

France Pharmaceuticals and Healthcare Report Q3 2016

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Abstracts

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BMI View: Despite the ongoing recovery in some high frequency indicators, subdued economic growth in France relative to regional peers will continue to weigh on the French government spending potential, posing downside risks to our pharmaceutical and healthcare sector forecasts. In line with our view in the previous quarter, France's lack of structural reform will continue to tarnish the country's appeal to pharmaceutical investors. That said, France's position as one of the three largest pharmaceutical markets in Western Europe will underpin renewed commercial opportunities for drugmakers over a multi-year horizon, with market growth rates expected to return to positive territory in 2017.

Headline Expenditure Projections

Pharmaceuticals: EUR33.46bn (USD37.11bn) in 2015 to EUR33.33bn (USD35.66bn) in 2016; -0.4% in local currency terms and -3.9% in US dollar terms. Forecast revised slightly downwards from last quarter.

Healthcare: EUR252.15bn (USD279.66bn) in 2015 to EUR259.13bn (USD277.27bn) in 2016; +2.8% in local currency terms and -0.9% in US dollar terms. Forecast revised downwards from last quarter.

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