

# Spain Pharmaceuticals and Healthcare Report Q4 2015

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## Abstracts

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**BMI View:** Growth in the Spanish pharmaceutical market will remain sluggish over the coming years. Despite calls made by pharmaceutical companies for the implementation of a system that adequately rewards innovation and supports investment in future medicines, ongoing debt issues will result in the Spanish government remaining committed to fiscal consolidation. We expect the government to continue its promotion of lower-value generic medicines over patented medicines.

### Headline Expenditure Projections

Pharmaceuticals: EUR24.71bn (USD33.11bn) in 2014 to EUR25.18bn (USD27.70bn) in 2015; +1.9% in local currency terms and -16.3% in US dollar terms. Forecast revised upwards from last quarter.

Healthcare: EUR90.72bn (USD121.56bn) in 2014 to EUR91.70bn (USD100.87bn) in 2015; +1.1% in local currency terms and -17.0% in US dollar terms. Forecast revised upwards from last quarter.

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