

Estonia Pharmaceuticals and Healthcare Report Q3 2016

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Abstracts

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BMI View: Estonia's healthcare system is much more mature than its Central and Eastern European peers, but given the country's limited resources, the country is less appealing to pharmaceutical companies. 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 (USD344mn) in 2015 to EUR328mn (USD350mn) in 2016, up 5.8% in local currency terms and up 2.0% in US dollar terms. Forecast has been maintained from last quarter.

Healthcare: Spending will rise from EUR1.30bn (USD1.44bn) in 2015 to EUR1.36bn (USD1.46bn) in 2016, up 4.9% in local currency terms and up 1.46% in US dollar terms. Forecast has been increased from last quarter.

Contents

BMI Industry View

Table: Headline Pharmaceuticals & Healthcare Forecasts (Estonia 2014-2020)

SWOT

Industry Forecast

Pharmaceutical Market Forecast

Table: Pharmaceutical Sales, Historical Data And Forecasts (Estonia 2012-2020)

Healthcare Market Forecast

Table: Healthcare Expenditure Trends, Historical Data And Forecasts (Estonia 2012-2020)

Table: Government Healthcare Expenditure Trends, Historical Data And Forecasts (Estonia 2012-2020)

Table: Private Healthcare Expenditure Trends, Historical Data And Forecasts (Estonia 2012-2020)

Prescription Drug Market Forecast

Table: Leading Anatomical Therapeutic Chemical (ATC) Groups By Pharmaceutical Sales, 2004-2010 (%)

Table: Prescription Drug Market Indicators, Historical Data And Forecasts (Estonia 2012-2020)

Patented Drug Market Forecast

Table: Patented Drug Market Indicators, Historical Data And Forecasts (Estonia 2012-2020)

Generic Drug Market Forecast

Table: Generic Drug Market Indicators, Historical Data And Forecasts (Estonia 2012-2020)

OTC Medicine Market Forecast

Table: Over-The-Counter (OTC) Medicine Market Indicators, Historical Data And Forecasts (Estonia 2012-2020)

Pharmaceutical Trade Forecast

Table: Pharmaceutical Trade Data And Forecasts (Estonia 2014-2020)

Table: Pharmaceutical Trade Data And Forecasts local currency (Estonia 2014-2020)

Pharmaceuticals Risk/Reward Index

Central And Eastern Europe Risk/Reward Index - Q3 2016

Estonia Risk/Reward Index

Rewards

Risks

Regulatory Review

Intellectual Property Issues

Pricing Regime

Reimbursement Regime

Table: Key Health Insurance Indicators, 2007-2011

Table: Expenditure By Reimbursed Prescription Medicinal Products, 2005-2010 (EEK '000)

Market Overview

Healthcare Sector

Table: Healthcare Resources (Estonia 2010-2015)

Table: Healthcare Personnel (Estonia 2010-2015)

Table: Healthcare Activity (Estonia 2010-2015)

Table: HIF Healthcare Expenditure, 2006-2011 (EURmn)

Table: Reimbursement Spending By Key Therapeutic Area, 2010-2011 (EURmn)

Table: Medicinal Products Reimbursed For Insured Patients, 2009-2011 (EURmn)

Research And Development

Table: Members Of EBio, 2011

Clinical Trials

Table: Leading Causes Of Death, 2005-2010

Competitive Landscape

Research-Based Industry

Table: Members Of The Association Of International Pharmaceutical Manufacturers In Estonia

Table: Table: Multinational Market Activity

Generic Drugmakers

Pharmaceutical Distribution

Pharmaceutical Retail Sector

Table: Pharmacies And Pharmacy Market Ratios, 2004-2009

Company Profile

Grindeks (incorporating Tallinn Pharmaceutical Plant)

Demographic Forecast

Table: Population Headline Indicators (Estonia 1990-2025)

Table: Key Population Ratios (Estonia 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Estonia 1990-2025)

Table: Population By Age Group (Estonia 1990-2025)

Table: Population By Age Group % (Estonia 1990-2025)

Glossary

Methodology

Pharmaceutical Expenditure Forecast Model

Healthcare Expenditure Forecast Model

Notes On Methodology

Risk/Reward Index Methodology

Index Overview

Table: Pharmaceutical Risk/Reward Index Indicators

Indicator Weightings

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