

# **Branded Generics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Drug Class (Alkylating Agents, Antimetabolites, Hormones, Anti – Hypertensive, Lipid Lowering Drugs, Antidepressants, Antipsychotics, Antiepileptics, Others), By Application (Oncology, Cardiovascular Diseases, Neurological Diseases, Acute & Chronic Pain, Gastrointestinal Diseases, Dermatological Diseases, Others), By Distribution Channel (Hospital Pharmacy, Retail Pharmacy, Online Pharmacy), By Region, By Competition**

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## **Abstracts**

The Global Branded Generics Market achieved a valuation of USD 230.02 Billion in 2022, and it is poised for remarkable growth in the forecast period, with an expected Compound Annual Growth Rate (CAGR) of 6.25% through 2028 and expected to reach USD 333.20 Billion in 2028. Branded generics, which are pharmaceutical drugs re-released under different brand names, have seen increased adoption. These medicines are reintroduced at a lower cost, and while the shape, size, color, and flavor may vary, the medication's core remains the same. This happens when the patent for the drug has expired. Branded generics encompass drugs used to treat various conditions like hypertension, diabetes, back pain, thyroid issues, and arthritis. They offer cost-effective alternatives to stay competitive in the market while maintaining the same level of quality and therapeutic effectiveness.

### **Key Market Drivers**

1. **Rising Patent Expirations:** As the patents of branded drugs expire, generic drug manufacturers gain the legal right to enter the market with their versions. This competition often leads to lower drug prices, making healthcare more affordable for consumers. Moreover, it enables wider access to essential medications, particularly in regions where cost was a barrier, thereby expanding the market. Branded generics are typically priced lower than their branded counterparts, which can yield significant savings for healthcare systems, especially in developing countries or regions with constrained healthcare budgets. Governments and healthcare providers may prefer to prescribe and procure branded generics, further driving market growth. Multiple generic manufacturers entering the market after a patent expiration fosters increased competition. This competition can fuel innovation in terms of formulation, delivery methods, and packaging as manufacturers strive to differentiate their products to gain a larger market share. In some cases, the introduction of numerous generic versions of a drug post-patent expiry can lead to market saturation. Consequently, generic drug prices can significantly decrease due to intense competition, which limits the revenue potential for generic manufacturers but benefits consumers and healthcare systems. The heightened competition in the generic market can incentivize manufacturers to invest in research and development to improve the quality, efficacy, and safety of their generic products. This focus on innovation can further drive the growth of the branded generics market.

2. **Growing Acceptance by Physicians and Patients:** Physician endorsement of branded generics plays a pivotal role in their market growth. When physicians have confidence in the quality and effectiveness of branded generics, they are more inclined to prescribe them to their patients. Physician recommendations and trust in the efficacy of branded generics can alleviate patient concerns about switching from branded drugs to their generic counterparts. Physicians often consider the financial burden on their patients when prescribing medications. If physicians believe that branded generics offer similar therapeutic benefits to branded drugs, they may be more likely to prescribe them to help patients save on healthcare costs. Pharmaceutical companies and healthcare institutions can contribute to educating physicians about the quality, safety, and equivalence of branded generics compared to branded drugs. Proper education can positively influence physicians' acceptance and prescribing habits. Patients may be hesitant about transitioning from well-known branded medications to generic versions. Positive experiences and successful treatment outcomes with branded generics can build patients' confidence in their effectiveness, leading to increased acceptance. Patients often trust their physicians' recommendations. If physicians explain the advantages of branded generics, including their affordability and equivalent therapeutic

effects, patients are more likely to accept them. Cost considerations significantly drive patient acceptance. Patients unable to afford expensive branded medications may be more open to using branded generics as long as they are assured of their safety and efficacy.

**3. Rising Incidence of Chronic Diseases:** The increasing global incidence of chronic diseases has generated a growing demand for medications to manage these conditions. Branded generics offer cost-effective alternatives to branded drugs, making them more accessible to a larger population of patients requiring continuous treatment. Chronic diseases often necessitate long-term medication regimens, which can become financially burdensome for patients. Branded generics, being more affordable than their branded counterparts, are a viable option for patients looking to manage their conditions without straining their finances. Governments and healthcare systems face pressure to provide affordable and sustainable healthcare services, especially for managing chronic diseases. Branded generics help healthcare systems manage their budgets more efficiently by offering cost-effective treatment options. The demand for medications to manage chronic diseases creates a competitive landscape for pharmaceutical companies. The expiration of patents for branded drugs used to manage chronic diseases opens up opportunities for generic manufacturers to enter the market with their branded generic versions. This competition can lead to innovation in formulations, delivery methods, and packaging, thereby enhancing the growth of the branded generics market. Chronic diseases affect populations worldwide, and the growth of the global branded generics market aligns with the need for accessible and affordable treatment options for chronic diseases in both developed and developing countries. Many chronic diseases are becoming increasingly prevalent in emerging markets due to lifestyle changes and aging populations. Branded generics address the demand for cost-effective treatments in these regions, driving market growth.

### Key Market Challenges

**1. Regulatory Hurdles:** Generic medications, including branded generics, must undergo regulatory approval processes to ensure their safety, quality, and efficacy. Delays or complexities in the approval process can slow down the introduction of new branded generic products to the market. Regulatory authorities often have strict requirements for demonstrating the bioequivalence of branded generics to their branded counterparts. Meeting these requirements can be challenging and time-consuming, potentially causing delays in market entry. Regulatory challenges can arise when dealing with the patents of the original branded drugs. Patent disputes and legal battles can delay or prevent the launch of branded generics even after the patent has expired. Different

countries have varying regulatory frameworks and requirements for generic medications. Navigating these diverse regulations can be complex for pharmaceutical companies looking to market branded generics globally. Ensuring consistent quality and adherence to manufacturing standards is crucial for the acceptance of generic medications. Regulatory hurdles related to quality control can affect the perception and trust of healthcare professionals and patients in branded generics. Some regulatory systems offer periods of data exclusivity or market exclusivity for innovator drugs, which can delay the entry of generic alternatives. This can hinder the availability of branded generics, especially in markets with longer exclusivity periods.

2. **Changing Healthcare Policies:** Governments often implement pricing regulations to control healthcare costs and ensure affordability for patients. While these regulations can lead to lower prices for medications, they can also impact the profitability of generic manufacturers, including those producing branded generics. If pricing regulations result in extremely low profit margins, manufacturers might be discouraged from producing or promoting branded generics. Reimbursement policies determine how much of the cost of a medication is covered by insurance or government healthcare programs. Changes in reimbursement policies, such as reduced reimbursement rates for branded generics, can influence patient access and demand for these products. Healthcare policies can influence the inclusion or exclusion of specific medications on formularies, which are lists of drugs covered by insurance plans or healthcare systems. If branded generics are excluded from formularies due to policy changes, it can limit their market reach and growth potential. Some healthcare policies and guidelines encourage the use of generic medications over branded drugs to reduce costs. While this can benefit the healthcare system and patients, it might impact the market potential for branded generics, which are positioned as a bridge between branded and generic drugs. Changes in intellectual property laws or policies related to market exclusivity can affect the competitive landscape for branded generics. If policies extend market exclusivity periods for branded drugs, it can delay the entry of generic alternatives, including branded generics. Changing policies related to parallel imports (importing and selling branded generics from lower-cost markets) can impact the availability and pricing of branded generics in certain regions. Healthcare policies that lack clarity or transparency can lead to confusion among patients and healthcare professionals. This confusion might

affect patient and physician acceptance of branded generics, hindering their market growth.

## Key Market Trends

1. **Advancements in Digital Health Integration:** The integration of digital health technologies can enhance patient engagement by offering tools for medication reminders, tracking, and adherence. Branded generics, being more affordable, can benefit from increased patient engagement, leading to improved treatment outcomes and patient loyalty. Branded generics are often used for managing chronic diseases, and digital health solutions enable remote monitoring of patients' health conditions, a valuable feature for chronic disease management. This integration can improve patient compliance with medication regimens, contributing to the growth of the branded generics market. Digital health platforms can facilitate telemedicine consultations, where physicians can remotely diagnose and prescribe medications, including branded generics. This can increase the accessibility of these medications to patients, especially in regions with limited healthcare infrastructure. Digital health solutions can enable personalized treatment plans based on patient data and health metrics, tailoring branded generics to individual patient needs, resulting in better treatment outcomes and patient satisfaction. Digital health integration can also improve awareness of branded generics among patients and healthcare providers. Manufacturers can use digital platforms to educate users about the benefits, availability, and cost savings associated with branded generics. Pharmaceutical companies can employ data analytics to gain insights into market trends, patient preferences, and healthcare utilization patterns, guiding marketing strategies and product positioning for branded generics.

2. **Development of Biosimilars in the Branded Generics Landscape:** Biosimilars compete with both original biologic drugs and branded generics in some cases. This competition can lead to lower prices, making treatment more affordable for patients and putting pressure on the pricing of branded generics, thereby increasing their adoption due to cost savings. Biosimilars can expand the market by providing more affordable options for patients who might have otherwise been unable to afford biologic treatments, benefiting branded generics by raising awareness and demand for cost-effective alternatives. Biosimilars can capture a portion of the market share of both original biologics and branded generics, potentially impacting the growth of the branded generics market depending on the competitive landscape. The introduction of biosimilars can lead to increased education efforts around biologics and their alternatives, which can benefit branded generics by creating a more informed market that understands the value of cost-effective options. Regulatory pathways developed for biosimilars can also impact regulations around generic medications, including branded generics. As patients become more familiar with biosimilars and their benefits, they might become more open to considering alternative treatment options, including branded generics. Patient preferences and acceptance can be influenced by the broader context of biosimilar adoption.



## Segmental Insights

**Drug Class Insights:** Within the Drug Class segment, the Anti-Hypertensive category is expected to witness substantial market growth throughout the forecast period. Several factors contribute to this growth, including the global prevalence of hypertension as a significant health concern affecting millions of individuals. Sedentary lifestyles and unhealthy diets have led to a continuous rise in hypertension cases. Branded generics offer an effective solution by providing affordable alternatives to branded anti-hypertensive drugs. Given that hypertension is a chronic condition often requiring lifelong medication, branded generics address the need for continuous treatment by offering cost-effective options. The high healthcare costs in North America have driven the demand for more affordable alternatives to branded drugs. Branded generics provide a cost-effective option for patients and healthcare systems, contributing to their growth in the region. Branded generics address the need for accessible medications, particularly for chronic diseases that are prevalent in North America. They help patients manage their conditions without the financial burden of expensive branded medications. The presence of health insurance systems in North America, including private insurance and government programs like Medicare and Medicaid, can encourage the use of more affordable branded generics by providing coverage for these medications.

**Distribution Channel Insights:** The Retail Pharmacy segment has been the dominant force in the market within the Distribution Channel category. Retail pharmacies play a crucial role in distributing medications, including branded generics, to patients. The availability of branded generics on pharmacy shelves makes them readily accessible to patients seeking affordable treatment options. Pharmacists at retail pharmacies provide patients with information about their medications, including branded generics. They can educate patients about the benefits, cost savings, and effectiveness of branded generics, influencing their perception and acceptance. Retail pharmacies often collaborate with insurance companies and healthcare systems to establish formularies, which are lists of approved medications. Including branded generics in these formularies can lead to increased prescriptions and market growth. Retail pharmacies are attuned to patients' financial constraints. By offering branded generics as more affordable alternatives, pharmacies contribute to patient access and adherence to medications. In emerging markets with a significant retail pharmacy presence, branded generics can become essential for providing affordable treatment options to large populations.

**Regional Insights:** North America, specifically the Branded Generics Market, dominated

the market in 2022. North America has seen a significant number of patent expirations for blockbuster drugs, creating opportunities for generic manufacturers to introduce branded generic versions. As a result, the region has experienced substantial growth in the branded generics market as companies capitalize on these opportunities. The high healthcare costs in North America have driven the demand for more affordable alternatives to branded drugs. Branded generics provide a cost-effective option for patients and healthcare systems, contributing to their growth in the region. Branded generics address the need for accessible medications, particularly for chronic diseases that are prevalent in North America. They help patients manage their conditions without the financial burden of expensive branded medications. The presence of health insurance systems in North America, including private insurance and government programs like Medicare and Medicaid, can encourage the use of more affordable branded generics by providing coverage for these medications.

### Key Market Players

Teva Pharmaceutical Industries Ltd.

Lupin Pharmaceuticals Inc.

Sanofi-Aventis.

Sun Pharmaceutical Industries Inc.

Dr Reddy's Laboratories Inc.

Endo International PLC.

GlaxoSmithKline LLC.

Pfizer Inc.

Viartis Inc.

Apotex Inc.

### Report Scope:

In this report, the Global Branded Generics Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Branded Generics Market, By Drug Class:

Alkylating Agents

Antimetabolites, Hormones

Anti – Hypertensive

Lipid Lowering Drugs

Antidepressants

Antipsychotics

Antiepileptics

Others

Branded Generics Market, By Application:

Oncology

Cardiovascular Diseases

Neurological Diseases

Acute & Chronic Pain

Gastrointestinal Diseases

Dermatological Diseases

Others

Branded Generics Market, By Distribution Channel:



Hospital Pharmacy

Retail Pharmacy

Online Pharmacy

Branded Generics Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Branded Generics Market.

Available Customizations:

Global Branded Generics market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).



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