

Germany Pharmaceuticals and Healthcare Report Q2 2016

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Abstracts

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BMI View: Germany's macroeconomic environment will continue to be favourable for drugmakers and healthcare operators through 2016. Buoyant private consumption and higher public expenditure, brought about by migrant/refugee accommodation and social security payments, will appeal to multinational drugmakers. Furthermore, in order to mitigate Germany's dire demographics and growing social security spending brought about by an ageing population, there has been a broader trend in the introduction of novel and costly therapies in Germany, leading us to revise upwards our pharmaceuticals market forecast for 2016.

Headline Expenditure Projections

Pharmaceuticals: EUR46.50bn (USD51.15bn) in 2015 to EUR47.10bn (USD50.40bn) in 2016; 1.3% in local currency terms and -1.5% in US dollar terms. Forecast revised upwards from last quarter.

Healthcare: EUR326.08bn (USD358.69bn) in 2015 to EUR335.11bn (USD358.56bn) in 2016; +2.8% in local currency terms and -0.04% in US dollar terms. Forecast broadly in line with last quarter.

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