

# Cambodia Pharmaceuticals and Healthcare Report Q4 2012

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## Abstracts

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### BMI View:

Lacklustre efforts by the government to boost healthcare means that the Cambodia will be the least attractive to pharmaceutical investors as compared to its South East Asian peers as the population are unable to afford new treatments. Over the longer term we expect such trends to change and active participation in the Association of Southeast Asia Nations (ASEAN) Economic Community will boost its attractiveness.

### Headline Expenditure Projections

Pharmaceuticals: KHR718bn (US\$178mn) in 2011 to KHR806bn (US\$193mn) in 2012; +12.2% in local currency terms and +8.8% in US dollar terms. Growth forecast unchanged from Q312, although we have adjusted the absolute value following reassessment of the market size.

Healthcare: KHR2,982bn (US\$737mn) in 2011 to KHR3,312bn (US\$794mn) in 2012; +11.1% in local currency terms and +7.8% in US dollar terms. Forecast unchanged from Q312.

Medical Devices: KHR108bn (US\$27mn) in 2011 to KHR118bn (US\$28mn) in 2011; +9.8% in local currency terms and +6.6% in US dollar terms. Forecast unchanged from Q312.

Risk/Reward Rating: Cambodia remains last out of the 18 key markets in BMI's Q412 Asia Pacific Pharmaceutical Risk/Reward Ratings with a score of 33.5, significantly lower than the regional average of 53.3. Near-term risks include rampant corruption and poor healthcare provision although its membership in the ASEAN can boost its long-term attractiveness.

### **Key Trends And Developments**

In August 2012, a Chinese medical delegation comprising seven traditional Chinese medical doctors will offer five free clinic services in two cities of Cambodia - Phnom Penh and Siem Reap. The free clinic services aim to help local patients through Chinese traditional treatments, said Zhou Xiaobao, the delegation head.

In July 2012, DKSH Healthcare and GlaxoSmithKline (GSK) have signed an agreement under which DKSH Healthcare will distribute GSK's pharmaceutical and vaccine products in Cambodia.

### **BMI Economic View:**

Cambodia's high dollarisation rate, estimated to be 80%, should gradually fall over the coming years as market-friendly economic policies inspire more confidence in the domestic currency. This, in turn, should leave the economy less exposed to external shocks. BMI Political View; Cambodia's long-term political outlook largely depends on the ruling Cambodian People's Party (CPP)'s ability to address widespread corruption and income inequality, which have been fuelling public dissent against the government in recent years. Meanwhile, the lack of effective opposition to challenge the CPP at elections suggests that the party will continue to dominate the political scene over the coming years.

## Contents

- Executive Summary
- SWOT Analysis
- Cambodia Pharmaceuticals And Healthcare Industry SWOT
- Pharmaceutical Risk/Reward Ratings
  - Table: Asia Pacific Pharmaceutical Risk/Reward Ratings, Q412
- Rewards
- Risks
- 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 Indicators 2008-2016
- Key Growth Factors – Industry
  - Table: Healthcare Expenditure Indicators 2008-2016
  - Table: Healthcare Governmental Indicators 2008-2016
  - Table: Healthcare Private Indicators 2008-2016
- Key Growth Drivers – Macroeconomic
  - Table: Cambodia - Economic Activity, 2011-2016
- Medical Device Market Forecast
  - Table: Medical Devices Sales Indicators 2008-2016
- Pharmaceutical Trade Forecast
  - Table: Exports and Imports Indicators 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 (PPM)

Cambodia Pharmaceutical Enterprise

Multinational Companies

Sanofi

Pfizer

Demographic Outlook

Table: Cambodia's Population By Age Group, 1990-2020 ('000)

Table: Cambodia's Population By Age Group, 1990-2020 (% of total)

Table: Cambodia's Key Population Ratios, 1990-2020

Table: Cambodia's Rural And Urban Population, 1990-2020

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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