

# Croatia Pharmaceuticals and Healthcare Report Q1 2016

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## Abstracts

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**BMI View:** The Croatian Institute for Health Insurance (HZZO), since gaining its independence from the State Treasury at the start of 2015, will increasingly become more assertive in imposing its own policies on pharmaceutical expenditure and this will have considerable implications for the pharmaceutical sector in the country. While improving patient access to pharmaceuticals has been highlighted as a key objective of the HZZO, we also note that drug sales growth in Croatia will be moderated over the medium term.

### Headline Expenditure Projections

Pharmaceuticals: HRK7.01bn (USD1.23bn) in 2014 to HRK6.73bn (USD961mn) in 2015; -4.0% in local currency and -21.9% in US dollar terms. Forecast unchanged from Q415.

Healthcare: HRK22.70bn (USD3.99bn) in 2014 to HRK21.95bn (USD3.14bn) in 2015; -3.3% in local currency and -21.3% in US dollar terms. Forecast revised slightly downwards from Q415.

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