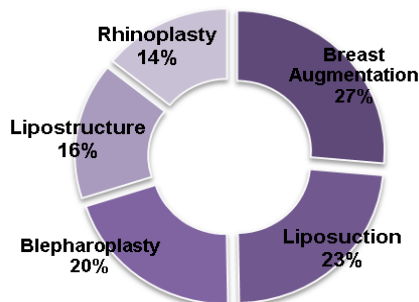


Brazil now World #1 in Plastic Surgery

Higher purchasing power of the fast-growing middle class helps explain Brazil's 1.49M esthetic surgeries in 2013, surpassing the USA's 1.45M. 5,473 surgeons and esthetic specialists are counted by Dr. Carlos Uebel, president of ISAPS (Esthetic Surgery Society)

Main Cosmetic Surgical Procedures in 2013



Source: ISAPS

Economy Hesitant but Health Sector Thrives

Large drug chains invoiced R\$32.4 billion (~\$13B) in 2014, according to research by FIA-USP (University of São Paulo).

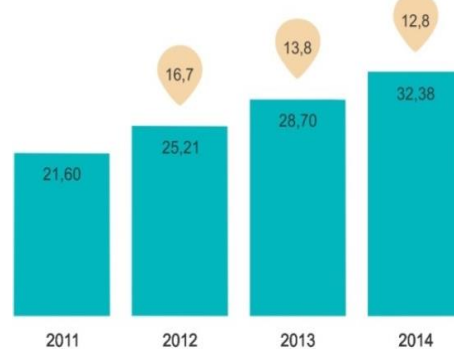
Chains ended the year with 5,570 stores, adding 10% in 2014.

Generic drug sales increased 6.4%.

Source: *Folha de São Paulo*

Drug Chain Revenue

R\$B and YOY change



Major Upcoming Events

More than 7 million tickets went on sale for 2016 Olympic Games. Rio de Janeiro expects 380,000 tourists during 15 days of competition.

Brazil received 700,000 foreign visitors for the 2014 World Cup played in stadiums of 12 major cities, and won high satisfaction ratings.

Other interesting events in 2015

- Agrobusiness Fair: April – Ribeirão Preto, SP
- Tomorrowland: May – Itu, SP
- FLIP Paraty (RJ) International Literary Fair: July
- Rock in Rio: September – Rio de Janeiro, RJ
- Motor Show: October - São Paulo, SP

Brazilians Becoming Intercity Commuters

7.4M travel inter-city daily to work or study, creating new challenges for mass transport. Greater São Paulo alone has 1.8M commuters.

Passengers to São Paulo will benefit from a train being built to connect with the city of Guarulhos' huge airport (GRU), largest in Latin America. Daily flux between these cities nears 150,000.

Updated Profile of Health Care in Brazil

30 MAIN MEDICAL SPECIALTIES, 2014

Rank	MD specialty	Total	%
1	General Medicine	198,704	40,6
2	Pediatrics	36,155	7,4
3	Obstetrics / Gynecology	28,958	5,9
4	Cardiology	20,474	4,2
5	Orthopedics	15,759	3,2
6	Ophthalmology	13,309	2,7
7	Dermatology	11,028	2,3
8	Psychiatry	10,607	2,2
9	Anesthesiology	8,761	1,8
10	Gastroenterology	7,971	1,6
11	Endocrinology	7,452	1,5
12	Neurology	7,195	1,5
13	Otolaryngology	6,933	1,4
14	General Surgery	5,736	1,2
15	Intensive Medicine	5,239	1,1

16	Urology	5,238	1,1
17	Nephrology	4,587	0,9
18	Pulmonology	4,088	0,8
19	Geriatric	4,034	0,8
20	Oncology	3,434	0,7
21	Angiology	3,408	0,7
22	Rheumatology	2,605	0,5
23	Infectology	2,590	0,5
24	Hematology	1,976	0,4
25	Allergy	1,925	0,4
26	Plastic surgery	1,845	0,4
27	Vascular surgery	1,525	0,3
28	Proctology	1,436	0,3
29	Radiology	1,242	0,3
30	Neonatology	848	0,2
TOTAL (One MD can have multiple specialties)		489,471	86,8

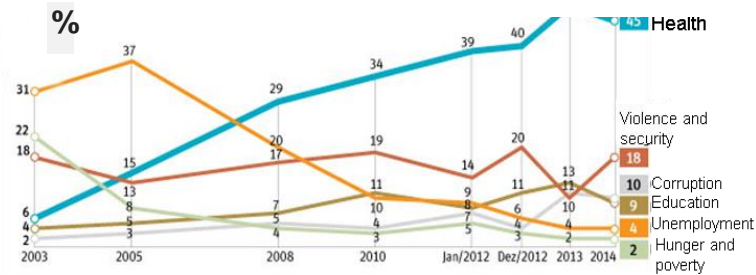
PHYSICIANS X POPULATION, 1940-2014

Period	MDs	Population	Pop./ MD
1940	20,745	41,236,315	1988
1960	34,792	70,992,343	2040
1980	137,347	121,150,573	882
2000	291,926	169,590,693	581
2010	364,757	190,755,799	523
2014	393,696	203,913,939	518

Specialists & Generalists by Region, 2014			
Region	Specialists	Generalists	Total
Central West	19,376	15,390	34,766
South	40,000	37,229	77,229
Southeast	151,939	130,303	282,242
Northeast	41,273	37,218	78,491
North	8,397	8,346	16,743
BRAZIL	260,985	228,486	489,471

What worries Brazilians most? 2003-2014

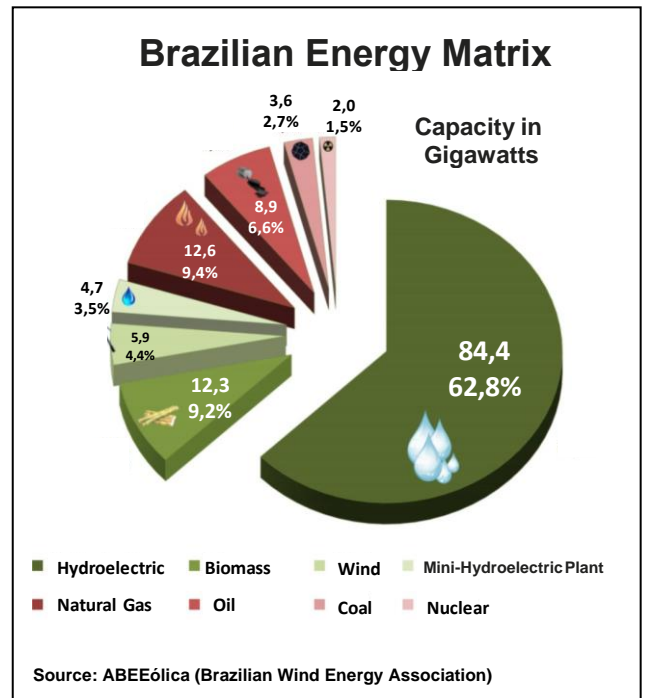
Since 2008, **HEALTH CARE** tops all concerns



Renewable energy: Brazil's long-term advantage, short-term challenge

Blessed with vast water sources, Brazil relies on hydraulic plants for **63%** of its energy. Now an historic drought pushes the country to invest more in other *green* sources, also enviably abundant.

Brazil ended 2014 with 6GW of installed WIND capacity, enough for a city of 10M and 4.5% of overall electrical capacity. In 2014 the country invested \$16B in eolic energy. Source: O ESTADO DE SÃO PAULO



WHO FEEDS THE WORLD?

EXPORTS MTons of CORN STOCKS

Country	2014/15	Variation
USA	45.7	-6.1%
Brazil	20.5	-2.4%
Ukraine	18.8	-10.0%
Argentina	14.5	-14.7%
Others	15.6	-26.6%
World	116.8	-10.4%

Country	2014/15	Variation
China	79.2	2.5%
USA	45.1	44.3%
Brazil	17.8	-6.3%
U.E.28	7.6	18.1%
Others	32.5	-7.6%
World	185.3	7.6%

EXPORTS MTons of SOY STOCKS

Country	2014/15	Variation
USA	48.7	8.70%
Brazil	46	-1.80%
Argentina	8	2.00%
Paraguay	4.8	0.00%
Others	6.2	17.50%
World	117.4	3.90%

Country	2014/15	Variation
USA	34.7	19.70%
Brazil	24.6	48.70%
Argentina	14.3	-0.70%
Paraguay	10.5	318.70%
Others	4.2	29.50%
World	89.5	35.50%

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- Hand-picked **bilingual moderators** and **UN-level translators**

Abaco's Unique Toolbox for Health Care Research

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- Interviewing **facility** ideally located near Brazil's largest concentration of major **hospitals and clinics**
- MD **communities**, various specialties
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