

# Poland Pharmaceuticals and Healthcare Report Q1 2016

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## Abstracts

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**BMI View:** The Polish healthcare system faces significant reform under the newly elected Law and Justice party. We believe that a transition from Poland's current insurance based healthcare system to a tax financed healthcare system will be broadly positive for all stakeholders, including the pharmaceutical sector, as it will provide a more stable and larger source of revenue. Reimbursement criteria will also be loosened for innovative drugs, which in turn will be beneficial for multinational drugmakers operating in Poland.

### Headline Expenditure Projections

Pharmaceuticals: PLN32.04bn (USD10.15bn) in 2014 to PLN33.39bn (USD8.91bn) in 2015; +4.2% in local currency terms and -12.2% in US dollar terms. Forecast unchanged from last quarter.

Healthcare: PLN111.53bn (USD35.35bn) in 2014 to PLN115.81bn (USD30.92bn) in 2015; +3.8% in local currency terms and -12.5% in US dollar terms. Forecast in line with last quarter.

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