

Saudi Arabia Pharmaceuticals and Healthcare Report Q4 2016

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Abstracts

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BMI View: The combined value of Saudi Arabia's pharmaceutical and healthcare markets is the largest in the Middle East and Africa region. The Kingdom's National Transformation Program, a key part of Vision 2030, reinstates the government's commitment to improving healthcare provision in the country. Nonetheless, the rising burden of non-communicable diseases will place greater pressure on the country's health services, while opportunities for multinational pharmaceutical companies will develop in line with this. As such, we expect the private sector to play a pivotal role in healthcare expansion in Saudi Arabia over the long term, principally through private health insurance schemes.

Headline Expenditure Projections

Pharmaceuticals: SAR31.75bn (USD8.46bn) in 2015 to SAR35.14bn (USD9.37bn) in 2016; +10.7% in both local currency and US dollar terms. Forecast in line with Q316.

Healthcare: SAR142.86bn (USD38.10bn) in 2015 to SAR153.50bn (USD40.91bn) in 2016; +7.4% in local currency terms and US dollar terms. Forecast in line with Q316.

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