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Abstracts

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BMI View: Puerto Rico's importance as a major production hub for multinational pharmaceutical companies will moderate owing to drug patent expirations, production quality issues and a potential tax increase from the local government. However, relatively low production costs and a skilled workforce will continue to attract multinational pharmaceutical investment to the island, as illustrated by recent investment projects announced by US and European drugmakers including Bristol-Myers Squibb, Roche and Sartorius. Meanwhile, Puerto Rico's domestic pharmaceutical and healthcare market is expected to expand modestly over the forecast period, albeit facing headwinds due to an internal devaluation and public expenditure cuts triggered by government debt restructuring.

Headline Expenditure Projections

Pharmaceuticals: USD3.81bn in 2015 to USD3.82bn in 2016; +0.2%. Forecast revised slightly downwards from last quarter.

Healthcare: USD8.06bn in 2015 to USD8.38bn in 2016; +3.9%. Forecast in line with last quarter.

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