

# Portugal Pharmaceuticals and Healthcare Report Q1 2016

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## Abstracts

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BMI View: Fiscal loosening by the newly-initiated Socialist-led government in Portugal and rising private consumption will benefit pharmaceutical sales in 2016. According to the latest data on market activity we have revised upwards our pharmaceutical market forecast, although operating challenges will remain due to high levels of debt in the public hospital sector. Meanwhile, with competitiveness to diminish due to the partial reversal of austerity measures, we do not see major room for Portuguese industrial sectors to become more attractive to investors in the near term, including the pharmaceutical sector. That said, longterm demand for healthcare due to an ageing population will keep translating into the need for access to medical treatment, supporting market growth over the forecast period.

## Headline Expenditure Projections

Pharmaceuticals: EUR3.43bn (USD4.59bn) in 2014 to EUR3.44bn (USD3.78bn) in 2015; 0.3% in local currency and -17.7% in US dollar terms. Forecast revised upwards from last quarter in local currency terms and US dollar terms.

Healthcare: EUR16.07bn (USD21.53bn) in 2014 to EUR15.82bn (USD17.41bn) in 2015; 0.3% in local currency and -17.7% in US dollar terms. Forecast revised downwards from last quarter in local currency terms and US dollar terms.

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