

Canada Pharmaceuticals and Healthcare Report Q1 2016

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Abstracts

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BMI View: We expect the incoming Liberal government in Canada to implement countercyclical economic measures, which will be beneficial for the pharmaceutical and healthcare sector. Tax breaks and investment in the economy through higher spending on infrastructure programmes will provide support to higher household consumption, while healthcare expenditure in the private sector will continue to outpace public healthcare spending growth. Meanwhile, the ongoing economic rebalancing away from commodity exports will see an increase in investment in manufacturing and non-oil sectors in the next years, eventually benefitting some health industries. However, despite rising demand for healthcare and medicine, cost containment measures and the increasing uptake of lower value generic medicines will weigh on overall industry value growth.

Headline Expenditure Projections

Pharmaceuticals: CAD22.93bn (USD20.75bn) in 2014 to CAD24.07bn (USD18.80bn) in 2015; +5.0% in local currency terms and -9.4% in US dollar terms. Forecast revised upwards in local currency terms and downwards in US dollar terms from last quarter.

Healthcare: CAD209.38bn (USD189.55bn) in 2014 to CAD215.44bn (USD168.32bn) in 2015; +2.9% in local currency terms and -11.2% in US dollar terms. Forecast revised downwards in local currency and US dollar terms from last quarter.

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