

Emerging Pharmaceutical Markets 2012

<https://marketpublishers.com/r/E07DF89675AEN.html>

Date: May 2011

Pages: 222

Price: US\$ 3,907.00 (Single User License)

ID: E07DF89675AEN

Abstracts

The robust growth in the pharmaceutical markets of emerging world economies has outpaced the overall growth of the global pharmaceutical market. The emerging markets are being driven by rapidly growing economies of these countries, increasing per capita income, increasing prevalence of lifestyle diseases due to rapid urbanization, and low-cost factors. Mainly due to strong performance in the emerging pharmaceutical markets, the global pharmaceutical market is expected to reach US\$ 1,020 Billion by the end of 2012. This research study provides extensive and coherent information about pharmaceutical markets in emerging countries. It also gives a detailed statistical and analytical review on the demographics, macroeconomic indicators, disease profile, key drivers and restraints of the emerging pharmaceutical markets.

The report covers all the key aspects of the various emerging pharmaceutical markets and has broadly outlined the factors that are affecting the industry. The report also provides current and predicted future performance of the pharmaceutical market in different regions of the world. Key countries of each region have been covered and the status of pharmaceutical industry has been provided. Moreover, the report provides information regarding therapeutic segments and key companies. Besides, detail information regarding generics, patented drugs and prescription drugs have been included for all the countries. It provides segment level analysis of the industry along with emerging trends on intellectual property, market opportunities, research collaborations, partnership activities, and guidelines for establishing new ventures. The research will help consultants, industry analysts, and vendors to get in-depth knowledge of the current, past, and future performance of the emerging pharmaceutical markets.

The global pharmaceutical market experienced exponential growth over the past decade but is now witnessing a slump. This slump is attributed to saturation in key markets such as United States and Western Europe, patent expiry of key drug formulations and a static economy. On the other hand, many growing economies in the

developing regions of Asia and Latin America are witnessing a continuous high growth rate in the pharmaceutical sector. In the coming years, these markets are expected to continue their robust growth owing to various factors such as increasing prevalence of lifestyle diseases, rise in spending on healthcare and increased access and affordability to healthcare services. This seismic shift in the pharmaceutical markets of the world, away from the major developed powers of the U.S., Japan, France, Germany, Italy, United Kingdom, Spain and Canada to a set of new, dynamic, fast-growing emerging economies of China, Brazil, Russia, India, Mexico, Turkey, and South Korea has created new dynamics. These seven emerging markets of the pharmaceutical sector have been termed as 'pharmerging markets'. Apart from these E7 economies, many other emerging markets have been recognized as interesting destinations for the major global pharmaceutical players. Unlike the developed world, where health systems provide a more uniform coverage level, the emerging pharmaceutical markets have wide regional health expenditure differences within them. Moreover, recent major developments and global recession have driven disparate rates of evolution in each of these countries. Unlike the pharmaceutical market of United States and Western Europe, the emerging markets are characterized by diverse therapeutic segments, different and complex regulatory law and a fragmented market. The worldwide economic crisis has also added a new layer of complexity to the already challenging environment.

Thus, the need for action and informed direction has never been greater. Apart from the BRIC nations (Brazil, Russia, India and China), positive developments in other parts of the world are also reshaping the pharmaceutical sector. In regions such as Latin America and Asia, Eastern Europe and North Africa, a new set of emerging economies are now rapidly rising. A further 13 nations in these regions have now reached a threshold of economic development and volume of future growth that warrant close and immediate scrutiny. Collectively, the emerging markets undoubtedly offer high potential, with rising GDPs, expanding access to healthcare and an improving IP and regulatory environment in many cases. Nevertheless, these markets are fraught with uncertainty and hurdles. Local companies are strong and entrenched, domestic products well-established, and generics dominate the market in a growing number of countries. Patients invariably bear the highest share of healthcare spend, making issues of willingness and ability to pay key in these low income countries.

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