

# Branded Generics in South East Asia: Current and Future Opportunities

<https://marketpublishers.com/r/B683678DB60EN.html>

Date: March 2012

Pages: 78

Price: US\$ 945.00 (Single User License)

ID: B683678DB60EN

## Abstracts

With its fast-growing, young population and projected pharmaceutical sales in excess of \$20 billion in 2014, countries in the Association of South East Asian Nations (ASEAN) represent a great opportunity for Pharma.

However, with regional marketing practices, uncertain production values of locally manufactured generics and a huge diversity in healthcare delivery across ten nations of varying income levels, there are also great challenges.

Despite the disadvantages large multinationals face, major pharmaceutical companies are diving into the region, focusing on revenue from new chemical entities and developing 'branded' generics as key investments.

But given regional dynamics, pro-generic legislation, inconsistent IPR enforcement and local industry protection, what are the factors that the industry can leverage to drive success?

## Report Overview

Based on interviews with ten of the region's most experienced industry experts, Branded Generics in S.E. Asia: Current and Future Opportunities explores why the pharmaceutical industry is focusing on branded generics and new chemical entity (NCE) revenues. Timely and packed with essential details, the report describes the current state-of-play, the future of branded generics and the physician, prescriber and patient dynamics that govern drug dispensing.

By offering insight into the complex forces at work, this comprehensive report provides

the critical intelligence necessary for success within the region. Can Big Pharma firmly insert itself into such a vibrant but locally-dominated market? Branded Generics in S.E. Asia: Current and Future Opportunities has the answers.

## **Key Report Features**

Insight into why ASEAN markets are difficult for multinationals to penetrate

Timely, targeting information on regional dynamics

Discussion of ASEAN harmonization, how it is challenging regulatory and manufacturing standards and how that will impact local players

The role of government intervention, particularly in pro-generic legislation

The impact of local industry protection in creating barriers for multinationals

Strategies the industry is employing to take advantage of quality control legislation

Overview of regional economics

## **Key Benefits**

Gain insight into the complexity of the ASEAN region

Deepen your understanding of the current market situation in South East Asia

Find out how pro-generic legislation, local industry protection and manufacturing weaknesses have resulted in a lack of regional leaders

Gain insight into why most—but not all—local companies won't survive ASEAN harmonization

Find out how success will be dependent upon quickly adapting to new regulatory standards and marketing the right branded generics to suit regional demographics

Receive insight into major commercial opportunities

### **Key Questions Answered**

What are the main challenges facing Big Pharma in South East Asia?

How can multinationals effectively gain traction in ASEAN countries?

Who is best adapting to regional conditions and how is it being done?

What are the conditions favouring local producers?

Who are the key decision makers and what are the factors influencing them?

How can multinationals adapt to changing government regulation?

What is the net benefit of establishing relationships with local companies?

### **Who Would Benefit From This Report?**

This report will be of value to senior pharma directors and managers with responsibilities in the following areas:

Executive management

Licensing/Business development

Market research and business intelligence

Marketing, category and product management

Key account and territory management

Emerging market development

Regulatory and government affairs

## Key Quotes

“What’s important is where the power lies, so when the power lies with the doctor, we have a branded generics kind of a market. When the power lies with the payer, which could be the government, insurance scheme, wholesaler or the pharmacies, then it becomes a more or less an unbranded generics market.” – Manish Bajaj, Senior Director Strategy for Branded Generics Markets, Dr Reddy’s

“At present the jury is still out. Companies have started launching their branded generic brands but I can't say for sure that success is guaranteed in South East Asia.” – Dr. Suchitra Kataria, former Head of Business Development and In-Licensing - Regional Strategic Development Asia Pacific at Bayer Schering Pharma, Singapore

“If you really talk about success in terms of 20-25 years... the branded generics market will move to a more unbranded generics market as we have seen in Europe.” – Manish Bajaj, Senior Director Strategy for Branded Generics Markets, Dr Reddy’s

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## **ACKNOWLEDGMENTS**

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