

# Australia Pharmaceuticals and Healthcare Report Q1 2016

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## Abstracts

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**BMI View:** The prevailing trend of austerity targeting pharmaceuticals and healthcare spending in Australia will continue to weigh on the country's attractiveness to innovative drugmakers. On top of this, ongoing political instability and policy uncertainty have moderated the confidence to invest in Australia, with cooperation between the government and the pharmaceutical industry remaining sparse as their relations come under strain. Meanwhile, although the Trans-Pacific Partnership's latest outcome confirms Australia's attempt to balance incentives to innovation in the biopharmaceutical industry with cost containment concerns, the recent creation of a medical-research fund will provide some level of government support for research and innovation initiatives in the sector, albeit under a gradual and phased multi-year horizon.

### Headline Expenditure Projections

Pharmaceuticals: AUD13.48bn (USD12.15bn) in 2014 to AUD13.99bn (USD10.35bn) in 2015; +3.7% in local currency terms and -14.8% in US dollar terms, due to significant exchange rate fluctuations. Forecast in line with last quarter.

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