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Abstracts

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BMI View: Roche's restructuring efforts within its manufacturing network are indicative of deep pipeline shifts. Tailored manufacturing capability will support the company's established biosimilar defence strategy as it prepares itself for erosion of key product revenues to begin in 2018. As part of an industry-wide trend, we expect to see further traditional small-molecule plants being decommissioned and investment being put into increasing in-house biologics capabilities.

Headline Expenditure Projections

Pharmaceuticals: CHF7.06bn (USD7.71bn) in 2014 to CHF7.07bn (USD7.27bn) in 2015; +0.10% in local currency terms and -5.8% in US dollar terms. Forecast stayed flat compared to last quarter.

Healthcare: CHF70.49bn (USD77.02bn) in 2014 to CHF71.88bn (USD73.89bn) in 2015; +2.0% growth in local currency terms and -4.1% in US dollar terms. Forecast revised slightly downwards from last quarter.

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