

Business Development & Licensing at a Glance

Biopharmaceutical Industry

Brazil

Pharma Meeting Brazil





Brazilian Pharmaceutical Market 2021 Retrospective

Brazil has continental dimensions and a population of more than 220 million inhabitants. It was responsible for 1.7% of global GDP in 2021, being the 13th global economy and the largest in Latin America.

Aligned with these figures, in 2021 the healthcare sector, which includes HMOs and hospitals, experienced a year of significant fluctuations moving BRL\$ 319.9 billion. It also recorded approximately BRL\$ 18 billion in mergers and acquisitions.

According to industry experts, HMOs benefited the most during the pandemic, as the health crisis reduced the number of exams and elective procedures, thus reducing their costs. On the other hand, the number of hospitalizations increased, raising hospital costs. In addition, the reduction in other services that tend to provide better returns also affected their results.

The pharmaceutical industry experienced a year of strong local development, achieving 14.6% growth year over year. This corresponds to BRL\$ 86.28 billion in total sales in the pharmacy channel in PPP (Pharmacy Purchase Price) values. When analyzing sales volume, the number of packages achieved 4.95 billion units accounting for a 4% increase year over year according to IQVIA.

Rx drugs lead the market with a share of approximately 70% of all drugs sold. This scenario has been repeating itself in recent years. Therefore, it is important to highlight sales growth for generic drugs that represent 16.16% of the total pharmaceutical market in values and 35.36% of sales in units, significantly higher growth than those recorded in the respective total markets.

It is interesting to note that pharmaceutical companies with a majority of Brazilian capital have the highest market share in the Brazilian pharmaceutical segment, corresponding to 60.23% in 2021. This situation is repeated more markedly when it comes to sales in units, achieving the 80.39% mark.

As a result of this strong share, currently 6 of the 10 largest Brazilian pharmaceutical companies in operation in Brazil rank among the top 10 in revenues.

In a country of continental dimensions, it is also interesting to note the distribution of drug sales in units according to the geographic region. Thus, the Southeast region holds 45.88% of sales, followed by the Northeast region with 22.43%, South with 19.6%, Midwest with 7.37% and North region with 4.72% of the share. Among the states, São Paulo leads unit sales with a 26.64% share over the total number of units sold in the country.

These figures together place Brazil as a strong candidate to rank fifth in the global pharmaceutical market in values in 2023, behind the U.S., China, Japan and Germany according to IQVIA's forecast.

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