Russia Pharmaceuticals and Healthcare Report Q4 2015

Description: Further drug price inflation in Russia will push squeezed consumers and constrained healthcare payers into choosing lower-value pharmaceuticals, and we expect this to benefit domestic companies at the expense of foreign drugmakers. Similarly, the passage of state legislation, while enabling drug price rises, will also introduce further state control over pharmaceutical pricing. This will weaken the negotiating position of pharmaceutical companies, hurting the growth outlook of the Russian pharmaceutical market.

Headline Expenditure Projections
- Pharmaceuticals: RUB885.67bn (USD22.96bn) in 2014 to RUB1.02trn (USD17.53bn) in 2015; +14.8% in local currency terms and -23.7% in US dollar terms. Forecast unchanged from last quarter.

- Healthcare: RUB4.85trn (USD125.61bn) in 2014 to RUB5.29trn (USD91.22bn) in 2015; +9.2% in local currency terms and -27.4% in US dollar terms. Forecast unchanged from last quarter.

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