

Turkey Pharmaceuticals and Healthcare Report Q4 2015

<https://marketpublishers.com/r/T20D00DD420EN.html>

Date: September 2015

Pages: 126

Price: US\$ 1,295.00 (Single User License)

ID: T20D00DD420EN

Abstracts

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BMI View: New medicine pricing rules introduced by the Turkish government will enable drugmakers to raise their prices following years of price suppression. We expect these changes to boost pharmaceutical sales in value terms over the next 10 years and improve the commercial opportunities for pharmaceutical manufacturers. Despite this positive development, the pricing environment in Turkey will continue to be challenging for drugmakers due to the ongoing enforcement of other government cost-containment measures.

Headline Expenditure Projections

Pharmaceuticals: TRY18.72bn (USD8.56bn) in 2014 to TRY20.81bn (USD7.85bn) in 2015; +11.1% in local currency and -8.3% US dollar terms.

Healthcare: TRY95.78bn (USD43.78bn) in 2014 to TRY107.17bn (USD40.44bn) in 2015; +11.9% in local currency and -7.6% US dollar terms.

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