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Pakistan Pharmaceuticals and Healthcare Report Q4 2016

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Abstracts

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BMI View: Pakistan's pharmaceutical market will remain a low priority for innovative drugmakers. Downward price pressures on pharmaceutical prices coupled with uncertainty surrounding the country's policy direction impinge on potential commercial opportunities, while a fragmented procurement system hinders efforts to establish sales strategy. These factors result in an unattractive medicines market that will incentivise multinational pharmaceutical firms to invest in other emerging markets such as China or Indonesia where the risk and rewards are more favourable.

Headline Expenditure Projections

> Pharmaceuticals: PKR252bn (USD2.5bn) in 2015 to PRK274bn (USD2.6bn) 2016; +8.5% in local currency terms and +6.1% in US dollar terms.
>
> Healthcare: PKR740bn (USD7.2bn) in 2015 to PKR810bn (USD7.7bn) in 2016; +9.4% in local currency terms and +7.1% in US dollar terms.

Risk/Reward Index

Pakistan's Pharmaceutical Risk/Reward Index (RRI) score for Q416 is 41.7 out of 100. This places it in the 16th out of 19 other markets in the Asia Pacific region. This low score is driven by the below average industry rewards with a low spending per capita in USD (scoring 1.2 out of 12) as well modest sector value growth (6.0 out of 12.0). Similarly the country's instability further drags down the country's risk score (12.9 out of

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