Portugal Pharmaceuticals and Healthcare Report Q4 2015

Description: Despite sustained economic growth and buoyant consumption indicators, high public and private debt levels in Portugal will remain a significant drag on the country's attractiveness to pharmaceutical companies. While hospital debt levels and payment delays have declined in 2015, the ongoing inability of public hospitals to manage their finances is still a cause for concern. Meanwhile, although we forecast the next government administration to take office after October 2015 to embark on an expansionary fiscal trajectory, Portugal's public sector debt burden will act as a major constraint on a more robust fiscal expansion, hindering repayments to drugmakers and the creation of a more sustainable, long-term payment facility by public hospitals.

Headline Expenditure Projections
- Pharmaceuticals: EUR3.25bn (USD4.36bn) in 2014 to EUR3.11bn (USD3.43) in 2015; -4.2% in local currency and -21.3% in US dollar terms. Forecast broadly in line with the last quarter in local currency terms and US dollar terms.

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