Singapore Pharmaceuticals and Healthcare Report Q4 2015

Description: Challenges to Singapore's medical tourism sector will intensify. Critically, the high cost of medical treatment relative to its regional peers will serve as a financial deterrent for foreign patients, which are further exacerbated by the strength of the Singapore dollar. In addition, government support has remained limited as compared with Thailand and Malaysia, which will see Singapore losing medical tourists to these competing hubs. This will in turn pose downside risks to multinational drugmakers as medical tourism has been a strong source of demand for high value medicines.

Headline Expenditure Projections
- Pharmaceuticals: SGD1.04bn (USD822mn) in 2014 to SGD1.1bn (USD808mn) by 2015; +5.3% in local currency terms and -1.7% in USD terms. Forecast maintained from previous quarter.

- Healthcare: SGD18.3bn (USD14.4bn) in 2014 to SGD19.6bn (USD14.5bn) by 2015; +7.7% in local currency terms and +0.5% in USD terms. Forecast maintained from previous quarter.

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