Russia Generics and Biosimilars

Description: The Generics market in Russia is dominated by foreign manufacturers in terms of value, despite high volume sales of local products. However, a raft of protectionist measures aimed at boosting the domestic manufacturing industry threaten to change the market landscape and will prompt a change in tactics by foreign branded manufacturers looking to maintain their lead.

Features and benefits
- Contains key market metrics to help you identify trends and assess the most attractive areas of the market to operate in
- Examines the drivers and resistors that will give you insight into how the market is evolving and what actions you can take to succeed
- Analyses recent laws and regulations, their impact on the market and helps you avoid unnecessary regulatory compliance costs

Highlights
Despite high volume uptake, generics still only account for a small proportion of the total market value in Russia. However, the market share of local generics companies is slowly increasing as a result of import substitution policies and support for the local industry.

The generics industry in Russia is complex and fragmented, dominated by a small number of international generics manufacturers. These companies enjoy preferential uptake, driven by their perceived superiority in terms of safety and efficacy to domestically manufactured generics, with Russians choosing to pay higher prices for guaranteed quality.

Your key questions answered
- Who are the leading generics players in the Russian market?
- How does the generics market size and volume and value uptake in Russia compare to key developed and emerging markets?

Contents:
Overview

Executive Summary
- Generics market
- Biosimilars market

Generics Market Dynamics

Russia generics volume uptake
Russia generics value uptake
Russia generics market size

Generics Drivers and Resistors
Despite reimbursement programs there are significant out-of-pocket costs
Import substitution policies aim to increase the share of domestically manufactured generics
Domestic GMP standards are poor but are set to improve

Lack of adequate pharmacovigilance puts patients at risk and reduces trust

Patients prefer branded generics

Generics to benefit from compulsory INN prescribing

Generics may benefit from simplified registration process

Key generics players

- International funds invest in Pharmstandard
- Ratiopharm acquisition gives Teva a leading role in Russia
- Stada sees high growth levels in the Russian market
- Novartis holds a strong position in Russia through Sandoz, Lek, and Hexal
- Zentiva continues to shine in the Russian market for Sanofi

Biosimilars Market Dynamics

Development costs and lack of regulation is attractive to biosimilar manufacturers

Biosimilars available in Russia

Russia presents challenges for monoclonal antibody manufacturers

Bibliography

Figure 1: Russia generic volume uptake versus other key pharmaceutical markets (%), 2008–11

Figure 2: Russia generic value uptake versus other key pharmaceutical markets (%), 2008–11

Figure 3: Russia generics market size versus other key pharmaceutical markets ($bn), 2008–11

Figure 4: Key factors impacting generics uptake in Russia, 2010

Figure 5: Key factors impacting biosimilars uptake in Russia

Figure 6: Drivers of and resistors to biosimilar monoclonal antibody entry in Russia

Table 1: Generic volume/value uptake (%) and market size ($bn) in key pharmaceutical markets including Russia, 2008–11

Table 2: Generics volume and value uptake in different segments of the Russian pharmaceutical market (%), 2010

Table 3: Biosimilars registered in Russia, 2009

Table 4: Examples of approved clinical trials in Russia for biosimilars during 2011–12

Ordering:

Order Online - http://www.researchandmarkets.com/reports/2519003/

Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

<table>
<thead>
<tr>
<th>Product Name:</th>
<th>Russia Generics and Biosimilars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Address:</td>
<td><a href="http://www.researchandmarkets.com/reports/2519003/">http://www.researchandmarkets.com/reports/2519003/</a></td>
</tr>
<tr>
<td>Office Code:</td>
<td>SCD2ILFS</td>
</tr>
</tbody>
</table>

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th>USD 1900</th>
<th>USD 4750</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) - Single User</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electronic (PDF) - Enterprisewide</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title:  | Mr  | Mrs  | Dr  | Miss  | Ms  | Prof |
First Name: |                                |
Email Address: * |
Job Title:                                |
Organisation:                                |
Address:                                    |
City:                                        |
Postal / Zip Code:                          |
Country:                                    |
Phone Number:                                |
Fax Number:                                  |

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:

Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB8533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ________________________

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp