



**BMI**

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# Pharmaceuticals

Industry Research

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# Welcome to BMI's Pharmaceuticals Service

Our in-depth forecasts and analysis are designed to help you navigate risks, identify business opportunities and make better strategic decisions, particularly in emerging and frontier markets. Whether you're from a drug company, healthcare organisation, medical company, industry association, consultancy, financial institution or government, our dedicated analysts monitor and summarise the latest developments, providing you with in-depth regulatory and strategic analysis to help you assess the competitive landscape and understand market dynamics.

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# Pharmaceuticals Quarterly Reports

BMI's very latest independent assessment of conditions, opportunities and emerging trends across 110 pharmaceuticals markets.

## BMI's Expert Industry View

An at-a-glance perspective on the latest regulatory developments, key forecast indicators and major corporate developments, covering the prescription, OTC and generics markets. The pharmaceuticals SWOT outlines strategic factors that affect the basic assumptions underpinning BMI's forecast analysis and gives a complete overview of market climate.

## BMI's Industry Forecasts

Ten year forecasts for all key indicators, supported by explicit assumptions, plus analysis of key upside and downside risks to the main forecasts:

- **Pharmaceutical market:** Drug expenditure in USDbn and in local currency terms, % of GDP and per capita (USD).
- **Patented drug market:** Prescription drug sales in USDbn and in local currency terms, (% of total sales).
- **Generic drug market:** Generic product sales in USDbn and in local currency terms, generic sales (% of total sales).
- **OTC drug market:** OTC sales in USDbn and in local currency terms, (% of total sales).

## BMI's Pharmaceuticals Risk/Reward Index

BMI's Risk/Reward Index provides investors (both national and multinational) looking for opportunities in the region with a clear country-comparative assessment of the market's risks and potential rewards. Each of the 110 country markets are scored using a sophisticated model that includes more than 40 industry, economic and demographic data points to provide indices of highest to lowest appeal to investors, with each position explained.

## Market Overview

A snapshot of key market characteristics, including total size of the pharmaceuticals segments, growth drivers, leading therapeutic areas and the competitive landscape.

## Regulatory Review

Details of the industry regulatory framework and key legislation covering the licensing of new products/services, pricing and reimbursements, intellectual property, taxation and advertising, as well as analysis of the overall regulatory burden.

## Competitive Landscape

The competitive landscape section provides comparative analysis of the major pharmaceutical companies operating in each market.

## Detailed Company Profiles\*

Examines the competitive positioning and short- to medium term business strategies of key industry players. Strategy is examined within the context of BMI's industry forecasts, our macroeconomic views and our understanding of the wider competitive landscape to generate Company SWOT analyses. The latest financial and operating statistics and key company developments are also incorporated within the company profiles, enabling a full evaluation of recent company performance and future growth prospects.

**See page 4 for a full list of countries covered**

\*Company profiles are not available for every country. Those reports instead contain information on the current activities of prominent companies operating in the market.

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# Quarterly Reports Country Coverage Matrix

AFRICA	
Algeria	•
Angola	•
Botswana	•
Cameroon	•
Cote d'Ivoire	•
Egypt	•
Ethiopia	•
Gabon	▲
Ghana	•
Kenya	•
Mauritius	•
Morocco	•
Mozambique	▲
Namibia	•
Nigeria	•
South Africa	•
Sudan and South Sudan	•
Tanzania	•
Tunisia	•
Uganda	•
Zambia	•
Zimbabwe	▲
AMERICAS	
Argentina	•
Brazil	•
Canada	•
Chile	•
Colombia	•
Costa Rica	•
Cuba	▲
Ecuador	•
El Salvador	▲
Guatemala	▲
Honduras	•
Mexico	•
Nicaragua	▲
Panama	•
Peru	•
Puerto Rico	▲
United States	•
Venezuela	•
ASIA	
Australia	•
Bangladesh	•
Cambodia	•
China	•
Hong Kong, China	•
India	•
Indonesia	•
Japan	•
Laos	•
Malaysia	•
Myanmar	•
New Zealand	•
Pakistan	•
Philippines	•
Singapore	•
South Korea	•
Sri Lanka	•
Taiwan, China	•
Thailand	•
Vietnam	•
MIDDLE EAST & NORTH AFRICA	
Algeria	•
Bahrain	•
Egypt	•
Iran	•
Iraq	•
Israel	•
Jordan	•
Kuwait	•
Lebanon	•
Morocco	•
Oman	•
Qatar	•
Saudi Arabia	•
Tunisia	•
United Arab Emirates	•
REGIONAL & GLOBAL	
Asia	•
Europe	•
Latin America	•
Middle East & North Africa	•
Sub-Saharan Africa	•
EUROPE	
Armenia	▲
Austria	•
Azerbaijan	•
Belarus	•
Belgium	•
Bulgaria	•
Croatia	•
Czech Republic	•
Denmark	•
Estonia	▲
Finland	•
France	•
Georgia	•
Germany	•
Greece	•
Hungary	•
Ireland	•
Italy	•
Kazakhstan	•
Kyrgyzstan	•
Latvia	▲
Lithuania	▲
Moldova	▲
Netherlands	•
Norway	•
Poland	•
Portugal	•
Romania	•
Russia	•
Serbia	•
Slovakia	•
Slovenia	▲
Spain	•
Sweden	•
Switzerland	•
Turkiye	•
Ukraine	▲
United Kingdom	•
Uzbekistan	•

• Includes 3 quarterly updates  
▲ Annual Datapacks



# Innovative Pharmaceuticals Risk/Reward Index

Our Innovative Pharmaceuticals Risk/Reward Index (RRI) quantifies and ranks a market's attractiveness in terms of its pharmaceuticals market; it balances the **Risks** and **Rewards** of launching innovative medicines in different countries.

To form a country's RRI score, we combine industry-specific characteristics with broader economic, political and operational market characteristics. We weigh these inputs in terms of their importance to investor decision making in the pharmaceutical industry. The result is a nuanced and accurate reflection of the realities facing investors in terms of the balance between: 1) opportunities and risk; and 2) sectorspecific and broader market traits. This enables users of our RRI to assess a market's attractiveness in both a regional and global context.

The RRI also encompasses a combination of our proprietary forecasts and analyst assessment of the regulatory climate, as well as globally acceptable benchmark indicators (eg, Transparency International's Corruption Perceptions Index). As regulations evolve and forecasts change, so does the RRI score, providing a highly dynamic and forward-looking result.

The Innovative Pharmaceuticals Risk/Reward Index universe comprises **110 countries**.

## Benefits of Using BMI's Innovative Pharmaceuticals RRI

- **Global Rankings:** One global table, ranking all the markets in BMI's universe for the launch of innovative pharmaceuticals from most attractive to most risk.
- **Accessibility:** Easily accessible, top down view of global, regional or sub-regional Risk/Reward profiles.
- **Comparability:** Identical methodology across 110 countries allows users to build lists of countries they wish to compare, beyond the confines of a global or regional grouping.
- **Scoring:** Scores out of 100 with a wide distribution, provide nuanced investment comparisons. The higher the score, the more favourable the country profile.
- **Quantifiable:** Quantifies the Risks and Rewards of doing business in the innovative pharmaceuticals sector in different countries around the world and helps identify specific flashpoints in the overall business environment.
- **Comprehensive:** Comprehensive set of indicators, assessing industry-specific risks and rewards alongside political, economic and operational risks.
- **Entry Point:** A starting point to assess the outlook for the innovative pharmaceuticals sector, from which users can dive into more granular forecasts and analysis to gain a deeper understanding of the market.
- **Balanced:** Multi-indicator structure prevents outliers and extremes from distorting final scores and rankings.
- **Methodology:** The Index is created using a combination of proprietary BMI forecasts, analyst insights and globally acceptable benchmark indicators.



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# Pharmaceutical Manufacturing Key Projects Data

BMI's Pharmaceutical Manufacturing Key Projects Data provides a comprehensive catalogue of 3,400 manufacturing facilities globally operated by 133 leading pharmaceutical and medical device companies.

Our experts collate and standardise information covering thousands of pharmaceutical manufacturing projects into an accessible format that will enable you to:



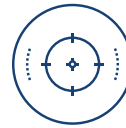
## Identify Trends

Assess key pharmaceutical manufacturing sector trends on a global, regional and country level.



## Drive Business Development

Identify potential clients and commercial opportunities such as new projects or project expansions.



## Track Competitor Activity

Monitor where your competitors are operating and identify potential market opportunities.



## Assess Risks

Evaluate potential risks and plan strategically by understanding operational status and project types of facilities worldwide.

## An Interactive Online Tool

The database is an interactive online tool, with functionality that allows you to search via country and type of manufacturing facility. The database displays information across a multitude of fields which can be quickly filtered to monitor over 3,400 pharmaceutical projects globally. All Pharmaceutical Manufacturing Key Projects Data can be seamlessly exported into Excel for additional insights, allowing you to perform further analysis or easily integrate data into your existing workflows.

Project ID	Project Name	Company Name	Parent/Subsidiary	Parent Company	Companies Involved	Country	Main Sector	Sub Sector	Status	Status Notes	Contract Manufacture
phama_18	Abbott Barceloneta	Abbott Laboratories...	Parent	Abbott Laboratories...	Abbott Laboratories...	Puerto Rico	Medical Devices	Cardiovascular	Operational	Site manufactures v...	No
phama_48	Abbott Huechuraba	Abbott Laboratories...	Subsidiary	Abbott Laboratories...	Abbott Laboratories...	Chile	Pharmaceuticals	Finished Dose Forms	Operational	Facility manufacture...	No
phama_22	Abbott Merio Park	Abbott Laboratories...	Parent	Abbott Laboratories...	-	United States	Medical Devices	Cardiovascular	Operational	Site manufactures c...	No
phama_30	Domeco Can Lo In...	Domeco Medical L...	Subsidiary	Abbott Laboratories...	Abbott Laboratories...	Vietnam	Pharmaceuticals	Finished Dose Forms	Operational	Site comprises of th...	Yes
phama_7	Menarini Adlershof	Berlin-Chemie AG (...)	Subsidiary	A.Menarini Industrie...	-	Germany	Pharmaceuticals	Finished Dose Forms	Operational	Site produces solid ...	No
phama_9	Menarini Barcelona	Laboratorios Menari...	Subsidiary	A.Menarini Industrie...	-	Spain	Pharmaceuticals	Finished Dose Forms	Operational	Facility manufacture...	No
phama_13	Menarini Florence O...	A.Menarini Industrie...	Parent	A.Menarini Industrie...	-	Italy	Pharmaceuticals	Finished Dose Forms	Under construction	The production plan...	No
phama_11	Menarini Guatemala	Latin Farma S.A. (Gu...	Subsidiary	A.Menarini Industrie...	A.Menarini Industrie...	Guatemala	Pharmaceuticals	Finished Dose Forms	Operational	Site manufactures o...	No



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# Strategic Reports

## Latest Advances in Treatments & Technology Reports

BMI's detailed analysis of how advances in technologies and treatments are progressing and in turn the impact they will have on global markets. Each report contains a comprehensive overview of each sector with details of the latest advances, market opportunities, company strategies and the impact of regulatory developments.

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Advances in the Orphan Drugs Market

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Advances in the Cancer Immunotherapy Market

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Advances in the Biosimilars Market

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## Pricing & Reimbursement

This best-selling report will help you determine the likely commercial success of products in key countries across the globe. The report covers both developed and emerging markets, reviewing the various systems and procurement strategies employed in each market.

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Worldwide Guide to Pharmaceutical Pricing & Reimbursement

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## World Pharmaceutical Markets Reports

Detailed insight into world markets for OTC, prescription and generic drugs. Each report takes a look at growth markets, operating environments and the major players in each market.

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World OTC Medicine Market

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World Prescription Medicine Market

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World Generic Drug Market

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## Quarterly Pharmaceuticals Round Up

The Round-Up is a great way to keep abreast of developments across global pharmaceutical markets, with latest growth forecasts, spotlight on the convergence between emerging markets and developed markets and analysis of the increasing impact of macroeconomics and politics.

# Pharmaceuticals Factbook and Forecasts

## Factbook

Our Pharmaceuticals Factbook includes comprehensive coverage of 75 country markets around the world. With 5 years worth of data the Factbook provides trend analysis and looks at market value at a world, regional and country level, including healthcare infrastructure data, GDP & healthcare spending and key demographic trends.

Over 25,000 data points at your fingertips – providing:

- Key economic, demographic and health statistics on 75 markets around the world
- Five years of historical data for markets, GDP & healthcare spending, demographics and healthcare statistics
- World/regional overviews plus statistics on individual countries
- Over 700 tables and charts delivered in a single PDF report

## Forecasts

Our Forecasts for Pharmaceuticals cover country markets and all key product areas to ensure you have the latest global, regional and national forecasts. The Forecasts contain:

- Five year growth forecasts for 75 country markets.
- Comparative data on a regional and global basis.
- Rankings by indicators allowing 'at a glance' benchmarking of countries.
- Basic economic and demographic data by category (US\$ millions).
- Market by category per capita (US\$) and Market by category (% of total).

All data from both reports can be downloaded to excel or visualized using the Interactive Charts functionality in Fitch Connect.

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Worldwide Pharmaceutical Market Factbook

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Worldwide Pharmaceutical Market Forecasts

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# Pharmaceuticals Newsletters

A range of pharmaceuticals newsletters keeping you up to date with the latest trends and developments across the market.

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Anti-infective Drug News\*

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Autoimmune Drug Focus\*

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Biosimilars Business Review\*

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Cancer Drug News\*\*

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CNS Drug News†

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Key Pharma News†

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World Generic Markets†

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Americas Pharma & Healthcare Insight

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Asia Pacific Pharma & Healthcare Insight

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Emerging Europe Pharma & Healthcare Insight

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Middle East & Africa Pharma & Healthcare Insight

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Western Europe Pharma & Healthcare Insight

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\*\* Weekly Report

\* Quarterly Report

† Fortnightly Report

All other reports are produced Monthly.

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## About BMI

In an uncertain macroeconomic environment, BMI's systematic, independent and data-driven market insights, analysis and forecasts enable you to recognize and assess risks and opportunities across 200+ markets and 20+ industries. For more than 40 years, we have provided impartial and transparent analytics, data and research

across themes, countries and sectors, with deep insight into emerging markets. Our detailed intelligence is frequent, consistent and systematic, enabling you to easily make comparisons and interrogate data to support your strategic plans and investment decisions.

Learn more at [fitchsolutions.com/bmi](https://fitchsolutions.com/bmi)

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