

Terms of Reference

- **Overview of Russia's Pharma sector:**
 - General description- major Brands and Generic medicines.
 - Overview of medical equipments/devices industry
 - Major producers (indicating output volume, value, %, ownership);
 - Availability of raw materials in Russia (deposits, reserves, ownership);
 - Factors contributing to the growth of Pharma sector of Russia

- **Structure of the Pharma industry (with charts and tables):**
 - Market size (over past 5 years)
 - Total demand of Pharma products in Russia (over the past 5 years, value, volume, category of Pharma products);
 - Share of domestic production, imports and exports (% , value, volume; over past 5 years);
 - Share of state procurement/private sector (percentage, value, volume; over past 5 years);
 - industry-wise consumption highlighting the main consumers of Pharma products (percentage, value, volume; over past 5 years);
 - Identification of the top buyers/retailers, industry associations and groups including key influencers;
 - Pricing structure and distribution pattern.

- **Detailed analysis of Russia's imports (with charts and tables)**
 - General trend- Pre Covid phase (April 2018-March 2020), Covid phase (April 2020- February 2022) and post western sanctions (March 2022- Current)
 - Top-10 items of import and top10 importers of these items (4 or 6 digit HS-Code, its value, volume, percentage);
 - Top-10 countries exporting to Russia (value, volume, percentage)
 - Top-10 importing companies (indicating items of import, volume, value, exporting country, and brief description of the company);
 - Logistics: main points (ports) of entry, means of transportation, companies involved;
 - For all the above – India's position with same indicators.

- **Focus on Effect of Western sanctions on the Russian pharma industry**
 - Overview of pharmaceutical industry of Russia post February 2022
 - Impact of Sanctions on the pharmaceutical supply chain
 - Adaptations and strategies adopted by the Russian pharmaceutical sector. (with a special focus on Localisation)

- **Analysis of Russian Pharma import market space**
 - Analysis of trends showing the decline of India's share in the Russian pharmaceutical market (including estimations for medical equipment industry) .
 - Factors contributing to this decline.
 - Analysis of strategies and products contributing to the success of other countries whose market share is increasing.

- **Regulations and barriers**
 - Customs procedures in Russia: general overview, import duties, points of entry, relevant rules and regulations with brief description.
 - Customs procedures in Eurasian Economic Union (EAEU) and the latest developments.
 - Laws and regulations associated with the sector
 - Government agencies involved with area of their responsibility
 - Barriers to entry of India in the market (tariff/non-tariff)

- **Opportunities for India:**
 - Details of Indian pharma companies operating in Russia along with the business models adopted.
 - Estimation of potential of India-Russia trade in the sector – including medical devices (potential items of trade, volume, value, competitors, perspectives);
 - Potential Russian partners for India in both Pharma products and medical devices category,
 - Regional analysis- which regions offer greater opportunities for Indian companies
 - Strategic recommendations for Indian exporters to enhance their market presence in Russia.
 - Policy recommendations for Indian and Russian governments to facilitate trade.

- Future outlook of the Russian pharmaceutical sector and opportunities for collaborations.
- **Enclosures in the report may contain:**
 - Details of major government entities dealing with Pharma sector in Russia;
 - List of major associations in the sector (brief description, contact details);
 - List of major Russian manufacturers (brief description, contact details);
 - List of major World manufacturers (brief description, position on the Russian market);
 - List of major importing companies, Russian/foreign (brief description, contact details)
 - Laws and regulations;
 - List of major exhibitions/events in Russia in the sector (including medical devices)
- An executive summary of the report (this must cover all salient findings of the report)
- The sources of information used for the study are to be indicated
- The study will be the property of the Government of India, and logos, and/or other identification symbols of the company performing the study should not be used.
- Upon completion of the study 2 hard copies and a soft copy in pdf and word format are to be handed over in both English and Russian.