

Australia Pharmaceuticals and Healthcare Report Q4 2015

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Abstracts

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BMI View: The Australian pharmaceutical market is expected to continue on a moderate growth trajectory over our forecast period. This is mainly explained by rising chronic disease burden as well as government funding to list new medicines under the Pharmaceutical Benefit Scheme. However, revenue opportunities for multinational drugmakers in Australia will remain limited by cost containment measures. This was accentuated in the Sixth Pharmacy Community Agreement passed by authorities in June 2015, which drives a downgrade in our pharmaceutical market forecast for the country. Among the measures outlined, the move to allow biosimilar substitution in an attempt to curb spending on biologic drugs poses additional risks to innovative drugmakers with a strong portfolio of biologic treatments.

Headline Expenditure Projections

Pharmaceuticals: AUD13.48bn (USD12.15bn) in 2014 to AUD13.98bn (USD10.35bn) in 2015; +3.7% in local currency terms and -14.8% in US dollar terms, due to significant exchange rate fluctuations. Forecast revised downwards from last quarter.

Healthcare: AUD151.84bn (USD136.85bn) in 2014 to AUD156.99bn (USD116.18bn) in 2015; +3.4% in local currency terms and -15.1% in US dollar terms, due to exchange rate fluctuations. Forecast revised downwards from last quarter.

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