Portugal Pharmaceuticals and Healthcare Report Q1 2015

Description: BMI View: The Portuguese government measures to reduce public spending on medicines will continue to weigh on the pharmaceutical sector over a multi-quarter horizon, as illustrated by a new cost-containment agreement between the Ministry of Health and the pharmaceutical industry. Among the agreed items, the government commits to ensure the partial liquidation of payment arrears by public healthcare providers to pharmaceutical suppliers over the next quarters, while the industry sector accepts to contribute to a reduction in public expenditure on medicines in 2015, through a contribution of around EUR180mn.

Meanwhile, a tax on medicine sales will become effective in 2015 according to the recently approved state budget for health, although this tax will not be applicable to pharmaceutical companies that adhere to the new agreement with the Health Ministry.

Headline Expenditure Projections

- Pharmaceuticals: EUR3.42bn (USD4.52bn) in 2013 to EUR3.25bn (USD4.35bn) in 2014; -5.1% in local currency and -3.7% in US dollar terms. Forecast revised slightly downwards from Q414 due to revision to historic data.

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