

Vietnam Pharmaceutical Report Q2/2016

<https://marketpublishers.com/r/V56E89575B5EN.html>

Date: May 2016

Pages: 109

Price: US\$ 2,495.00 (Single User License)

ID: V56E89575B5EN

Abstracts

With 178 drug manufacturers Vietnam pharmaceutical products mostly focus on simple dosage forms and generic form with lower values and overlapping, and completely lack effective drugs with complicated preparation. On the other hand, there are a huge number of companies in generic drugs market, which is very small, then leading to decrease in profits. Vietnam Pharmaceutical industry uses about 60,000 tons of medicines, of which about 80-90% is imported. The ratio of research & development expense to revenue at domestic companies is just about 5%.

In 2015, according to Vietnam Industry Research and Consultant (VIRAC) estimation, Pharmaceutical industry value is expected to reach US\$4.2bn. Although pharmaceutical spending per capita in 2015, according to VIRAC's estimation, is US\$38. The growth of the prescription drug market will exceed the growth rate of Over-the-counter (OTC) market.

The market value of patented drugs in Vietnam tends to increase gradually. Pharmaceutical imports in 2015 reached US\$2.3bn, mainly from France (US\$275m) and India US\$267m).

Pharmaceutical exports in Vietnam reached relatively low rate of 5% of the import value and 2.5% of the industry consumption value. The biggest wholesale market systems in Vietnam pharmaceutical distribution in Ho Chi Minh City and Hanoi. Pharmaceutical products are necessities, thus, economic growth virtually has hardly any impact on the industry growth rate. Some main industry driving forces are the protection from state.

To compromise WTO agendas, Vietnam has to gradually open the pharmaceutical market by allowing foreign firms to built plants and distribution network in Vietnam. With higher level of opening after the TPP, domestic pharmaceutical companies will face the threat of more competition from FDI ones.

Vietnam Pharmaceutical industry is forecast to continue the double-digit growth. Most of the enterprises of pharmaceutical industry maintained positive operation with high levels of gross profit and net profit in the period 2014-2015. In addition, raising awareness of consumers on health issues and initiative in healthcare also contributed greatly to industry development. With higher disposable incomes, consumers seem to be more interested in vitamins and supplements to diets.

The in-depth research “Vietnam Pharmaceutical Industry” carried out by Vietnam Industry Research and Consultant (VIRAC) illustrates the overall scenario of the pharmaceutical industry in Vietnam in order to provide an insight for a better understanding regarding the market. The report details the economic situation in general and the industry in particular with updated date and statistic until 2017, the movement of the price as well as the forecast for the upcoming future, covering all domains. Analysis of big players in the industry is also elaborated by providing detailed financial analysis, applied technology, market share, etc. herein to help companies position and define the competitiveness in the market. For example, some typical producers are DHG Pharma JSC, Imexpharm Pharma JSC, Domesco Medical Import Export JSC, TRAPHACO JSC, S.P.M JSC.

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