

Cambodia Pharmaceuticals and Healthcare Report Q3 2012

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Date: August 2012

Pages: 56

Price: US\$ 1,295.00 (Single User License)

ID: CD97819CBDBEN

Abstracts

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BMI View: Given the country's under-developed pharmaceutical industry and its membership in the Association of Southeast Asia Nations (ASEAN), Cambodia represents a good long-term investment for pharmaceutical firms. However, we highlight that it will remain low on investors' list given that its neighbouring countries such as Vietnam and Thailand have made significant progress in terms of healthcare provision and establishment of various regulations.

Headline Expenditure Projections

Pharmaceuticals: CHR877bn (US\$217mn) in 2011 to CHR984bn (US\$236mn) in 2012; +12.3% in local currency terms and +9.0% in US dollar terms. Forecast unchanged from Q212.

Healthcare: CHR2,982bn (US\$737mn) in 2011 to CHR3,312bn (US\$794mn) in 2012; +11.1% in local currency terms and +57.8% in US dollar terms. Forecast unchanged from Q212.

Medical devices: CHR108bn (US\$27mn) in 2011 to CHR118bn (US\$28mn) in 2011; +9.8% in local currency terms and +6.6% in US dollar terms. Forecast unchanged from Q212. **Risk/Reward Rating:** Cambodia continue to rank last out of the 18 key markets in BMI's Q312 Asia Pacific Risk/Rewards Ratings (RRR), with a below regional average (52.7) score of 33.5. While the general under-developed market represents long-term opportunities, corruption and poor

governance limit market potential.

Key Trends And Developments

In June 2012, the health ministry reported that there were 4,434 dengue fever cases in the first five months of 2012, causing 21 children's deaths. Comparing to 2011, this was an increase of 1,007 dengue cases and 8 deaths. Ngan Chanthan, the director of the dengue control programme stated that the country may be facing an outbreak.

In March 2012, the Cambodian Ministry of Commerce said the value of medicine and medical equipment imports rose by about 5% y-o-y to US\$124.3mn in 2011. Minister of Health Mam Bunheng said the medicine manufacturing sector is growing annually but imports are also increasing, the Phnom Penh Post reported. Bunheng emphasised the need for locally produced competitive medicines. Cambodia primarily imports medical products from India, South Korea, Pakistan, Thailand, Australia and Japan. At the time of writing, Cambodia pharmaceutical and medical devices trade data in 2011 are not available on UN commodities trade database.

BMI Economic View: Cambodia's high dollarisation rate, estimated to be 80%, should gradually fall over the coming years as market-friendly economic policies induce more confidence in the domestic currency. This, in turn, should leave the economy less exposed to external shocks.

BMI Political View: The ruling Cambodian People's Party (CPP)'s overwhelming victory in the recent communal elections suggests there is little threat to its tight grip on power as the 2013 general elections approach. This is a positive for foreign investors. However, there are growing risks of rising public unrest as the issue of land rights and forced evictions heats up as a result of the CPP's liberal foreign investment policies.

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