

# Cambodia Pharmaceuticals and Healthcare Report Q1 2012

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## Abstracts

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**BMI View:** Foreign pharmaceutical investors will place Cambodia low on their interest lists as the country is still plagued by corruption and ineffective or outdated regulation. In addition, the government's low healthcare expenditure means funding pressure will continue to hamper the development of pharmaceutical values in the country. We expect investors to increase their interest in this high growth potential market after the administration makes significant changes and improvements to its governance and other healthcare regulatory frameworks.

### Headline Expenditure Projections

Pharmaceuticals: CHR812.33bn (US\$194mn) in 2010 to CHR894.03bn (US\$217mn) in 2011; +10.1% in local currency terms and +11.6% in US dollar terms. Forecast unchanged from Q411.

Healthcare: CHR3,036.32bn (US\$725mn) in 2010 to CHR3,324.44bn (US\$806mn) in 2011; +9.5% in local currency terms and +11.1% in US dollar terms. Forecast up slightly due to macroeconomic factors

Medical devices: CHR101.38bn (US\$24mn) in 2010 to CHR109.64bn (US\$27mn) in 2011; +9.2% in local currency terms and +9.7% in US dollar terms. Forecast up from Q411. Business Environment Rating: Cambodia continues to languish at the foot of our Asia Pacific Pharmaceutical and Healthcare Business Environment Ratings (BERs) table, last out of the 18

pharmaceutical markets surveyed in the region, with a low score of 33.4 out of 100. The country will continue to have a low rank until significant improvements are made to eradicate corruption, establish and enforce regulatory frameworks and boost overall economic conditions.

## **Key Trends And Developments**

In October 2011, the director of dengue fever control at the Ministry of Health, Ngan Chantha, said there had been a significant rise in the number of cases reported, from 5,497 in 2010 to 12,392 for the first nine months in 2011. He attributed the significant rise to severe floods in the country.

In the same month, the Department of Drugs and Food (DDF) found that a significant number of pharmaceutical wholesalers in the country were unsure about the definition of counterfeit drugs. BMI believes such confusion will continue to fuel the counterfeit drug industry. Key sources of counterfeit pharmaceuticals to Cambodia are China, Pakistan and India.

**BMI Economic View:** Cambodia plans to spend close to US\$200mn (roughly 2% of GDP) to rebuild the country's damaged infrastructure following the worst flooding in a decade, the Minister of Economy and Finance has said. The government allocated US\$54mn from the 2011 budget to rehabilitation, with US\$90mn earmarked for 2012. Negotiations are underway with the Asian Development Bank (ADB) to secure a further US\$55mn for post-flood rehabilitation. While we acknowledge that reconstruction efforts should help cushion economic activity in 2012, we still expect the headline GDP growth rate to fall to 4.8% from a projected 6.3% in 2011.

**BMI Political View:** Cambodia's 2012 budget passed unopposed, with 86 votes in favour and none against. However, this seemingly smooth passage was notable for the mass opposition boycotts rather than bipartisan support, highlighting the country's splintered democratic framework. The dominance of the Cambodian People's Party (CPP) will ensure policy continuity in the short term. However, the lack of cohesion among the opposition parties suggests the threat of boycotts and walkouts will remain a concern.

## Contents

- Executive Summary
- SWOT Analysis
- Cambodia Pharmaceuticals And Healthcare Industry SWOT
- Pharmaceutical Business Environment Ratings
  - Table: Asia Pacific Pharmaceutical And Healthcare Business Environment Ratings, Q112
- 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, 2007-2015
- Key Growth Drivers – Industry
  - Table: Healthcare Expenditure, 2007-2015
  - Table: Government Healthcare Expenditure, 2007-2015
  - Table: Private Healthcare Expenditure, 2007-2015
- Key Growth Drivers – Macroeconomic
  - Table: Cambodia Economic Activity, 2011-2016
- Medical Devices Forecast
  - Table: Medical Device Sales, 2007-2015
- Pharmaceutical Trade Forecast
  - Table: Pharmaceutical Trade, 2007-2015
- Key Risks To BMI's Forecast Scenario
- Competitive Landscape
- Pharmaceutical Industry
- Pharmaceutical Company Developments

- Pharmaceutical Wholesale
- Pharmaceutical Retail
- Company Profiles
- Domestic 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)
  - Table: Average Annual Manufacturing Wages, 1996-2001
- Glossary
- BMI Methodology
- How We Generate Our Pharmaceutical Industry Forecasts
- Pharmaceuticals Business Environment Ratings
- Risk/Reward Ratings Methodology
- Ratings Overview
  - Table: Pharmaceutical Business Environment Indicators
- Weighting
  - Table: Weighting Of Components
- Sources

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