Russia Pharmaceuticals and Healthcare Report Q2 2015

Description: BMI View: Given the depreciation of the rouble, we expect price rises and drug supply concerns to force the government to further intervene in the pharmaceutical market over the course of 2015. Despite the volatility of the Russian rouble and the considerable operating risks in the country, we believe that multinational pharmaceutical companies will remain committed to operating and investing in the country’s pharmaceutical market, given the underlying disease burden in the country, the large absolute size of the pharmaceutical market and the expected growth in pharmaceutical consumption.

Headline Expenditure Projections

- Pharmaceuticals: RUB879.67bn (USD22.80bn) in 2014 to RUB999.93bn (USD16.00bn) in 2015; +13.7% in local currency terms and -29.8% in US dollar terms.

- Healthcare: RUB4.81trn (USD124.75bn) in 2014 to RUB5.240bn (USD83.84bn) in 2015; 8.9% in local currency terms and -32.8% in US dollar terms.

Contents:

BMI Industry View 7

SWOT 9

Political 11

Economic 12

Operational Risk 13

Industry Forecast 15

Pharmaceutical Market Forecast 15
Table: Pharmaceutical Sales, Historical Data And Forecasts (Russia 2011-2019) 16

Healthcare Market Forecast 17
Table: Healthcare Expenditure Trends, Historical Data And Forecasts (Russia 2011-2019) 19
Table: Government Healthcare Expenditure Trends, Historical Data And Forecasts (Russia 2011-2019) 20
Table: Private Healthcare Expenditure Trends, Historical Data And Forecasts (Russia 2011-2019) 21

Prescription Drug Market Forecast 22
Table: Prescription Drug Market Indicators, Historical Data And Forecasts (Russia 2011-2019) 23

Patented Drug Market Forecast 24
Table: Patented Drug Market Indicators, Historical Data And Forecasts (Russia 2011-2019) 25

Generic Drug Market Forecast 26
Table: Generic Drug Market Indicators, Historical Data And Forecasts (Russia 2011-2019) 27

OTC Medicine Market Forecast 28
Table: Over-The-Counter (OTC) Medicine Market Indicators, Historical Data And Forecasts (Russia 2011-2019) 29
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