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Russia Pharmaceuticals and Healthcare Report Q3 2016

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Abstracts

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BMI View: 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 with 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: RUB1.0trn (USD16.6bn) in 2015 to RUB1.2trn (USD16.8bn) in 2016; +18.9% in local currency terms and +1.1% in US dollar terms. Forecast unchanged from last quarter.

Healthcare: RUB5.4trn (USD88.2bn) in 2015 to RUB5.7trn (USD78.5bn) in 2016; +4.8% in local currency terms and -10.9% in US dollar terms. Forecast downgraded from last quarter.

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