

# Croatia Pharmaceuticals and Healthcare Report Q4 2015

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## Abstracts

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**BMI View:** The Croatian Health Insurance Fund (HZZO)'s independence will enable it to further rationalise its healthcare expenditure without political interference. We see the HZZO utilising its purchasing power to drive down drug prices from pharmaceutical companies in return for wider reimbursement coverage. As a result, pharmaceutical sales growth in Croatia will be moderated over the medium-term, with negative implications for multinational drugmakers.

### Headline Expenditure Projections

Pharmaceuticals: HRK6.83bn (USD1.20bn) in 2014 to HRK6.55bn (USD936mn) in 2015; -4.0% in local currency and -21.9% in US dollar terms. Forecast unchanged from Q315.

Healthcare: HRK22.71bn (USD3.99bn) in 2014 to HRK22.03bn (USD3.15bn) in 2015; -3.0% in local currency and -21.1% in US dollar terms. Forecast revised slightly upwards from Q315.

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