

Netherlands Pharmaceuticals and Healthcare Report Q4 2015

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Abstracts

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BMI View: The Netherlands has a well-developed healthcare sector and a highly competitive pharmaceutical industry. With the Dutch economy entering a cyclical growth upswing, we expect higher consumer spending will provide a small boost to pharmaceutical sales in the near term. We forecast the pharmaceutical market will return to growth in 2016, the first time since 2011. Over the long term, medicine demand will be driven by the country's ageing population. However, market potential will continue to be dampened by the patent cliff, rising use of cheaper generic products and further drug price restrictions.

Headline Expenditure Projections

Pharmaceuticals: EUR5.92bn (USD7.93bn) in 2014 to EUR5.83bn (USD6.41bn) in 2015; -1.5% in local currency terms and -19.2% in US dollar terms. Forecast in line with last quarter.

Healthcare: EUR73.31bn (USD98.23bn) in 2014 to EUR74.33bn (USD81.76bn) in 2015; +1.4% in local currency terms and -16.8% in US dollar terms. Forecast revised downwards slightly from last quarter.

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