet South America - [www.petsa.com.br](http://www.petsa.com.br)
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