

# Croatia Pharmaceuticals and Healthcare Report Q3 2015

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## Abstracts

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**BMI View:** Successive governments' lack of budget discipline, weakening government revenues and concerns over the fiscal sustainability of healthcare spending will force the newly-independent national health insurer (HZZO) to make painful cuts. We expect this to hurt pharmaceutical expenditure as price restrictions are enacted. We expect growth in pharmaceutical sales to remain depressed over the short term, with serious implications towards Croatia's attractiveness to pharmaceutical companies.

### Headline Expenditure Projections

Pharmaceuticals: HRK6.83bn (USD1.20bn) in 2014 to HRK6.55bn (USD0.94bn) in 2015; -4.0% in local currency and -21.9% in US dollar terms. Forecast revised downwards from Q215.

Healthcare: HRK22.71bn (USD3.99bn) in 2014 to HRK21.98bn (USD3.14bn) in 2015; -3.2% in local currency and -21.2% in US dollar terms. Forecast revised down from Q215.

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