

Latvia Pharmaceuticals and Healthcare Report Q3 2015

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Abstracts

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BMI View: Latvia's pharmaceutical market offers stable growth, at least in local currency terms, although the country will continue to present a modest opportunity to larger multinational companies on account of its relatively small market size. Meanwhile, tensions between Ukraine and Russia are creating challenges for local manufacturers that have focused on exports to Russia and the Commonwealth of Independent States (CIS) region.

Headline Expenditure Projections

Pharmaceuticals: EUR313mn (USD419mn) in 2014 to EUR325mn (USD358mn) in 2015; +4.0% in local currency terms and -14.6% in US dollar terms. Forecast revised upwards slightly from previous quarter due to slightly upgraded on stability of health insurers revenues.

Healthcare: EUR970mn (USD1.30bn) in 2014 to EUR1.01bn (USD1.11bn) in 2015; +4.0% in local currency terms and -14.7% in US dollar terms. Forecast broadly unchanged on previous quarter.

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