Russia's healthcare market is in a precarious position due to a severe lack of funding and an escalating burden of disease. The country's economic recession will see further pressure placed on the population for provision of care. Amendments to Russia's pharmaceutical legislation will, however, favour domestically-produced medicines over foreign drugmakers and multinational drugmakers will be pressured to establish a domestic manufacturing presence to comply to related new regulations. Nonetheless, given its sheer market size and unmet potential, the country will remain attractive for investment by multinational pharmaceutical firms for long-term growth.

Headline Expenditure Projections

- Pharmaceuticals: RUB1.02trn (USD16.58bn) in 2015 to RUB1.15trn (USD15.42bn) in 2016; +12.7% in local currency terms and -7.0% in US dollar terms. Forecast unchanged from last quarter.

- Healthcare: RUB5.29trn (USD86.31bn) in 2015 to RUB5.75trn (USD77.30bn) in 2016; +8.6% in local currency terms and -10.4% in US dollar terms. Forecast unchanged from last quarter.

Contents:

- Table: Headline Pharmaceuticals & Healthcare Forecasts (Russia 2014-2020)
- SWOT
- Industry Forecast
- Pharmaceutical Market Forecast
- Table: Pharmaceutical Sales, Historical Data And Forecasts (Russia 2012-2020)
- Healthcare Market Forecast
- Table: Healthcare Expenditure Trends, Historical Data And Forecasts (Russia 2012-2020)
- Table: Government Healthcare Expenditure Trends, Historical Data And Forecasts (Russia 2012-2020)
- Table: Private Healthcare Expenditure Trends, Historical Data And Forecasts (Russia 2012-2020)
- Prescription Drug Market Forecast
- Table: Prescription Drug Market Indicators, Historical Data And Forecasts (Russia 2012-2020)
- Patented Drug Market Forecast
- Table: Patented Drug Market Indicators, Historical Data And Forecasts (Russia 2012-2020)
- Generic Drug Market Forecast
- Table: Generic Drug Market Indicators, Historical Data And Forecasts (Russia 2012-2020)
- OTC Medicine Market Forecast
- Table: Over-The-Counter (OTC) Medicine Market Indicators, Historical Data And Forecasts (Russia 2012-2020)
- Pharmaceutical Trade Forecast
- Table: Pharmaceutical Trade Data And Forecasts (Russia 2014-2020)
- Table: Pharmaceutical Trade Data And Forecasts local currency (Russia 2014-2020)
- Industry Risk/Reward Index
- Central And Eastern Europe Risk/Reward Index
- Russia Risk/Reward Index
- Rewards
- Risks
- Regulatory Review
- Intellectual Property Issues
- Pricing Regime
- Reimbursement Regime
- Market Overview
- Healthcare Sector
- Table: Healthcare Resources (Russia 2010-2015)
- Table: Healthcare Personnel (Russia 2010-2015)
- Table: Healthcare Activity (Russia 2010-2015)
- Research & Development
- Clinical Trials
- Competitive Landscape
- Research-Based Industry
- Table: Multinational Market Activity
- Generic Drugmakers
- Pharmaceutical Retail Sector
- Company Profile
- Johnson & Johnson
- Novartis
- Pharmstandard
- Veropharm
- Demographic Forecast
- Demographic Outlook
- Table: Population Headline Indicators (Russia 1990-2025)
- Table: Key Population Ratios (Russia 1990-2025)
- Table: Urban/Rural Population & Life Expectancy (Russia 1990-2025)
- Table: Population By Age Group (Russia 1990-2025)
- Table: Population By Age Group % (Russia 1990-2025)
- Glossary
- Methodology
- Pharmaceutical Expenditure Forecast Model
- Healthcare Expenditure Forecast Model
- Notes On Methodology
- Risk/Reward Index Methodology
- Index Overview
- Table: Pharmaceutical Risk/Reward Index Indicators
- Indicator Weightings

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