

Ukraine Pharmaceuticals and Healthcare Report Q4 2015

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Abstracts

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BMI View: Ukraine's pharmaceutical market will continue to experience inflationary dynamics in 2015, as the impact of the country's economic instability and the Ukrainian hryvnia's depreciation contribute to drug price inflation. We expect market share will further shift towards domestic pharmaceutical companies as the price of imported medicines makes them increasingly unaffordable to consumers. As a result, Ukraine's attractiveness to multinational drugmakers will decline significantly in the short-term.

Headline Expenditure Projections

Pharmaceuticals: UAH40.24bn (USD3.35bn) in 2014 to UAH46.84bn (USD1.95bn) in 2015; +16.4% in local currency terms and -41.8% in US dollar terms. Forecast unchanged from Q315. Healthcare: UAH114.62bn (USD9.54bn) in 2014 to UAH122.08bn (USD5.09bn) in 2015; +6.5% in local currency terms and -46.7% in US dollar terms. Forecast unchanged from Q315.

Contents

BMI Industry View

SWOT

Political

Economic

Operational Risk

Industry Forecast

Pharmaceutical Market Forecast

Table: Pharmaceutical Sales, Historical Data And Forecasts (Ukraine 2011-2019)

Healthcare Market Forecast

Table: Healthcare Expenditure Trends, Historical Data And Forecasts (Ukraine 2011-2019)

Table: Government Healthcare Expenditure Trends, Historical Data And Forecasts (Ukraine 2011-2019)

Table: Private Healthcare Expenditure Trends, Historical Data And Forecasts (Ukraine 2011-2019)

Prescription Drug Market Forecast

Table: Prescription Drug Market Indicators, Historical Data And Forecasts (Ukraine 2011-2019)

Patented Drug Market Forecast

Table: Patented Drug Market Indicators, Historical Data And Forecasts (Ukraine 2011-2019)

Generic Drug Market Forecast

Table: Generic Drug Market Indicators, Historical Data And Forecasts (Ukraine 2011-2019)

OTC Medicines Market Forecast

Table: Over-The-Counter (OTC) Medicine Market Indicators, Historical Data And Forecasts (Ukraine 2011-2019)

Pharmaceutical Trade Forecast

Table: Pharmaceutical Trade Data And Forecasts (Ukraine 2013-2019)

Table: Pharmaceutical Trade Data And Forecasts local currency (Ukraine 2013-2019)

Key Risks To BMI's Forecast Scenario

Macroeconomic Forecasts

Economic Analysis

Real GDP By Expenditure Breakdown

Risks To Outlook

Table: GDP By Expenditure (Ukraine 2012-2019)

Industry Risk Reward Indices

Central And Eastern Europe Risk/Reward Index - Q4 2015

Ukraine Risk/Reward Index

Rewards

Risks

Market Overview

Industry Trends And Developments

Epidemiology

Table: Ukrainian Cancer Incidence Rates, 2012-2035

Healthcare System

Healthcare System Reforms

Healthcare Funding

Table: Healthcare Resources (Ukraine 2009-2014)

Table: Healthcare Personnel (Ukraine 2009-2014)

Table: Healthcare Activity (Ukraine 2009-2014)

Research and Development

Clinical Trials

Regulatory Development

Regulatory Regime

Recent Regulatory Developments

Pharmaceutical Advertising

Counterfeit Drugs

Intellectual Property Issues

Pricing Regime

Recent Pricing Regime Developments

Reimbursement Regime

Competitive Landscape

Pharmaceutical Industry

Generic Drugmakers

Research-Based Industry

Table: Association of International Manufacturers (AIPM) Ukraine Members, 2015

Pharmaceutical Wholesale

Pharmaceutical Retail

Company Profile

Arterium

Farmak

Gedeon Richter

Krka

Lek (Novartis/Sandoz)

GlaxoSmithKline

Sanofi

Demographic Forecast

Table: Population Headline Indicators (Ukraine 1990-2025)

Table: Key Population Ratios (Ukraine 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Ukraine 1990-2025)

Table: Population By Age Group (Ukraine 1990-2025)

Table: Population By Age Group % (Ukraine 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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