Slovenia Pharmaceuticals and Healthcare Report Q2 2016

Description: Krka's exposure to Eastern European markets will continue to act as a drag on revenue growth. However, strong sales growth in Western Europe will mitigate the impact of revenue declines for the short term. We expect a continued focus on cost containment by European healthcare payers to moderate Krka's growth outlook over the longer term, unless the company looks to geographically diversify its exposure.

Headline Expenditure Projections

- Pharmaceuticals: EUR671mn (USD745mn) in 2015 to EUR645mn (USD690mn) in 2016; -3.9% in local currency terms and -7.3% in US dollar terms. Forecasts revised downwards compared to previous quarter.

- Healthcare: EUR3.22bn (USD3.58bn) in 2015 to EUR3.25bn (USD3.48bn) in 2016; 0.9% in local currency terms and -2.8% in US dollar terms. Forecasts revised slightly downwards compared to previous quarter.

Risk/Reward Index

Slovenia scores 56.0 out of a total of 100 in our Pharmaceutical Risk/Reward Index for Q216, up to 9th place from 11th place in the previous quarter. Slovenia scores above the average for the region, which is 52.6.

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