

# Latvia Pharmaceuticals and Healthcare Report Q4 2016

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## Abstracts

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**BMI View:** Latvia's pharmaceutical and healthcare markets will be shaped by the country's ongoing fiscal austerity measures. Already severely underfunded, the healthcare sector is facing additional cuts which are proving highly unpopular with the public. Conversely, the pharmaceutical sector will experience significant growth in 2016, due to price increases rather than rising consumption. This will likely result in increased cost-containment initiatives, repressing patented medicine growth in the longer term.

### Headline Expenditure Projections

Pharmaceuticals: EUR425mn (USD463mn) in 2015 to EUR476mn (USD523mn) in 2016; +11.9% in local currency terms and 13.0% in US dollar terms. Forecast upgraded from previous quarter.

Healthcare: EUR1.03n (USD1.12bn) in 2015 to EUR1.07bn (USD1.18bn) in 2016; +4.3% in local currency terms and 5.3% in US dollar terms. Forecast upgraded from previous quarter.

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