

France Pharmaceuticals and Healthcare Report Q2 2016

<https://marketpublishers.com/r/F0B38545BF4EN.html>

Date: March 2016

Pages: 114

Price: US\$ 1,295.00 (Single User License)

ID: F0B38545BF4EN

Abstracts

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BMI View: Improving consumer and business indices for the French economy will continue to pose upside risks to the pharmaceuticals and healthcare sector's ongoing recovery in terms of growth rates. However, supply side factors will continue to weigh negatively on fixed investment rates in the pharmaceutical industry, as labour market structural deficiencies are not expected to recede in the foreseeable future. More broadly, as pharmaceutical firms seek to increase productivity in a short time frame whilst capping costs, we will likely continue to observe some degree of innovation in business models, such as the open innovation agreement signed in H215 between Sanofi and AstraZeneca. This will eventually allow for faster innovation rates through the direct exchange of 210,000 compounds from the companies' respective proprietary compound libraries.

Headline Expenditure Projections

Pharmaceuticals: EUR33.46bn (USD36.80bn) in 2015 to EUR33.37bn (USD35.71bn) in 2016; -0.3% in local currency terms and -3.0% in US dollar terms. Forecast broadly in line with last quarter.

Healthcare: EUR253.47bn (USD278.82bn) in 2015 to EUR261.32bn (USD279.61bn) in 2016; +3.1% in local currency terms and 0.3% in US dollar terms. Forecast revised slightly upwards from last quarter.

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