



BRAZIL

Capital: BRASILIA

Population: 210 million

Potential business figures on healthcare in 5 years: Brazil is one of the most attractive and promising healthcare markets globally, ranking 8th in the world and estimated to grow to \$232B by 2021. B. has the 3rd largest private health sector globally, and 2nd largest private health insurance market. According to Business Monitor International, from 2016 to 2025 - 21% growth (in real terms) is expected, which would make Brazil the 5th largest Health market worldwide.

Typical buyer of health services: Public healthcare spending totals 48% of total spending and serves 75% of the population. Private institution attend apr 25 % of population and account for 52 % total healthcare spending. Brazil has a large range of healthcare providers, from excellence centers catering to the wealthier population and many times also serving the very poor through government partnerships, to very low resource institutions.

Governmental or legislative climate to support new services/innovations on health: Providers are very open to learn about new solutions and to pilot new products/services if they meet their needs. They are very interested to learn about global solutions as well, so long as international companies are willing to modify products/services to the local market needs and conditions and to consider after sales support requirements.

Business Finland and national development bank of Brazil BNDES have agreed on RDI financing possibility for joint RDI projects between Finnish tech company and Brazilian health provider or company.

Typical buying and/or acceptance process in the country for new solutions:

The approval system for medical devices in Brazil by ANVISA is complex. The complexity, costs, and timeline associated with registration depends on the classification of the device, the approval time can vary from 1 month up to 4 years. The market entry plan of new technologies should carefully consider the approvals, where experienced local help using available official fast track can be used to reduce the approval time by 70 % and the related cost.

Finnish health established business in country: None, but promising by Finnish companies. 3 Finnish companies are starting pilots in 2018.

Opportunities for Finland: Patient engagement, Operational efficiency, Patient monitoring, Artificial intelligence, clinical data analytics, payment processing, point of care analytics.

Regulation & Reimbursement environment: (a) All citizens officially constitutional right to healthcare; (b) Public healthcare serves 75% of the population & Out of pocket comprises 25% healthcare expenditure; As part of the registration process, some medical devices require additional certifications in Brazil ie. electrical safety certifications, wireless clearance or good manufacturing practices.

Trends & Strategy: (a) Increase in chronic diseases & re-emergence of infectious diseases, (b) Many Healthcare Providers setting up in-house Innovation incubators, increasingly interested in working with start-ups (c) Strong interest by many Providers in Machine Learning/Artificial Intelligence (d) Patients increasingly seen as Consumers —Providers looking for engaging ways to communicate with patients to offer services, continuous care & better patient experience (e) Innovative Payment Models

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BUSINESS FINLAND

Health & Wellbeing

QUICK FACTS ✓

Life expectancy: 74 yrs

GDP (PPP): 1,246 Trillion \$ (20th), Per Capita 50.300\$ (29th)

Growth Rate: 2,3%

Official Languages Portuguese, (English about 50%)

Physicians density: 1,85/ 1000 pop.

Birth Rate: 14,1 / 1.000 population

Digitalization Maturity^(✓): 46th

DEI Index 2,24 / Break Out

Health expenditure: 10,3% (GDP)

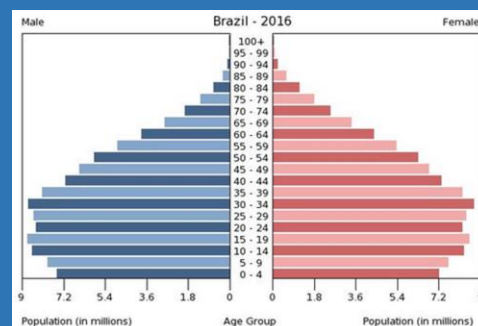
Urbanization rate: 86,6%

Hospital bed density: 2,2 /1000

Obesity rate: 2,1%

Median Age: 32 years

Population growth rate: 0,73% ✓



Deaths per 100.000 people	Finland	Brazil
HIV/AIDS	0,1	7,5
Respiratory infections	8,5	31,9
Perinatal conditions	1,5	18,2
Diabetes mellitus	10,0	32,3
Hypertensive heart disease	13,9	27,9
COPD	19,7	22,6
Genitourinary diseases	7,2	13,0

National challenges ✓: Ischaemic heart diseases, Cerebrovascular disease, Alzheimer disease

Link to opportunities ✓ :

<https://bit.ly/2EG6uBT>

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