Serbia Pharmaceuticals and Healthcare Report Q3 2015

Description:
A focus on reining in Serbia's bloated public sector following an agreement with the IMF will inevitably lead to cuts in healthcare spending. Furthermore, Serbia's healthcare authorities will continue to cut prices to reduce their pharmaceutical expenditure as a means to contain healthcare costs. We expect the growth outlook for the Serbian pharmaceutical market to worsen in the short-term as household and government consumption decline.

Headline Expenditure Projections Pharmaceuticals: RSD92.43bn (USD1.05bn) in 2014 to RSD97.15bn (USD872mn) in 2015; +5.1% in local currency terms and --16.6% in US dollar terms. Forecast unchanged from Q215.

Healthcare: RSD401.44bn (USD4.54bn) in 2014 to RSD415.54bn (USD3.73bn) in 2015; +3.5% in local currency terms and -17.9% in US dollar terms. Forecasts revised downwards from Q215 due to historical revision of data.

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