

Estonia Pharmaceuticals and Healthcare Report Q2 2016

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Abstracts

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BMI View: We expect growth in Estonia's healthcare expenditure to decelerate over the long term given the country's fiscally conservative nature, the limited capacity of the national health insurer to accommodate further healthcare spending growth and BMI's outlook for the country's economy over the long term. Drugmakers can expect to see constrained revenue growth in the country as pricing pressures and restrictive drug reimbursement are employed by the Estonian health insurance fund to restrict healthcare expenditure.

Headline Expenditure Projections

Pharmaceuticals: Sales will rise from EUR310mn (USD341mn) in 2015 to EUR328mn (USD351mn) in 2016, up 6.0% in local currency terms and down 3.2% in US dollar terms. Forecast stayed flat from last quarter.

Healthcare: Spending will rise from EUR1.22bn (USD1.34bn) in 2015 to EUR1.29bn (USD1.38bn) in 2016, up 5.8% in local currency terms and down 2.9% in US dollar terms. Forecast stayed flat from last quarter.

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