

United Kingdom Pharmaceuticals and Healthcare Report Q2 2016

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Abstracts

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BMI View: Although we retain our view that the UK will remain a member of the European Union after the Brexit referendum to be held on June 23, uncertainty over the outcome increased in the first months of 2016, and a Brexit would pose significant challenges to the UK and European pharmaceutical industries. The negative implications of a Brexit for the drug industry would include a reduction of scientific funding in the UK, a decrease in patient access to innovative medicines, an increase in market access barriers to multinational drugmakers and delays in the approvals of medicines. Although the UK government's recent decision to strengthen healthcare expenditure over the next few years is in line with our view of continued growth and rising demand in the sector, the potential effects of a Brexit on the economy pose downside risks to our pharmaceuticals and healthcare sector forecasts.

Headline Expenditure Projections

Pharmaceuticals: GBP26.20bn (USD40.04bn) in 2015 to GBP26.80bn (USD38.29bn) in 2016; +2.3% in local currency terms and -4.4% in US dollar terms. Forecast revised upwards from last quarter.

Healthcare: GBP155.16bn (USD237.11bn) in 2015 to GBP159.87bn (USD228.38bn) in 2016; +3.0% in local currency terms and -3.7% in US dollar terms. Forecast revised broadly in line with last quarter.

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