Spain Pharmaceuticals and Healthcare Report Q3 2015

Description: Spain's non-transparent and unpredictable government medicine pricing system and the implementation of numerous emergency measures to contain pharmaceutical spending will highly disrupt multinational drugmakers' strategy and revenue streams. Despite the Spanish economy exiting crisis mode, we believe that the Spanish government will continue to target the healthcare sector - a large recipient of government funds. As a result, we uphold our bearish outlook for the Spanish pharmaceutical market over the next five years.

Headline Expenditure Projections
- Pharmaceuticals: EUR23.02bn (USD30.85bn) in 2014 to EUR22.36bn (USD24.60bn) in 2015; -2.9% in local currency terms and -20.3% in US dollar terms. Forecast in line with last quarter.

- Healthcare: EUR89.16bn (USD119.47bn) in 2014 to EUR89.51bn (USD98.46bn) in 2015; +0.4% in local currency terms and -17.6% in US dollar terms. Forecast revised downwards from last quarter.

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