

United Arab Emirates Pharmaceuticals and Healthcare Report Q4 2015

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Abstracts

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BMI View: As a result of recent announcements from Al Ittihad Drug Store and the Dubai Health Authority (DHA), we have upgraded our forecast for the UAE's pharmaceutical and healthcare markets. The UAE will continue to be one of the most attractive pharmaceutical markets in the Middle East for both new and existing players given the country's fast and efficient drug approval process, diversified economy, and rapidly expanding population. Market growth will be further boosted by continued investment into specialty healthcare infrastructure and the roll out of mandatory health insurance. However, further medicine price cuts will continue to impact profit margins of innovative drugmakers.

Headline Expenditure Projections

Pharmaceuticals: AED9.46bn (USD2.58bn) in 2014 to AED10.32bn (USD2.81bn) in 2015; +9.1% in local currency terms and +9.2% US dollar terms. Forecast revised upwards from last quarter.

Healthcare: AED47.29bn (USD12.88bn) in 2014 to AED49.93bn (USD13.59bn) in 2015; +5.6% in local currency and US dollar terms. Forecast revised downwards from last quarter.

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