

Algeria Pharmaceuticals and Healthcare Report Q1 2016

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Abstracts

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BMI View: While the effects of the global oil price slump will slowdown Algeria's public and private spending growth rates over a multi-quarter horizon, the government will keep the modernisation of healthcare facilities and the expansion of drug manufacturing capacities among its priorities. Indeed, while we forecast a sharp decline in pharmaceutical imports in 2015, we expect import growth to pick up from 2016 onwards, albeit at a slower pace than in previous years, reflecting the expansion of local manufacturing capabilities as well as import restrictions. However, the growing demand for pharmaceuticals will not be sufficiently covered by local production, with the import of high-end products to grow as consumer affordability levels increase in line with economic improvement.

Risk/Reward Index

In Q116, we have revised Algeria's Pharmaceutical Risk/Reward Index (RRI) score upwards to 48.1 (out of 100) from 46.4 previously. This is above the regional average of 40.3. The score revision was driven by improved industry rewards indices and country rewards indices. Algeria is now in tenth place (up one position from last quarter) out of 31 countries in the Middle East and Africa region. Algeria's score is boosted by a large pharmaceutical market and a favourable long-term market development, but dragged down by the country's poor regulatory environment.

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Middle East and Africa Risk/Reward Index - Q1 2016

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