

Estonia Pharmaceuticals and Healthcare Report Q1 2016

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Abstracts

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BMI View: Estonian pharmaceutical sales posted larger than expected growth in 2014, but we expect pharmaceutical sales growth to have decelerated in 2015 as the impact of the Russian slowdown moderates economic activity. With Estonia seeing external tailwinds from the eurozone and Scandinavian countries, we expect pharmaceutical sales to stay largely flat in 2016 and beyond. Western-Russian relations will continue to present downside risk to our forecasts.

Headline Expenditure Projections

Pharmaceuticals: Sales will rise from EUR292mn (USD391mn) in 2014 to EUR310mn (USD341mn) in 2015, up 6.1% in local currency terms and down 12.9% in US dollar terms. Forecast stayed flat from last quarter.

Healthcare: Spending will rise from EUR1.15bn (USD1.54bn) in 2014 to EUR1.22bn (USD1.34bn) in 2015, up 6.0% in local currency terms and down 13.0% in US dollar terms. Forecast stayed flat from last quarter.

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