

# Cambodia Pharmaceuticals and Healthcare Report Q2 2012

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## Abstracts

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**BMI View:** The Association of Southeast Asia Nations (ASEAN) is becoming increasingly attractive to foreign investors given the association's plans to boost economic development through the ASEAN Economic Community (AEC) by 2015. Despite this we highlight that major improvements have to be made in Cambodia's regulatory processes, the government's commitment to healthcare and lowering corruption to attract foreign pharmaceutical and healthcare companies.

### Headline Expenditure Projections

Pharmaceuticals: CHR877bn (US\$217mn) in 2011 to CHR984bn (US\$236mn) in 2012; +12.3% in local currency terms and +8.9% in US dollar terms.

Healthcare: CHR2,982bn (US\$737mn) in 2011 to CHR3,312bn (US\$794mn) in 2012; +11.0% in local currency terms and +57.8% in US dollar terms.

Medical devices: CHR108bn (US\$27mn) in 2011 to CHR118bn (US\$28mn) in 2011; +9.8% in local currency terms and +6.5% in US dollar terms.

### Risk/Reward Rating:

In Q212, Cambodia continues to rank last out of the 18 key markets in our Asia Pacific Risk/Reward Ratings (RRRs), with a low score of 33.5. Given the country's poor governance and high level of corruption, it will remain low on investors' priorities until

there are improvements to its overall economic conditions.

## **Key Trends And Developments**

In February 2012, Germany-based Merck KGaA said its business in South East Asia will be facilitated by the AEC, which aims to promote economic development throughout ASEAN. In relation to Cambodia, the company said unmet medical needs offer great opportunities for its products.

In January 2012, the Ministry of Health reported that at least 72 children had died due to dengue fever in Cambodia in 2011, an increase of 89% year-on-year (y-o-y), compared with 38 deaths reported in 2010. The ministry said the incidence of dengue fever rose by 26% y-o-y to 15,805 cases in 2011. Ngan Chantha, the director of dengue control at the Ministry of Health, said the incidence of the disease rose and deaths increased due to a large breakout. Chantha attributed the rise to the severe floods that submerged most provinces in August-October 2011. He estimated Cambodia spent US\$7mn to counter the outbreak of the disease and provide medical attention.

### **BMI Economic View:**

Despite a slight uptick in the y-o-y rate of the consumer price index (CPI), to 5.6% in November 2011 from 5.3% in the previous month, we maintain our view that inflationary pressure in Cambodia will continue to cool in 2012. On a month-on-month (m-o-m) basis, headline CPI actually contracted in November (by 0.7%) for the first time since December 2010, led by a 1.3% m-o-m decline in food prices. Our view of steady or lower global food prices in the months ahead should help take the sting out of price pressure and, as such, we maintain our forecast of 3.0% average CPI in 2012.

### **BMI Political View:**

Continued cooperation between the Cambodian and Vietnamese governments regarding border delineation should help to boost bilateral economic cooperation between the countries. The improvement in border cooperation with Vietnam over recent years helps Cambodia score a relatively solid 70 out of 100 in the securities/external threat component of our short-term political risk ratings, though the unresolved border dispute with Thailand continues to be a drag on its overall score.

## Contents

- Executive Summary
- SWOT Analysis
- Cambodia Pharmaceuticals And Healthcare Industry SWOT
- Pharmaceutical Risk/Reward Ratings
  - Table: Asia Pacific Pharmaceutical Risk/Reward Ratings, Q212
- Rewards
- Risks
- Cambodia – Market Summary
- Regulatory Regime
- Intellectual Property Environment
- Counterfeit Medicines
- Pricing And Reimbursement
- Industry Trends And Developments
- Epidemiology
- Healthcare Sector
- Health Insurance
- Research & Development Sector
- Clinical Trials
- Medical Devices
- Industry Forecast Scenario
- Overall Market Forecast
  - Table: Pharmaceutical Sales, 2008-2016
- Key Growth Factors – Industry
  - Table: Overall Healthcare Expenditure, 2008-2016
  - Table: Government Healthcare Expenditure, 2008-2016
  - Table: Private Healthcare Expenditure, 2008-2016
- Key Growth Drivers – Macroeconomic
  - Table: Cambodia Economic Activity, 2011-2016
- Medical Device Market Forecast
  - Table: Medical Devices Sales, 2008-2016
- Pharmaceutical Trade Forecast
  - Table: Pharmaceutical Trade, 2008-2016
- Key Risks To BMI's Forecast Scenario
- Competitive Landscape
- Pharmaceutical Industry
- Pharmaceutical Company Developments
- Pharmaceutical Wholesale

Pharmaceutical Retail

Company Profiles

Local Companies

PharmaProduct Manufacturing

Cambodia Pharmaceutical Enterprise

Multinational Companies

Sanofi

Pfizer

Country Snapshot: Cambodia Demographic Data

Section 1: Population

Table: Demographic Indicators, 2005-2030

Table: Rural/Urban Breakdown, 2005-2030

Section 2: Education And Healthcare

Table: Education, 2002-2005

Table: Vital Statistics, 2005-2030

Section 3: Labour Market And Spending Power

Table: Employment Indicators, 2000-2004

Table: Consumer Expenditure, 2000-2009 (US\$m)

Glossary

BMI Methodology

How We Generate Our Pharmaceutical Industry Forecasts

Pharmaceuticals Risk/Reward Ratings Methodology

Ratings Overview

Table: Pharmaceutical Business Environment Indicators

Weighting

Table: Weighting Of Components

Sources

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