Spain Pharmaceuticals and Healthcare Report Q1 2016

Description:
We maintain our subdued outlook for the Spanish pharmaceutical market. Price caps on originator medicines have negatively impacted the country's generic drug sector, which lags behind other European markets. However, new measures to improve access to generic and biosimilar medicines will lead to greater opportunities for generic drugmakers operating in the country.

Headline Expenditure Projections
- Pharmaceuticals: EUR24.71bn (USD33.11bn) in 2014 to EUR25.18bn (USD27.70bn) in 2015; +1.9% in local currency terms and -16.3% in US dollar terms. Forecast unchanged from last quarter.

- Healthcare: EUR90.72bn (USD121.56bn) in 2014 to EUR91.69bn (USD100.86bn) in 2015; +1.1% in local currency terms and -17.0% in US dollar terms. Forecast in line with last quarter.

Contents:
Table: Headline Pharmaceuticals & Healthcare Forecasts (Spain 2013-2019)
SWOT
Industry Forecast
Pharmaceutical Market Forecast
Table: Pharmaceutical Sales, Historical Data And Forecasts (Spain 2011-2019)
Healthcare Market Forecast
Table: Healthcare Expenditure Trends, Historical Data And Forecasts (Spain 2011-2019)
Table: Government Healthcare Expenditure Trends, Historical Data And Forecasts (Spain 2011-2019)
Table: Private Healthcare Expenditure Trends, Historical Data And Forecasts (Spain 2011-2019)

Prescription Drug Market Forecast
Table: Prescription Drug Market Indicators, Historical Data And Forecasts (Spain 2011-2019)

Patented Drug Market Forecast
Table: Patented Drug Market Indicators, Historical Data And Forecasts (Spain 2011-2019)

Generic Drug Market Forecast
Table: Generic Drug Market Indicators, Historical Data And Forecasts (Spain 2011-2019)

OTC Drug Market Forecast
Table: Over-The-Counter (OTC) Medicine Market Indicators, Historical Data And Forecasts (Spain 2011-2019)

Pharmaceutical Trade Forecast
Table: Pharmaceutical Trade Data And Forecasts (Spain 2013-2019)
Table: Pharmaceutical Trade Data And Forecasts local currency (Spain 2013-2019)

Pharmaceuticals & Healthcare Risk/Reward Index
Western Europe Risk/Reward Index
Spain Risk/Reward Index
Rewards
Risks
Regulatory Review
Intellectual Property Issues
Parallel Trade
OTC Medicines
Generic Medicines
Pricing Regime
Reference Pricing System
Reimbursement Regime
Market Overview
Epidemiology
Healthcare Sector
Table: Regional Public Hospital Debt - Values In EURmn
Table: Healthcare Resources (Spain 2009-2014)
Table: Healthcare Personnel (Spain 2009-2014)
Table: Healthcare Activity (Spain 2009-2014)
Research & Development
Clinical Trials
Competitive Landscape
Pharmaceutical Sector
Generic Drug Sector
Table: Multinational Market Activity
Biotechnology Sector
Pharmaceutical Retail
Company Profile
Almirall
Esteve
Demographic Forecast
Demographic Outlook
Table: Population Headline Indicators (Spain 1990-2025)
Table: Key Population Ratios (Spain 1990-2025)
Table: Urban/Rural Population & Life Expectancy (Spain 1990-2025)
Table: Population By Age Group (Spain 1990-2025)
Table: Population By Age Group % (Spain 1990-2025)
Glossary
Methodology
Pharmaceutical Expenditure Forecast Model
Healthcare Expenditure Forecast Model
Notes On Methodology
Risk/Reward Index Methodology

Index Overview
Table: Pharmaceutical Risk/Reward Index Indicators

Indicator Weightings

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