

Poland Pharmaceuticals and Healthcare Report Q3 2016

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Abstracts

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BMI View: Poland will remain one of the most attractive pharmaceutical and healthcare markets in the CEE region. Strong economic growth and the introduction of a tax-funded healthcare system will support strong market growth. Opportunities for innovative drugmakers will be significant, with an ageing population and increasing accessibility for advanced treatment. However, the potential for the formation of a Visegrad joint medicine agreement with the Czech Republic, Hungary and Slovakia pose both upside and downside risks to innovative drugmakers should it go ahead, as joint purchasing initiatives tend to bring pricing pressures which would boost sales whilst reducing profit margins.

Headline Expenditure Projections

Pharmaceuticals: PLN33.39bn (USD8.85bn) in 2015 to PLN34.90bn (USD8.58bn) in 2016; +4.5% in local currency terms and -3.1% in US dollar terms. Forecast revised downwards from last quarter.

Healthcare: PLN114.50bn (USD30.37bn) in 2015 to PLN120.79bn (USD29.71bn) in 2016; +5.5% in local currency terms and -2.2% in US dollar terms. Forecast revised downwards from last quarter.

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