

# France Pharmaceuticals and Healthcare Report Q4 2016

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## Abstracts

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**BMI View:** The UK vote to leave the EU will weigh on France's economic growth over the next few quarters, which in turn will pose downside risks to our pharmaceutical and healthcare sector forecasts. Despite the large pharmaceutical market and high drug spending per capita, which will continue to make France a major global market for drugmakers, market expansion will only resume at a slow pace over the next few years, with return to marginal positive growth in 2017. In line with our view in recent quarters, the rate of investment growth in France's pharmaceutical sector has remained relatively subdued in H116, while this trend will likely continue over the coming quarters, in part due to sluggish labour market reform.

### Headline Expenditure Projections

Pharmaceuticals: EUR33.46bn (USD37.11bn) in 2015 to EUR33.34bn (USD35.68bn) in 2016; -0.3% in local currency terms and -3.9% in US dollar terms. Forecast broadly in line with last quarter.

Healthcare: EUR251.26bn (USD278.66bn) in 2015 to EUR257.25bn (USD275.26bn) in 2016; +2.4% in local currency terms and -1.2% in US dollar terms. Forecast revised downwards from last quarter.

## Contents

### BMI Industry View

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

### SWOT

### Industry Forecast

### Pharmaceutical Market Forecast

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

### Healthcare Market Forecast

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

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

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

### Prescription Drug Market Forecast

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

### Patented Drug Market Forecast

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

### Generic Drug Market Forecast

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

### OTC Medicine Market Forecast

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

### Pharmaceutical Trade Forecast

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

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

### Industry Risk/Reward Index

### Western Europe Risk/Reward Index

### France Risk/Reward Index

### Rewards

### Risks

### Regulatory Review

### Intellectual Property Issues

### Pricing & Reimbursement Regime

Table: France Reimbursement Categories

## Market Overview

### Healthcare Sector

Table: Projected Regional Ranking Of Physicians, 2017

Table: Healthcare Personnel (France 2010-2015)

Table: Healthcare Activity (France 2010-2015)

Table: Healthcare Resources (France 2010-2015)

### Research & Development

#### Clinical Trials

#### Epidemiology

#### Competitive Landscape

#### Research-Based Industry

Table: Table: Multinational Market Activity

#### Generic Drugmakers

#### Pharmaceutical Distribution

#### Pharmaceutical Retail Sector

#### Company Profile

#### GlaxoSmithKline

#### Ipsen

#### Merck & Co

#### Novartis

#### Sanofi

#### Servier

### Demographic Forecast

Table: Population Headline Indicators (France 1990-2025)

Table: Key Population Ratios (France 1990-2025)

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

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

Table: Population By Age Group % (France 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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