

South & Central America Pharmaceuticals Market Size and Forecast (2021 - 2031)

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Abstracts

The pharmaceuticals market in South and Central America is poised for significant growth, with projections indicating that it will reach a value of approximately US\$ 95.3 billion by 2031, up from US\$ 69.3 billion in 2024. This growth trajectory reflects a compound annual growth rate (CAGR) of 4.5% from 2025 to 2031, driven by various factors that are reshaping the healthcare landscape in the region.

Market Overview and Growth Drivers

The South and Central America pharmaceuticals market is primarily segmented into key countries, notably Brazil and Argentina, along with other nations in the region. The expansion of this market can be attributed to several critical factors, including a large and growing population, improvements in healthcare infrastructure, increased government investment in healthcare innovation, rising healthcare expenditures, and a heightened demand for medical treatments due to the increasing prevalence of chronic diseases.

Countries like Costa Rica and Brazil are emerging as attractive destinations for medical tourism, offering high-quality healthcare services at competitive prices. This influx of international patients seeking medical care has significantly boosted the demand for pharmaceuticals, particularly as more individuals pursue elective surgeries, cosmetic procedures, and specialized treatments. Brazil, in particular, is home to numerous Joint Commission International (JCI)-accredited hospitals and clinics, ensuring that patients receive care that meets international standards. The state of Pernambuco, with its capital Recife, has become a notable hub for medical tourism, housing over 2,000 healthcare facilities. In 2022, more than 120,000 medical tourists visited Recife for treatment, underscoring the region's growing reputation in the healthcare sector.

Market Segmentation Insights

The South and Central America pharmaceuticals market can be analyzed through various lenses:

By Molecule Type: The market is divided into Small Molecule and Biological/Biosimilar Products, with Small Molecule products holding the largest market share in 2024.

By Indication: The market is categorized into several therapeutic areas, including Metabolic Diseases, Cancer, Immunology, Respiratory Disorders, Cardiovascular Disorders, Neurology Disorders, Rare Diseases, and others. Cancer treatments are expected to dominate this segment in 2024.

By Product Type: The market is further segmented into Branded and Generic pharmaceuticals, with Branded products leading the market share.

By Drug Type: The market is divided into Prescription and Over-the-Counter (OTC) drugs, with Prescription drugs holding the largest share.

By Distribution Channel: The distribution of pharmaceuticals occurs through Hospital Pharmacies, Retail Pharmacies, and Online Pharmacies, with Hospital Pharmacies being the most significant channel in 2024.

Future Outlook

The future of the South and Central America pharmaceuticals market is characterized by a shift in power dynamics, with emerging regional players redefining the landscape of pharmaceutical innovation and market focus. Supply chains are expected to diversify strategically, reducing reliance on traditional hubs and enhancing agility in response to global uncertainties. Regulatory frameworks are also anticipated to evolve, incorporating digital tools and fostering cross-border collaborations to streamline approval processes.

According to Oxford Economics, the global pharmaceuticals market, valued at US\$ 1.5 trillion in 2023, is on a steady growth trajectory, with expected expansions of 3% in 2024, 4% in 2025, and 3.6% in 2026. This growth is influenced by changing healthcare needs, shifts in supply chains, and evolving regulatory environments. The pharmaceutical industry is undergoing a transformation driven by these factors, alongside increasing demand for specialized medicines and a wave of mergers and acquisitions that are reshaping the competitive landscape. Challenges such as regulatory complexities and cost pressures remain, necessitating greater agility and innovation within the sector.

Country-Specific Insights

Focusing on Brazil, the largest market in the region, the pharmaceuticals sector shows

considerable promise due to its vast population and expanding healthcare infrastructure. Brazil allocates approximately 9.47% of its GDP to healthcare, translating to around US\$ 161 billion. The country has a robust healthcare system, with a significant number of private hospitals and healthcare providers. In 2022, pharmaceutical sales in Brazil reached US\$ 20.67 billion, reflecting a 26.2% increase from the previous year.

The aging population in Brazil is also a critical factor, with projections indicating that by 2030, nearly 24% of the population will be aged 60 and above. This demographic shift is expected to drive demand for pharmaceuticals, particularly in the areas of chronic disease management and geriatric care. The high incidence of cancer in Brazil, with over 627,000 cases reported in 2022, further emphasizes the need for effective pharmaceutical interventions.

Key Players in the Market

The pharmaceuticals market is home to several prominent companies, including GSK Plc, F. Hoffmann-La Roche Ltd, Pfizer Inc, Merck & Co Inc, and Novartis AG, among others. These companies are actively pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and deliver innovative solutions to consumers.

In summary, the South and Central America pharmaceuticals market is on a path of robust growth, driven by demographic changes, healthcare advancements, and increasing demand for medical treatments. The evolving landscape presents both challenges and opportunities for stakeholders in the industry.

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