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Abstracts

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BMI View: Russia's cooling of relations with the West is putting pressure on foreign investment in the country. With the EU and the US applying further sanctions, the business environment in the country is deteriorating. As the government pushes through protectionist measures, localisation by drugmakers will continue. However, we maintain that over the longer term the country's ageing population and significant disease burden will act to underpin pharmaceutical expenditure growth.

Headline Expenditure Projections

Pharmaceuticals: RUB786.50bn (USD24.68bn) in 2013 to RUB857.34bn (USD24.36bn) in 2014; +9.0% in local currency terms and -1.3% in US dollar terms.

Healthcare: RUB4,368bn (USD137.06bn) in 2013 to RUB4,608bn (USD130.91bn) in 2014; 5.5% in local currency terms and -4.5% in US dollar terms.

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