

Argentina Pharmaceuticals and Healthcare Report Q1 2016

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Abstracts

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BMI View: Robust pharmaceutical and healthcare market growth in Argentina will lead to improved opportunities for drugmakers over the next 10 years. Despite the government's increased focus on domestic pharmaceutical production, Argentina will retain its negative pharmaceutical trade balance and reliance on foreign patented drugs. Rising demand and healthcare costs will continue to translate to a pattern of regulatory mechanisms to allow for multiple payers to jointly negotiate prices for the bulk purchasing of drugs, both at the regional level under MERCOSUR structures and at the national level through Argentinean health coverage subsystems. Meanwhile, the increased attention on regulatory standard improvements, such as the recent creation of a biological medicines centre, as well as a skilled workforce, will contribute in fostering investor interest in Argentina.

Headline Expenditure Projections

Pharmaceuticals: ARS54.93bn (USD6.76bn) in 2014 to ARS64.46bn (USD7.12bn) in 2015; +17.3% in local currency terms and 5.3% in US dollar terms. Forecast revised upwards from last quarter.

Healthcare: ARS258.63bn (USD31.84bn) in 2014 to ARS277.19bn (USD30.63bn) in 2015; +7.2% in local currency terms and -3.8% in US dollar terms. Forecast broadly in line with last quarter.

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