



TODAY'S HISTORY OF THE FUTURE

 Association of International Pharmaceutical Manufacturers
Ассоциация международных фармацевтических производителей

20 years for better health and life in Russia
лет на благо улучшения здоровья и жизни россиян

20 YEARS AGO WE DECIDED TO GET TOGETHER AT THE MOMENT WHEN THE NEW PHARMACEUTICAL MARKET, THE PHARMACEUTICAL MARKET OF MODERN RUSSIA, WAS DEVELOPING. THUS OUR ASSOCIATION, WHICH DEVELOPED TOGETHER WITH THE MARKET AND BECAME ITS INTEGRAL PART, WAS BORN.

«Health is human's greatest wealth», – said the famous Hippocrates.

«Health costs more than gold», – wrote Shakespeare. «Health outweighs all other blessings so much that a healthy beggar is happier than an ailing king», – noted Schopenhauer.

It can hardly be disputed.

Being international manufacturers of medicine products, we understand this better than anyone else, since we have been working for many years for the sake of the health of every person in the world. Many companies came to Russia long ago; some of us have been here since the beginning of the previous century. But 20 years ago we decided to get together at the moment when the new pharmaceutical market, the pharmaceutical market of modern Russia, was developing. Thus our Association, which developed together with the market and became its integral part, was born. I believe I have the right to speak about this story of simultaneous development since I have been working in this field for 17 years in Janssen, a pharmaceutical companies of Johnson & Johnson.

AIPM is not just an abbreviation of four letters of the English alphabet. There is more behind it – there are 20 years of work in Russia. They are 20 years of work for the benefit of patients' health and wellbeing, 20 years of investments in modernization of the Russian healthcare system. Lastly, they are 20 years of contribution to the development of the industry. But this is just the beginning, the beginning of a new future.

During these years AIPM has been devoted to patients' interests as its main aim, striving to provide them with access to breakthrough therapies. The contribution of our industry to the

development and welfare of society cannot be underestimated. In the last 20 years a lot has changed: the global pharmaceutical industry managed to considerably increase patients' life expectancy as well as their quality of life. According to the World Health Organization, in the last 10 years life expectancy in the world increased by four years. During the same period in Russia the crude mortality rate decreased by 15% from 15.6 to 13.5 deaths per 1000 people.

Could anyone in the 1990s have imagined that some oncological diseases would not be a death sentence for the patient? Today there are drugs at doctors' disposal that can turn cancer into a chronic condition. Furthermore, there are medicines that act specifically on the malignant cell, not affecting the whole body or lowering the quality of the patient's life. Although oncology is a field where much more must be accomplished, progress is evident and patients' hope grows every year. Thanks to achievements of global science as well as to early detection, today's breast cancer 5-year survival rate has reached 89.2%, and in some types of skin cancer it is 97%.

10 years ago AIDS was synonymous with death. Today the life expectancy of every patient receiving modern drug therapy is comparable to that of a healthy person. We keep working on increasing patients' quality of life and ensuring convenience of the therapy. Very soon patients will be able to live a full life receiving an injection of an innovative drug just once a month.

Of course, these results are not easy to achieve. They are backed by years of work by the best scientists, using cutting-edge approaches to research and development, and also considerable investments by pharmaceutical companies. Thus, last year

in Europe alone pharmaceutical companies invested about 300 billion euros in new research. The industry employed 700,000 scientists to focus on the creation of new drugs and therapeutic approaches. It is no secret that the pharmaceutical industry is one of the most capital-intensive and also innovative industries. The pharmaceutical R&D industry received the highest level of economic investments even during the economic and financial crises. Annual contributions to research and development in our industry are five times higher than in the aerospace and defense industries, 3.75 times higher than in the chemical industry and 2.5 times higher than in the IT industry. Some of AIPM's members are listed in the annual Forbes TOP100 most innovative companies.

Russia has huge potential in the development of the pharmaceutical industry, both in providing people with modern drugs and in achieving an economic effect related to attracting investments and hi-tech development. Without a doubt, in the last decade our country achieved significant success in healthcare advancement. Russia is becoming a full-fledged player in the global pharmaceutical market. This was possible mainly due to government programs aimed at increasing the efficiency of the healthcare system, development of the local pharmaceutical industry and medical science. The international pharmaceutical industry takes an active part in their realization. We have already significantly exceeded the amount of \$1 billion that we intended to invest into the Russian economy some time ago.

At present, international pharmaceutical companies have already invested about 1.5 billion euros in the development of the Russian market. Today AIPM member

companies have nearly 19,000 employees, and more than 3,000 jobs were created as part of localization projects.

As a result, several advanced factories are already operating in Russia, with more facilities planned, modern research centers are being created, transfer of innovative technologies for drug development and production is ongoing, and thousands of educational programs for doctors all over the country are being implemented. We are contributing to increasing employment, replenishing the state budget by paying taxes, and creating demand for related sectors that supports the general economic growth of the country.

AIPM member companies started this work a few years ago and we are going to continue it because it allows modern therapies to be made accessible for Russian patients. This is one of the main goals set by the Association.

When AIPM was born 20 years ago we were focused on solving operational issues and did not really think about the future of this professional association. At that time it was more of a small «interest group» to discuss with colleagues some immediate problems such as how to import a drug, how to receive customs clearance, and other current issues. However, the market grew and developed, and so did our Association. Now I am proud to say that AIPM has become one of the most important expert organizations.

Today AIPM consists of 57 international companies comprising over 80% of the world pharmaceutical manufacture and over 60% of the drugs imported into the Russian Federation. It is hard to remember any specific event without representatives of the Association taking part. Our opinion and global multi-year experience

is highly respected, we collaborate with government authorities, market regulators, and Russian colleagues to identify current problems and find solutions for the Russian healthcare system. We are involved in discussing draft legislation and sharing best global practices regarding industry regulation. For instance, important expert work on harmonizing legislation on drug circulation in the country is underway right now, as well as efforts to search for the most effective model of drug provision for pilot implementation in several Russian regions, and much more.

I can state with confidence that AIPM is a long-term and reliable partner for the Russian state in the field of healthcare modernization. We support, share, and contribute to achieving objectives in the field of drug provision for Russian citizens. We make a significant contribution to the modernization and setup of pharmaceutical production in Russia and implement a number of educational initiatives aimed at increasing the professional expertise of healthcare specialists. We are really proud of this.

At the same time, much more remains to be done. In the global healthcare system there are still many unmet needs, such as, for instance, Alzheimer's disease, oncology, orphan diseases as well as new infectious and viral diseases. We are trying to find the best ways to solve them. It is of great importance for the whole society because healthy people can contribute more to its development.

In spite of the considerable progress the Association has made in combating serious diseases, the professional community sometimes thinks that our work is not transparent enough and our actions are not completely clear. We understand

this point of view, which stimulates us to further develop, improve, and contribute to the industry's growth.

Today pharmaceutical companies all over the world tend to do business as transparently as possible. Russia is not an exception. We strive to make our interactions with healthcare professionals even more open; we are doing our best to extend the range of scientific usage of our clinical studies data. We are discussing real world data and issues of dividing responsibility and costs in case any of our products does not have the necessary therapeutic effect on a certain patient. These are only some of the examples.

Of course we cannot avoid mentioning today's high level of geopolitical risks, which obviously influences many sectors of the Russian economy. At the same time we consider it completely unacceptable to speculate on the subject of sanctions or other restrictive measures in the field of healthcare. You cannot forget that millions of lives depend on the work of international pharmaceutical companies and human health simply cannot be the subject of geopolitical bartering. Certainly, we are going to continue working on the projects started in Russia for the sake of Russian patients. Together we overcame the crises in 1998 and 2008. We will survive these hard times because we are here for the long haul.

I would like to thank all of our partners and colleagues who have been with AIPM for many years. I want to thank the AIPM team; who bring many of the Association's initiatives to life. I am confident that together we will manage to make our industry more innovative and open, an industry that could be a good example for others to follow.

Congratulations, dear colleagues!



Naira ADAMIAN,
Chairman of AIPM Board of Directors,
Managing Director of Janssen,
Pharmaceutical Companies
of Johnson & Johnson,
General Director
of LLC Johnson & Johnson

AIPM: ROLE IN SHAPING THE RUSSIAN PHARMACEUTICAL MARKET



The Association of International Pharmaceutical Manufacturers (AIPM) was established in 1994. Today it is the leading professional association on the Russian pharmaceutical market. AIPM comprises more than 55 large companies that produce about 80% of the world's pharmaceutical products and over 60% of medicines imported into Russia. Its members are both Russian and foreign pharmaceutical manufacturers. The Association is a member of respected Russian and international organizations, such as the Russian Union of Industrialists and Entrepreneurs (RSPP), the International Federation of Pharmaceutical Manufacturers & Associations (IFPMA), the European Federation of Pharmaceutical Industries and Associations (EFPIA), the Association of the European Self-Medication Industry (AESGP). According to The Financial Times, 14 AIPM member companies are in the TOP100 global enterprises in 2014.

It is indisputable that the base of stable development of pharmaceutical market in Russia is a predictable regulation policy in the field of healthcare. In this regard AIPM facilitates the development of the civilized pharmaceutical market, expansion of the assortment of modern medicines and, eventually an increase in the level of healthcare in Russia for the benefit of the population of our country.

This philosophy determines a serious approach of the Association members to all the aspects of its activity, from quality and safety control at the stage of drug development and manufacture to additional voluntary obligations, such as numerous projects on corporate social responsibility, implemented both globally and locally.

According to AIPM Statutes, membership in the Association is open for pharmaceutical manufacturing companies if they adhere to two basic principles of the Association: innovation support on the basis of effective and transparent legislation regarding protection of intellectual property rights, and meeting ethical standards as set out in the AIPM Code of Practice. The Association is governed by the General Meeting

of AIPM members, the Board of Directors and the Secretariat. Key decisions on principal directions of the Association's activity are made by the General Meeting in accordance with established voting procedure.

The 20-year AIPM work in Russia is closely connected to the main stages in the development of the Russian pharmaceutical market. The role of member companies of the Association in this process can without exaggeration be considered crucial. Before 1994 when the AIPM was established there was no Russian pharmaceutical market in the modern sense of the term. AIPM became the first in the industry and one of the first professional associations in the new Russia. Serious problems of that period were related to the access to modern effective high quality and safe medicines for the Russian people, when in other countries these medicines were already being used in therapy. Moreover, breaking of economic ties during the times of political change resulted in loss of access even to the medicines which had previously been imported to Russia.

The market was needed to be developed anew. The first decade of its development was an important stage with regard to increasing the volume of imported drugs, including within state-run programs, as well as increasing the number of offices of pharmaceutical manufacturing companies and defining market conditions. After overcoming the crisis of 1998 which was a real challenge for the young market, the global pharmaceutical industry managed to supply Russian citizens with a wide range of modern medicines.

The regulatory framework for the industry was created almost from nothing, as the legislation Russia had inherited from the USSR made virtually no provision for drug circulation. Due to a lack of experience in law creation and enforcement in this socially important sector, the government authorities had to grapple virtually in the dark for the right way, which meant that rules of the game changed constantly. Under the circumstances the support by AIPM was invaluable because of its global experience in the pharmaceutical industry. The Association not only defended



AIPM: ROLE IN SHAPING THE RUSSIAN PHARMACEUTICAL MARKET



the industry's interests, but consistently facilitated implementation of international standards of manufacturing, quality control and management.

Following high ethical standards is one of essential acting principles of the Association's member companies. They were set down in the AIPM Code of Practice back in 1998. Both then and now the restrictions of the Code are more detailed and strict than legal requirements of the Russian Federation. The common style of leading companies in the pharmaceutical industry who are members of AIPM is to take more responsibility than is required by law and to consider tomorrow's needs in today's work. This approach is used to produce modern, safe, high-quality drugs, which are a special type of good regulated by specific legislation and requiring the attention of professionals and customer care like no other. The Code pays attention to all the aspects of drug circulation. The rules of postregional clinical and marketing studies are defined. Principles of interaction between pharmaceutical manufacturing companies and doctors and patient organizations, pharmacy sector representatives and government authorities are also described in the Code.

The Code includes provisions on the necessity of supplying truthful information about the drug, which must be clearly identified as a pharmaceutical product. In this regard OTC drugs advertising is considered as an important economic and social instrument as per the concept of «responsible self-medication» developed by the World Health Organization (WHO).

Symbolically, the 20th anniversary of AIPM in Russia coincides with the introduction of the legislative norm establishing the obligatory GMP (Good Manufacturing Practice) standards for all pharmaceutical manufacturers starting 1st January 2014. Among other goals, AIPM promotes best global practices and collaboration for harmonization, and it was AIPM that provided the regulators with original translation of GMP regulations adopted in developed countries that later became the basis for the Russian GMP rules.

Investment projects of the companies – members of the Association were actually initiated before the National program of development of the pharmaceutical and medical industry up to 2020 and led to intense localization processes in the industry.

During the last five years the leading global companies – members of AIPM were continually initiating localization projects in Russia with investments twice as big as the promised «golden billion» – the amount of \$1 billion will be invested in the Russian economy by AIPM members, earlier than the National program was approved in February 2011. A few years later the Association proved its words were true by real deeds.

While expanding activity in Russia the companies – members of the Association practice various types of localization. It includes building factories and organizing green field pharmaceutical manufacturing, buying factories for further modernization, transferring technologies to Russian partners, including know-how of full cycle production and intellectual property rights.

Today in Russia several dozen of localization projects are under active investing.

Furthermore, the capital investments in the amount of \$2 billion lead to secondary investments due to the load of created capacities. In parallel with investment of financial resources the Russian pharmaceutical industry receives innovation technologies and qualified specialists. It should be noted that, on the average international pharmaceutical manufacturers spend about 10–15% of the income on research and development of new drugs.

During the years of AIPM activity more than 200 Russian scientific centers have been involved in joint research projects. Total number of people working for the companies – members of the Association is over 19,000 in different regions of Russia.

Using the 20-year experience of presence on the Russian pharmaceutical market and systematic vision of its prospects for further development AIPM is going to continue doing its best for better health and life in Russia.



KEY DATES AND TRENDS OF THE PHARMACEUTICAL MARKET IN RUSSIA

- ▶ **1994** – This year is considered as the birth year of the pharmaceutical market in Russia, AIPM was also established. In the past the state provided drugs to its citizens, the range in pharmacies was meager and import was represented by generics («branded generics») mainly from the countries of Comecon (The Council for Mutual Economic Assistance). The decision of leading international companies to unite into the Association to work in Russia showed that an era of open borders had come and establishment of new economic relations had started to replace the old ones that had collapsed in the period of changes.

TOP10 most popular international manufacturers represented in pharmacies in Moscow in 1994

41%*	Gedeon Richter, Polfa
35%	Bayer
31%	KRKA
24%	Chinoïn
21%	Hoechst
14%	Glaxo
10%	AWD, Meuselbach, Pharmchim, Sandoz

*Percentage of pharmacies that name the company as an important manufacturer
Source: Survey of the financial academy

TOP5 manufacturers by sales volume in pharmacies, 2013

Share	Company-manufacturer
6,40%	Novartis
5,40%	Sanofi-Aventis
4,40%	Pharmstandart
3,90%	Bayer
3,30%	Takeda

Source: «Monthly Retail Audit of Russian Pharmaceutical Market» DSM Group. ISO 9001:2008.

- ▶ **1998** – The collapse of the Russian financial system caused a dollar exchange rate rise and payments crisis. The Ministry of Healthcare of Russia set up a headquarters to control the situation on the pharmaceutical market – it was headed by the First Deputy Minister Mikhail Zurabov. A number of international pharmaceutical manufacturers suspended their activities in Russia, some even decided to leave the market. However, there were some companies that believed in the speedy recovery of the emerging market and took advantage of the situation to increase their presence in the country. These players stood to gain later on, developing their business based on the first version of the Federal Law on Medicines adopted on



22 June 1998 and Guidelines on the organization of production and quality control of drugs (GMP) approved by the Ministry of Healthcare (OCT 42-510-98).

- ▶ **2001** – Changes proposed to the Tax Code of the Russian Federation, 10% drug VAT was fixed.
- ▶ **2003** – In Istra, Moscow region a big plant KRKA-RUS started operations.
- ▶ **2004** – new State Standard (GOST) is adopted in Russia «Guidelines of Production and Quality Control of Drugs (GMP). GOST P 52249-2004», approved by the State Committee of the Russian Federation for Standardization and Metrology. In August the President of the Russian Federation signed the law of monetization of benefits that gives persons entitled to benefits the right to get monetary compensation instead of free drugs.

As a result of the administrative reform the industry is regulated not only by the Ministry of Healthcare and Social Development but also by the Federal Service on Surveillance in Healthcare and Social Development of Russian Federation. Market members describe its first head Ramil Khabriev as the one who actually created state regulation of the industry. Although in many aspects this regulation followed the example of developed countries, where AIPM member companies had already been operating for a long time, not all the regulator's actions were painless for the developing industry – in a few years Russian market covered the path that Europe and the USA spent several decades on.

However, the same year the French company Servier starts building factory called Serdix in the Moscow region. The project was launched in 2007.

In 2004 the first really major acquisition of a Russian company by a foreign company was held: STADA buys Nizhpharm. For the first time Russian manufacturing assets were so highly evaluated by an international strategic investor, which showed a growing interest in Russia's potential from the leaders of global pharmaceutical industry.



KEY DATES AND TRENDS OF THE PHARMACEUTICAL MARKET IN RUSSIA



- ▶ **2005** – the State Program of Drugs Supply (DLO) starts. It is a landmark initiative in the state guarantee system. The project was implemented quickly, creating the system of supplying the persons entitled to benefits with essential drugs, including medicines that were previously inaccessible. The launch of the incredibly large state program caused immediate Russian pharmaceutical market volume increase by 1/3. Russia became one of the fastest growing regional markets, like China, India and Brazil. At the same time, market changed dramatically. If certain drugs were included in the State Program of Drugs Supply, that necessitated one type of promotion strategy, and if they ended up in the commercial segment, other rules applied.
- ▶ **2007** – State Program of Drugs Supply was reformed. It was subdivided into two federal state programs – Essential Drugs Supply Sub-Program (ONLS) and «Seven Nosologies». The reason was insufficient financing of the State Program of Drugs Supply. Actual drug dispensing volume was twice the annual budget for the program (\$1 billion). Industry associations – AIPM, AEB, ARFP, SPFO – spoke out against the plan to solve financial problems by writing off the state debt to the suppliers. The new Minister of Healthcare and Social Development Tatiana Golikova received the task of regulating relationships between the participants of the market and introducing financial order into the system.
2007 is also the year of the beginning of strategic partnership between Polpharma and Akrikhin companies. As a result Polpharma became the majority stakeholder of Akrikhin.
- ▶ **2009** – Trying to overcome the consequences of the financial crisis, the government starts to control the prices of drugs: manufacturers of medicines included into Essential Drug List (EDL) have to register sale price limits. The same year the Federal Agency for Technical Regulation and Metrology approves the new National Standard of the Russian Federation «Good Manufacturing Practice for Medicinal Products (GMP)».

The Ministry of Industry and Trade approves the long-term development strategy of the pharmaceutical industry «Pharma 2020» for the period until 2020. The resulting strategy, where the government for the first time described its vision for industry development in the future, substantially influenced all further developments in the industry. Regional authorities took up the idea of import substitution and localization of international manufacturers in Russia. About 20 projects of pharmaceutical clusters were appeared just in one year. However, only a few of them were then developed. Most well-known clusters are located in Kaluga and Yaroslavl regions and in Saint Petersburg. Among their investors are AstraZeneca, Berlin-Chemie/Menarini, Novo Nordisk, Teva, Nycomed (Takeda), Novartis, R-Pharm, Hemofarm A.D.

- ▶ **2010** – The new law «On drugs' circulation» comes into effect on September, 1 replacing the previous one dating from 1998. Drug regulation responsibilities are divided between the Ministry of Healthcare (registration, expertise), the Ministry of Industry and Trade

(drug manufacturing licensing), the Federal Service on Surveillance in Healthcare (control over the drugs in circulation, pharmaceutical activity licensing). For the first time the period for drug registration is clearly stated as well as state price control for medicines included in EDL. Lastly, the date of GMP standard implementation is authorized – 1 January 2014. Only 30 of 400 Russian pharmaceutical manufacturers followed this standard in 2010.

Global pharmaceutical industry become completely convinced of the potential of developing countries. Pharmaceutical markets of Brazil, India and Russia worth 7.8, 3.9, 6.2 billion euros respectively in 2006, increase to 15.7, 7.9 and 10.2 billion euros in 2010. Among milestone events in the industry – Sanofi acquires a factory in the Orlov region by the Polish pharmaceutical group Bioton and starts for the first time in Russia full production cycle of insulin analogs.

- ▶ **2011** – The Federal special purpose program «Development of Pharmaceutical and Medical Industry of the Russian Federation until 2020



KEY DATES AND TRENDS OF THE PHARMACEUTICAL MARKET IN RUSSIA

and in further long-term prospective» was approved by the Government of Russian Federation, providing the focus on production localization in the territory of the country, growth of innovative component of the Russian pharmaceutical industry and also the country's transition to GMP standards.

- ▶ **2012** – In May Veronika Skvortsova is appointed the Minister of Healthcare of Russia. She had been working as Deputy Minister since 2008.
- ▶ **2013** – the Ministry of Healthcare of the Russian Federation issues the «Strategy of medicine supply for citizens of the Russian Federation for the period until 2025». It is focused on organizing of efficient and financially balanced system of drug supply. One of priority goals is to make people responsible for their own health. The current aim is not to saturate the market with the drugs as before, but to stimulate efficient use. It is emphasized that use of administrative resources is not enough to guarantee safety and quality of medicines – the role of business community and practical experience of commercial sector are also important. The implementation of effective drug use strategies expects to increase their affordability for people regardless of the region they live in.
- ▶ **2014** – AIPM celebrates the 20th anniversary of its activity in Russia. Since January 2014 GMP standards are obligatory for all the pharmaceutical manufactures in Russia, in many aspects due to the efforts of AIPM. The pharmaceutical market in Russia is over \$20 billion in customer prices, it has grown five times in the period of 20 years. Market saturation increased 1.4 times by nomenclature and 3.5 times in volume. The promise of companies – members of the Association to invest the «golden billion» (\$1 billion) in Russian pharmaceutical industry has been fulfilled with more than twice that amount in the last 5 years. Several dozen of big projects are at the stage of active financing. 59% of AIPM member companies that have already started production from the packaging stage in Russia are ready to discuss the possibility of shifting to deeper forms of localization by 2017-2018.



1994 – 2014

POPULATION

Expanding drug
nomenclature matrix

STATE

Investment into the economy
of around \$2 000 000 000

INDUSTRY

GMP in Russia



COLLEAGUES AND PARTNERS ABOUT AIPM

– *Ongoing healthcare reform in Russia is being implemented in different directions. What aspects of it should be considered as the main?*

– All the initiatives that are being implemented by the Government of the Russian Federation have the defined purpose of ensuring the health of our citizens. All the program and strategic documents approved over the last several years represent clear guidelines for the pharmaceutical business to build its own strategy on the Russian market. There is the implementation of the investment programs of foreign companies; the Russian pharmaceutical business is actively involved in partnerships with international manufacturers. Clear rules of the game are being created for all players, for example, associations and professional organizations in the pharmaceutical industry play a very important role in determining the position of the industry and market participants, in interaction with government authorities and just to clarify current problems in the industry. Events held by the Association always include an important agenda and concern the most actual issues. AIPM members are interested in getting firsthand the information about the latest initiatives of the Ministry, so AIPM plays an important communicative role.

– *What AIPM projects and initiatives are the most important in your opinion?*

– The support from industry associations is always important for the Ministry. The participation of AIPM in discussions of legislative initiatives of the Ministry is essential for the development of the industry policy. Most AIPM initiatives related to the development of competition and the improvement of legislation in the pharmaceutical industry, are in tune with the times and particularly up-to-date because of the processes in the legal framework. I hope that AIPM will continue to offer intelligent and well-considered decisions.



– *What is your view of further development of the pharmaceutical market in Russia? What is the role of the Association in this process?*

– For the last 5 years the pharmaceutical market has been growing more than 10% a year. I am sure that with the same activity of international and Russian manufacturers, the pharmaceutical industry will be one of the leaders in the economics in terms of growth. Indeed, one of the main factors for industry development are development of domestic production, attracting foreign investors and manufacturers for the development of local competencies, the creation of innovative products and therapies. We see the role of the Association is to explain the government policy in the pharmaceutical industry and to reflect the current situation in order to draw up guidelines for companies to create their own strategies. The Ministry of Industry and Trade of the Russian Federation tries to have the finger on the pulse of the market, considering opinions of its participants and, first of all, of professional associations as representatives of common interests of business. Our dialog was not always easy but always meaningful, and I hope this will remain in future. Obviously, AIPM has been one of the most representative associations on the pharmaceutical market. I wish the Association success for the benefit of its members and the Russian pharmaceutical market as a whole.

Sergey TSYB, Deputy Minister of Industry and Trade of the Russian Federation

– *Ongoing healthcare reform in Russia is being implemented in different directions. What aspects of it should be considered as the main?*

– Today innovative methods of diagnosis and treatment are becoming more accessible for the citizens of Russia. State policy and its welfare provide positive trend in the healthcare system. Support for these changes is the task of all market participants.

– *In your opinion what is the role of professional associations in the healthcare system in general and the Association of International Pharmaceutical Manufacturers in particular?*

– The pharmaceutical industry exists as an international concept. The success of different countries in the development and production of medicines in general provide medical advances in achieving the main goals of healthcare system - extending life and reducing morbidity of the population.



– The Association of International Pharmaceutical Manufacturers is a conductor and a defender of the interests of a number of R&D companies and manufacturers of the global pharmaceutical industry. Today's realities are such that manufacturers migrate across the world: the foreign become domestic, and this is also one of the merits of the Association. In addition, the Association of International Pharmaceutical Manufacturers is the conductor of innovation in regulation sphere. The Federal Service on Surveillance in Healthcare sees obvious benefits from working with the Association and hopes to develop a constructive dialog in future for the good of the citizens of Russia. I sincerely congratulate the Association of International Pharmaceutical Manufacturers with its anniversary! I wish you longevity, scientific, technological and marketing discoveries and productive development.

Mikhail MURASHKO,

Acting Head of the Federal Service on Surveillance in Healthcare

COLLEAGUES AND PARTNERS ABOUT AIPM

– Dear colleagues!

Congratulations to AIPM on the occasion of the 20th Anniversary! Your tireless work over many years to develop integration and mutual understanding on domestic pharmaceutical market is truly invaluable. The efforts of AIPM are aimed at combating counterfeit products, the implementation of the international standards in pharmaceutical industry, the localization of production of modern medicines. They help to realize the important mission of providing patients with high-quality medicines at reasonable prices. I wish you many years of success and fruitful work for the public welfare!

Igor KAGRAMANYAN, *First Deputy Minister of Healthcare of the Russian Federation*



Igor LANSKOY, *Advisor to the Minister on Healthcare of the Russian Federation on Communications and Public-Private Partnership*

– The Association of International Pharmaceutical Manufacturers (AIPM) is one of the oldest and most respectable professional organizations in the pharmaceutical industry. Due to the Association activity, the government and industry participants are continually in face-to-face communication; method of coordination and collaboration of the professional community are being developed; new directions of development are being determined in the sphere of clinical trials, expertise and registration of medicines; GMP standards are being implemented in Russia. The Ministry of Healthcare of the Russian Federation is very grateful for the contribution of the Association to the development of Russian healthcare system. We congratulate the management and members of the Association on their anniversary and wish you further fruitful work and new achievements for the benefit of the industry and the Russian citizens.



– I wish you further fruitful work and new achievements in the development, production and provision of the modern, effective, safe, high-quality and accessible medicines and successful implementation of AIPM plans in your noble activity! Let me thank the members of your Association for their contribution to the Russian healthcare system by supplying essential medicines of the population of the Russian Federation. Please accept my sincere wishes for happiness, prosperity for the family and good health to each employee of the Association!

Arsalan TSYNDYMEEV, *Director of the Department of state regulation of the circulation of medicines of the Ministry of Healthcare of the Russian Federation*



COLLEAGUES AND PARTNERS ABOUT AIPM



Sergey MURAVYEV, Director of Department of international cooperation and public relations of the Ministry of Healthcare of the Russian Federation

– 20 years is a long time, over which the Association has proved itself to be an active participant in the processes taking place in Russian healthcare system. The Association of International Pharmaceutical Manufacturers comprises more than 55 international companies that contribute to industry development in our country, supply new medicines, and develop scientific research. Due to the activity of the organization, international cooperation is developed and the constructive dialog between business and the government is maintained. I am sure that your work will give Russians access to a wide range of high-quality and affordable medicines.

– *What is your view of further development of the pharmaceutical market in Russia?*

– The signing of the international agreement that defines common principles and rules of circulation of medicines is provided for by the Treaty on the Eurasian economic Union, and the formation of a common market for medicines within the Eurasian Economic Union will largely determine the development of the pharmaceutical market in Russia. The transition to uniform requirements, prepared in accordance with international practices and the timely implementation of these requirements will allow to create the modern and efficient relations in the pharmaceutical market. These steps should lead to a qualitatively new development of the pharmaceutical industry, improving the competitiveness of Russia's pharmaceutical products, fostering consumer confidence and, ultimately, providing citizens with quality, safe and effective drugs.

Vasily BOITSOV, Director of the Department of technical regulation and accreditation of the Eurasian Economic Commission

– *In your opinion what is the role of professional associations in the healthcare system in general and the Association of International Pharmaceutical Manufacturers in particular?*

– I would like to note the significant role played by professional associations of pharmaceutical manufacturers in determining the rules of the game in the pharmaceutical market. For example, the participation of associations, including AIPM, in the creation of regulatory legal acts of the future common market of medicines within the Eurasian Economic Union. AIPM active participation in the working group on development of common approaches to regulation of circulation of medicines within the Customs Union and the Single Economic Space of the Board of Eurasian Economic Commission in the development of the good pharmaceutical practices has allowed to prepare the documents which define the foundations for the future common market of medicines within the Eurasian Economic Union. Also the professional associations play an important role in supporting the system of the continuous education in the pharmaceutical industry through the organization of the trainings and educational programs for the specialists of the pharmaceutical companies.



Alexander TSAREGORODTSEV, Minister of Healthcare and Medical Industry of the Russian Federation in 1995-1996, Doctor of Medicine, Professor

– In your opinion what are the main aspects of healthcare reform in Russia?

– The transition of the industry to international GMP standards. The market of medicines and products for medical care should be included as a basic element in system of drug provision of the population of Russia. The Law on fundamentals of protection of public health in the Russian Federation should be considered as a main law of healthcare system in Russia. I think the only achievement of the healthcare reforms in the Russian Federation is the inclusion of the Russian citizens into the compulsory medical insurance system.



COLLEAGUES AND PARTNERS ABOUT AIPM

– AIPM, as an industry professional association, is engaged in for what it was created – defends interests of its members. Sometimes these interests coincide with the FAS position for regulation of the pharmaceutical market, sometimes not, and then we argue, and sometimes even heatedly. Ultimately, the truth is born from such disputes. In many cases we are allies, first of all, it concerns questions of implementation of GMP standards, new requirements to a registration dossier format and risk management practices in drugs circulation. We are grateful to AIPM for the help and for a well-disposed criticism. It makes us better and the Russian regulation of the drugs circulation becomes more accurate and effective. We would like to wish AIPM to keep a constructive spirit and positive enthusiasm. We, probably, will come head to head more than once in the field of public discussions, but all this, eventually, will improve the atmosphere of regulation and to create the conditions for fair competition in the pharmaceutical market.

Timofey NIZHEGORODTSEV,
*Head of the Department for control
over the social sphere and trade
of the Federal Antimonopoly
Service*



– The healthcare sector has always been one of the most important for our citizens. At the same time, it is undisputable that development of this sector is connected to many difficulties that take years to overcome. For 20 years the Association of International Pharmaceutical Manufacturers has contributed to development of socially responsible manufacturers whose main goal is to support the Russian people with high quality, modern and affordable medicines. Let me also thank you on behalf of the Federal Tariff Service for your active role in discussions to improve state regulation in drugs circulation sphere. Your high professionalism, availability for collaboration and dialogue deserve the appreciation.

Igor BODYAGIN, Deputy Head of the Federal Tariff Service



– The main purpose of professional associations including the Association of International Pharmaceutical Manufacturers (AIPM) is collaboration with legislative and executive authorities, healthcare institutions and research centers, participation in discussions about issues of state regulations, quality control and production of the medicines, and also in developing of economic and legislative policy focused on the well-organized and open pharmaceutical market, improvement of the quality of healthcare system and increasing the range of modern medicines for the benefit of the population of Russia.

Julia ANTIPOVA, Deputy Head of the Department of Healthcare of Moscow

COLLEAGUES AND PARTNERS ABOUT AIPM

– AIPM’s contribution to these processes cannot be overemphasized. If we talk about professional associations, no organization has done more for the integration of Russia into a common space of drug regulation sphere, and the maximum harmonization of our legal acts with international. I had the opportunity to work with AIPM from the moment of its creation, as regulator and as head of large business structures, and as an scientific expert. The Association today is a constantly running generator of ideas to prepare draft legal acts; it actively advocates the discussion of prospective changes in the pharmaceutical market and is responsible for implementing ethical standards among market participants. I wish AIPM to keep further the activity, creativity, impartiality and objectivity, for the benefit of members of the Association and throughout the Russian pharmaceutical market.

Ramil KHABRIEV, *Director of N.A. Semashko National Research Institute of Public Health, Head of the Federal Service on Surveillance in Healthcare and Social Development in 2004-2007, Academician*



– At present large-scale but diversified healthcare reforms are being implemented. In my opinion it is impossible to determine the key areas as all are parts of an integral whole and they cannot be separated. It is still rather premature to talk about the success of the reforms, but some trends in health indicators are certainly outlined: the birth rate and lifespan of citizens have increased. Of course, professional public organizations promote reforms. Reforms are not for just one day and the role of the Association, given the considerable volume of drugs supplied to the Russian Federation is and will continue to remain very significant. A considerable amount has been done in this time. The pharmaceutical market has become completely different. New programs have appeared, all market sectors are developing, and drugs shortages have been eliminated in many positions. The role of the Association of International Pharmaceutical Manufacturers has been considerable in all of this. The Association and the market have experienced together all the difficulties and crises that the market has seen.

Elena TELNOVA, *Senior Research Scientist of the N.A. Semashko National Research Institute of Public Health, Acting Head of the Federal Service on Surveillance in Healthcare and Social Development (since 2012 – Federal Service on Surveillance in Healthcare) in 2010 – 2013, Ph.D*



Alexander CHUCHALIN, *Director of Scientific-Research Institute of Pulmonology of Federal Medical-Biological Agency, Doctor of Medicine, Academician*



– Today, compared to 10 years ago, the changes are very noticeable. Instruments of control have been made stricter, and the same applies to the reporting system (there are both positive and negative aspects). But I should say that changes take place approximately every two years. Our legislation in drugs circulation sphere has also changed over this period, so we are indeed changing. The example of developed countries like Sweden, Germany, France and Great Britain is a benchmark for us. The alliance between Russian and international pharmaceutical industries is an approach and a structure that can play the main role in making decisions that are beneficial for Russia. I admire AIPM and extend my sincere congratulations!

– Both as a physician and as a researcher, I have been very impressed AIPM projects, which are aimed at harmonizing with international of standards methodologies for clinical trials, registration of new drugs and their subsequent use in the Russian Federation. I should also note the efforts made by AIPM to harmonize our laws with the current legislation of the United States, Europe and other developed countries. It's no secret that their markets are much more advanced, and our practice, including legislation, lags noticeably behind. There is so much importance in the attempts made by AIPM together with the medical community to convey to the government and legislators that we need professional mechanisms of regulation that are already tried and tested in other countries. We have a lack of laws that would enable new drugs to be brought to the market quickly, but at the same time high-quality drugs, which we can use to treat patients effectively and safely. This AIPM activity is extremely important, and we do what we can to support them in this direction.

Sergey TYULYANDIN, *member of the Professional Society of Oncology and Chemotherapy Specialists, Doctor of Medicine, Professor*



COLLEAGUES AND PARTNERS ABOUT AIPM

– The Association is an accumulator for the opinions of international pharmaceutical manufacturers; it is a structure that produces a common attitude in the domestic pharmaceutical market, influencing on pharmaceutical market regulators. The Association collects on the positive and negative experiences of the pharmaceutical industry in different places of the world and enable a choice to be made of the best scenario for use within Russia. Its resources are directed at the general informatization of the population and the professional community regarding innovative drugs that appear on the international markets, so its activity is very important for doctors and patients alike. Throughout the 20 years of its operations, AIPM has participated in the evolution of the healthcare system in Russia, and at each stage it has made a sizeable contribution. We can say that AIPM representatives attend all negotiating platforms with authorities since the moment the Association was formed. They use rich expertise for drafting regulatory documents and legal acts. The Association has grown alongside the domestic healthcare system and has evolved together with it. I would like AIPM to continue working in the same vein with the health authorities and the medical community in Russia for the good of the patient and to develop further, giving us the opportunity to study global healthcare experience around the world.

Yan VLASOV, *Co-chairman, All-Russian Patients Union, Doctor of Medicine*



– If we talk about the contribution of international pharmaceutical manufacturers, we can identify several key aspects. First there is, of course, the introduction of innovative technologies, which include not only original medicine, but also technologies in research, manufacturing, marketing and management in the pharmaceutical industry. Also the international pharmaceutical companies have done a lot in the field of information and education of doctors and other health professionals. And we should add that in many cases they were the initiators of development, the introduction of international approaches to regulation of the pharmaceutical industry.

Roza YAGUDINA, *Chairman of the Department of the organization of drug supply and pharmacoconomics, I.M. Sechenov of First Moscow State Medical University, Ph.D., Professor*



– AIPM is not only an example of an organization that participates in development of an effective strategy in regard to public and private interests and a behavior model of participants of the global pharmaceutical market in the Russian Federation. Being aware of international experience in drug regulation, knowing the regulatory practice of different foreign countries, and having highly qualified specialists, the Association is an active participant in the public discussion of draft laws. The Association of International Pharmaceutical Manufacturers offers its point of view on various legislative provisions and entire law drafts. Their opinion is respected and taken into account, having a positive effect on legislative drafting activities. The Association’s positions concerning various legislative acts testify to the commitment of its members to the principles of socially responsible business and proper behavior on the pharmaceutical market as well as the unconditional focus on compliance with Russian legislation.

Talia KHABRIEVA, *Director of the Institute of Legislation and Comparative Law under the Government of the Russian Federation, Vice-president of Russian Academy of Sciences, Doctor of jurisprudence, Professor, Honored Lawyer of the Russian Federation*



COLLEAGUES AND PARTNERS ABOUT AIPM

Larisa POPOVICH, Director of Health Economics
Institute of National Research University – Higher School
of Economics

– AIPM is doing much in terms of education, the accumulation of best practices and that, in my opinion, represents a tremendous contribution to the development of Russian healthcare because the guidance documents and the social polls they conduct are invaluable for the Russian practice. No country in the world can produce all the drugs its needs. There are certain traditions in research and production: if one country has invented a drug that accurately, locally and effectively treats a disease, why invent it elsewhere? Pharmaceuticals and the healthcare system are sectors that do not need geographical boundaries and should be available to all humankind. In a global world pharmaceuticals also should be global. For Russia it is extremely important to seek not an autonomous existence but to find a niche in the overall chain, and produce what it is good at, manufacturing specific drugs. And then the world will be grateful to Russia. When an organization has worked as long as AIPM, it means that it has proved its necessity and importance. 20 years is a period of prosperity and maturity.

– It's difficult to appraise the role of international pharmaceutical manufacturers in two words. We can say that now it is immense – from access to medicines themselves to educational programs, supporting research grants, helping Russian scientists to participate in international research projects, and harmonization of drug circulation.

Alexey KOLBIN, Chairman of Clinical Pharmacology and Evidentiary
Medicine Department of Pavlov First Saint Petersburg State Medical
University, Doctor of Medicine, Professor





Valeriy BEREGOVYKH, Chairman of Industrial Pharmacy Department of I.M. Sechenov First Moscow State Medical University, Professor, Corresponding Member of Russian Academy of Sciences

– To develop a system of drug provision in Russia and raise further foreign investments the most important thing is to improve the entire spectrum of regulation, from laws to regulations of the Ministry of Healthcare and Ministry of Industry and Trade of the Russian Federation. We have to continuously improve the regulatory framework, just as the WHO and the EU do.



– Among AIPM initiatives and projects I would like to emphasize the continuous education of healthcare professionals including doctors, screening tests for the purpose of identifying the risk factors, support for scientific research such as registers, population studies and educational support. In my opinion, these are the most important and significant initiatives of AIPM members.



Sergey BOYTSOV, Director of the National Research Center for Preventive Medicine of the Ministry of Healthcare of the Russian Federation, Chief Preventive Medicine Specialist of the Ministry of Healthcare of the Russian Federation, Doctor of Medicine, Professor

COLLEAGUES AND PARTNERS ABOUT AIPM

– It's quite difficult to estimate the future development of the pharmaceutical market in Russia. One single law passed in the State Duma may change the situation. Large risks lurk in the lack of a foundation for a base coordinate system.

Vladislav KOROCHKIN,

First Vice-president of the All-Russian Public Organization of Small and Medium Enterprises Opora Rossii [Support of Russia] for expert-analytical activity



Alexey REPIK, *President of Delovaya Rossiya All-Russia Social Organization, member of the Public Chamber of the Russian Federation, Chairman of the Board of Directors of R-Pharm group of companies*

– Delovaya Rossiya works in the development of business climate, raising investment and technology, reduction of administrative barriers, implementing of best practices and business ethics. We rely on the support and experience of industry associations, and a great example is AIPM. The Association of International Pharmaceutical Manufacturers is an association of leading global companies, holders of best international standards in the pharmaceutical industry. The Association actively participates in expert work on improving legislation in the field of healthcare and drug circulation, designed for industry development and increasing the accessibility of modern, effective medicines for the public.

– The role of professional associations in the health industry is still not significant enough, but over time it will increase. It all depends on external, economic, and political organization. We lag behind in a number of areas, sometimes by 20 years and sometimes even by as much as 50 years and to make up for the lost time will require considerable effort and considerable investment.

Valeriy SERGIENKO, *Chairman of the Committee for Entrepreneurship in Healthcare and the Medical Industry of the Russian Chamber of Commerce and Industry*

Viktor CHEREPOV,
Chairman of the Health Industry Commission of the Russian Union of Industrialists and Entrepreneurs

– No modern industry, healthcare included, can be developed without open, direct communication between business, authorities and society. And communication is impossible without professional associations. I am glad to mention that AIPM has always played an active role, participating in all specialist events of the Russian Union of Industrialists and Entrepreneurs, so we could hear and clearly understand the opinion of the pharmaceutical industry. I wish our colleagues to remain optimistic, hardworking and to keep their polemic spirit!



– AIPM is one of the leading associations of the pharmaceutical market, not only because it has the largest number of members and includes the largest manufacturers. The main thing is that the Association has proven over the years that it is able to convey the position of its members to all segments of Russian society, from government officials to the consumer; the ability to put forward high-quality and constructive proposals. Strength of an AIPM position always was that the Association was able to harmonize requirements of our market with the best models of the international experience, it is a very important point. AIPM initially chose the right course, starting to build a dialog not only with the regulatory authorities, but also with other professional associations, the pharmaceutical market, analytical agencies, law firms and other interested parties.

Viktor DMITRIEV, *CEO, Association of the Russian pharmaceutical manufactures (ARPM)*

– In our market the Association of International Pharmaceutical Manufacturers (AIPM) was the first to work according to the new principles. AIPM was a new structure with new objectives and new working strategies. It was the pioneer, and a flock of other professional organizations followed its lead. AIPM was the first, and, as they say, to be first is both harder and easier. AIPM showed that professional associations are needed today, because many domestic companies were not ready for the new economic conditions. With the example of the Association we saw how we should operate; it was a model, using which we were able to move forward. AIPM played a major role in market development and promoting and upholding the interests of business in government structures.



Lilia TITOVA, *Executive director, Society of Professional Pharmaceutical Organizations (SPFO)*

COLLEAGUES AND PARTNERS ABOUT AIPM

– Professional associations have always played a crucial role at different stages of development of the pharmaceutical industry. I would even say that without the active role played by the Association, it would be impossible to imagine the dire consequences we would have encountered. In solving the problem of regulation of almost any industry, the state knowingly lags behind the industries themselves in the level of expertise which allow an objective understanding of very narrow and specific issues. Simply speaking, the state has not and could not have consciously accumulated expert resources similar to those accumulated in the industry itself. However, the state has to make decisions based on someone's detailed expert review. AIPM has done much to stimulate dialog between its members and the various structures in Russia to encourage partnerships in R&D. This is an important contribution, stimulating a whole range of processes, giving hope that Russia could in future play a role in the creation of innovative molecules. Whatever we may wish, foreign pharmaceutical manufacturers will continue to play a leading role in supplying the country's population with the most modern domestic medicines. It is important not to create artificial restrictions here, but rather to use this experience to create new opportunities and prospects. And the question here is not only about the supply of drugs as a commodity, but also to accompany all such activity with modern and proven approaches in the comprehensive solution to the supply of drugs. To this we can attribute the reimbursement system of the population upon the purchase of medicines, the practice of calculating reference prices, the implementation of the elements of health insurance, the introduction of pharmaco-economic knowledge, programs with new approaches, such as Risk Sharing, etc. Here the state may consider AIPM as a long-term partner.

Oleg FELDMAN, *Co-chair of the Russian Association of Pharmaceutical Marketing (RAPM), Director of Health Research Synovate Comcon*

Vadim KUKAVA,
*Executive Director
of the Association «Innovative
Pharma» (InPharma)*

– AIPM is the flagship of the expert pharmaceutical community in Russia.



– Business associations are the units of professional and public of leaders in business. They work together to achieve common goals. In the healthcare industry business associations are especially important because the final objective of their work is to improve health and living standards for everyone. Over 20 years of operations in Russia, the Association of International Pharmaceutical Manufacturers (AIPM) has achieved a great deal: innovative therapies are available for Russians, significant investment has been raised, and the production facilities are developed. The pharmaceutical market in Russia has increased five times in these 20 years and that really is a breakthrough! The role of business associations cannot be underestimated in our country. Representing manufacturers' interests and developing a business climate environment, we simultaneously promote sustainable economic growth and serve as reliable partners in implementation of national development programs.

Alexis RODZYANKO, *President & CEO
(American Chamber of Commerce
in Russia, AmCham)*

– The significance of international manufacturers is huge. Their appearance on the Russian market has led to the development and introduction of modern treatment programs for cancer patients, patients with orphan diseases, blood diseases, and so on. It is thanks to international manufacturers that the process of cooperation of our physicians with the international healthcare community has been accelerated and the latest developments of world pharmaceuticals and healthcare now serve domestic patients - Russian citizens.

Vyacheslav LOKSHIN,
President of AIPM, Kazakhstan

Arman VOSKERCHYAN,
*Chairman of the Board of Directors, international medical device
manufacturers association (IMEDA)*

– In the 20 years that the Association has been in operation, the healthcare system and the landscape of the pharmaceutical market has undergone significant changes, and we can say with confidence that the efforts of colleagues from AIPM on this process has had a significant impact. In our view, the role of professional associations over this period has also changed into an essential element of the healthcare system: today industry associations play the role of a partner of public authorities in the search for the most effective solutions in management of such a complex structure as the system of medicine care. AIPM has established itself as an expert platform for the pharmaceutical industry, as a voice that it is impossible not to hear.



– The establishment and development of the pharmaceutical market, despite its strict regulation by the state, is determined predominantly by its participants. Professional pharmaceutical associations set guidelines for its development. The most significant results of the Association of International Pharmaceutical Manufacturers involve the transfer into our Russian pharmaceutical market of drug promotion standards, participation in assessment and discussion about drug control strategies and strategies for interaction between the participants of the distribution system. It is a huge responsibility to create the first institution of professional associations and AIPM has taken on this mantle admirably. Over many years of operations, the Association has proved how important and necessary the opinion of a professional community is for the market.

Nelly IGNATYEVA, *Executive Director of Russian Association
of Pharmacy Chains (RAAS)*



– Life has shown us that the creation of AIPM 20 years ago had a considerable impact on the Russian medical community as a whole and, of course, on our patients. Running a pharmaceutical business honestly and transparently means caring for our patients, maintaining their health, well-being and a decent standard of living. AIPM members have developed and follow the AIPM Code of Practice. This example shows us how any multi-level system should operate, which has to have monitoring and reporting, and which should be based on ethical standards and of course, the law.

Elena NEVOLINA, *Executive Director of the Non-commercial
Partnership «Aptechnaya Gildiya»*

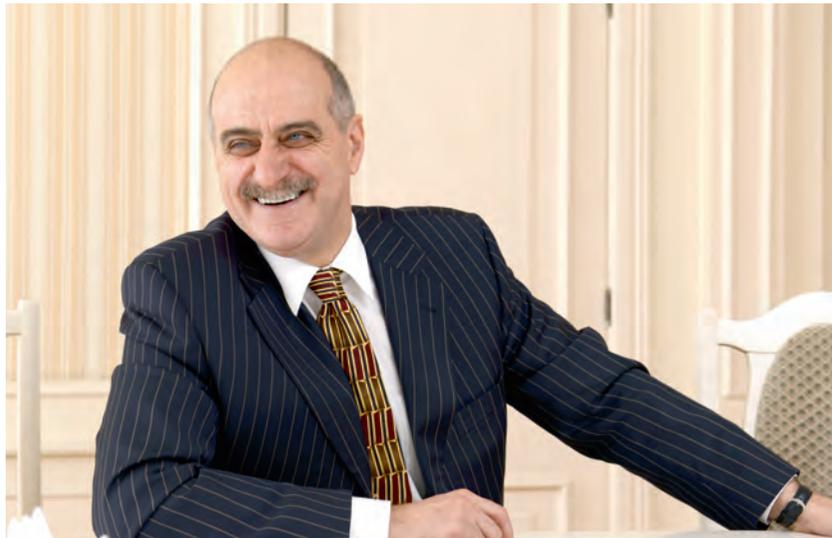
Dmitry TSELOUSOV, *Executive Director of Soyuzpharma Association*

– Producers who come to the Russian market have received help in the form of the support of the AIPM, acting as their guide in the new market. 20 years ago it was difficult to navigate or develop successfully within the framework of Russian legislation and clear guidance was needed to show the way. Over these 20 years, not only has the Association directed its members in this new market, but it also became the main creator of the legislation that have now been enacted. AIPM initiatives were a great help for all participants of the pharmaceutical market, for foreign and domestic participants. They set the necessary trends, which we are now guided by. We would like to see the Association continue its role in the future in setting the course for development of the pharmaceutical industry in Russia.

COLLEAGUES AND PARTNERS ABOUT AIPM

Vadim MUZYAEV, *President, Protek Group of Companies*

– AIPM represents international pharmaceutical manufacturers in Russia, conducts dialog with consumers and representatives of the authorities, and promotes cooperation of various representatives of the pharmaceutical market. On behalf of the Protek Group of Companies we would like to wish the Association prosperity, interesting new projects and successful implementation of initiatives in information, legal, scientific and technical support of international pharmaceutical manufacturers in Russia.



– I understand what an important role associations play in the formation of any industry, helping players discard the inevitable competitive differences and engage jointly in the formation of a sensible and healthy business climate. The market has to have reached a certain degree of maturity for such associations to form, and this is why it was such a boon that AIPM appeared in Russia 20 years ago, an organization not only to unite key market players, but also to bring to the Russian market the collective experience of the highly-developed international pharmaceutical industry. Importantly, it was not just business experience but also experience of self-organization of social responsibility. Your role in the formation of a civilized pharmaceutical market cannot be overstated.

Vladimir GURDUS, *CEO, RMI Partners, managing the NovaMedika project*





Ivan BLANARIK, CEO, Boehringer Ingelheim Russia

– Over the 20 years it has operated in Russia, AIPM has achieved a great deal as an organization uniting professionals of the pharmaceutical industry. It is impossible to list it all, so I will mention that the biggest achievement of the Association was that from an assistant in the formation of Russian business it has grown into the broadest platform that represents the pharmaceutical industry and contributes continually to the development of healthcare system in Russia.



– A particular advantage of the Association is that, over the many years of its operations, AIPM has always worked hard to bring an understanding to the market that international pharmaceutical manufacturers are reliable partners for the regulator, patient organizations and other non-profit organizations, as well as for domestic producers in solving important problems, all contributing to the development of the market. We noted the positive contribution of the Association in raising the standing of international manufacturers and supporting these companies in the fast-changing market conditions. Without doubt the Association helps companies to be heard, to defend their interests and to develop professionally.

Jane GELFAND, Adam Smith Conferences

COLLEAGUES AND PARTNERS ABOUT AIPM

– At the beginning of its path AIPM acted as a «voice» of the industry to report positions and claims of pharmaceuticals manufacturers on various issues in the health sector to the public authorities; thus the Association seeks to influence the acceptance or rejection of draft laws in the interests of pharmaceutical manufacturers. Over time, the role of the Association of International Pharmaceutical Manufacturers has changed dramatically. The Association has now reached the level of partner of the state; today it is a community of like-minded professionals, whose task is to develop consolidated industry solutions for the benefit of Russian patients. AIPM member companies aspire to become full participants in the process of improving the Russian healthcare system, focusing primarily on the interests of patients. A unifying concept in the search for common ground between the interests of the pharmaceutical business and the state lies precisely in the benefit of patients – their ability to access new, effective and safe treatment, and this is now a noticeably prevailing trend. A necessary condition for organizing a competitive and innovative pharmaceutical industry in Russia is scientific research and development. This requires investment in realizing the scientific and research potential and opportunities, including development of public-private projects and scientific partnership between Russian and innovative international companies. One of the key factors that directly influences the decisions of international companies on investments into scientific research and development in Russia is the creation of a positive environment to protect intellectual property rights. Apart from creating the very latest production facilities, global pharmaceutical manufacturers have raised the level for pharmaceutical production for the entire country.

Dmitriy EFIMOV, *CEO of Nizhpharm, Senior Vice-president of STADA AG in Russia, CIS and South-Eastern Europe*

– The pharmaceutical industry across the world is transboundary. Most developed countries are included in the exchange of capital, intellectual property, and ideas. The Association of International Pharmaceutical Manufacturers is one of the most effective points of communication between the Russian and international pharmaceutical community within this exchange. In future, we also would like to see the Association as an effective platform for interaction between the industry and the regulator, since business and the state are interested in achieving the most constructive dialog possible.



Kristina RODNIKOVA,
*Vice-President AstraZeneca
in Russia and Eurasia*





Irina DOROKHOVA, Director of External and Corporate Relations in Russia, Central and Western Europe, Johnson&Johnson

– AIPM has come a long way together with the formation of the Russian pharmaceutical market, experiencing all the ups and downs. Without exaggeration, it is its integral part. We have made this journey together, over many years. Just as before, the Association continues to pay close attention to the development of the market, the formation of civilized rules of the game, the introduction of modern standards, educational programs and industry self-regulation. We are pleased to be part of the Association and proud that we were there from its creation. Johnson & Johnson plays an active role in the work of the Association, its governing bodies, committees and working groups. Twenty years of working together have passed quickly, and we wish AIPM to continue working just as intensively and fruitfully for the benefit of Russian patients.



– What is your view of further development of the pharmaceutical market in Russia? What is the role of the Association in this process?

– The pharmaceutical industry in Russia in its present form has existed a little more than 20 years and it was created in the «self-organization» way. International pharmaceutical manufacturers were, in fact, the initiators and «drivers» of its development. The initial role was to transfer expertise from developed markets to our emerging market. Then partnerships and joint projects for development of the market and the system began to acquire special significance. I think one of the key merits of AIPM is its focus on improving the quality of pharmaceutical care to the population of Russia, rather than on short-term business goals of AIPM members. We all work in the healthcare system in Russia, and I am sure that the strategic interests of all the major players are eventually the same.

Marina VELDANOVA, Senior Vice-president, Ipsen in Russia and the CIS



COLLEAGUES AND PARTNERS ABOUT AIPM

– The issues of further investments and technology transfer are very important to us. We are ready to consider the localization of innovative medicines at the Takeda plant in Yaroslavl, but for this to be possible, the state will have to identify and inform industry about its priorities in the medical therapy areas, in the evaluation criteria of innovative medicines and, accordingly, their «desire» for state tenders. The state will support the priorities for innovation itself, and the industry will understand what the real demand is, and what is worth investing into in the medium and long term.

Andrey POTAPOV, CEO, Takeda Russia



Vasily IG NATIEV,
CEO, R-Pharm group
of companies

– International manufacturers have set an example and the tone for implementing clinical trials and manufacturing projects in Russia, bringing best global practices and contributing to their establishment by forcing leading Russian market members to be guided by and follow these practices. When these were partnership projects there was a direct exchange of experience and transfer of technologies both in the research and development and the manufacturing field.



– Dear Colleagues,

I heartily congratulate the Association of International Pharmaceutical Manufacturers (AIPM) on its 20th anniversary. SIA International was created in 1993, only a year earlier than AIPM. After the unexpected collapse of the USSR, we faced a daunting task of providing modern medicines to a huge country as soon as possible. We had to establish new links with pharmaceutical companies literally from the ground up, including the largest international companies, who came into our economy now that it had become open to the world. And of course in this matter the formation of AIPM was a great help for us. The Association helped and continues to help Russian pharmaceutical distributors and other players in the domestic pharmaceutical market to build transparent, clear, mutually beneficial and honest relations with each other that ultimately benefit the industry, government, and patients alike.

Igor RUDINSKIY, *Founder, SIA International*



AIPM MEMBER COMPANIES



Abbott is a global company devoted to improving life through the development of products and technologies for healthcare. With a portfolio of leading offerings in diagnostics, medical devices, nutritional supplements, and branded generic pharmaceuticals, Abbott serves people in more than 150 countries and employs approximately 69,000 people. In Russia Abbott has about 1,400 employees working in research and development, logistics, sales, marketing and others. Abbott offices in Russia are in Moscow, St. Petersburg, Krasnodar, Yekaterinburg, Samara, and Novosibirsk. Abbott has been operating in Russia since 1978.



Alexion Pharmaceuticals, Inc. is a global biopharmaceutical company that focuses on developing and delivering life-transforming therapies for patients with serious and life-threatening diseases. Patients with these diseases often have no effective treatment options, therefore they have a poor chance for recovery. In Alexion our goal is to develop innovative therapies that drastically transform patients' lives. Today our global operations platform serves patients in about 50 countries, and we are devoted to work with governments and payers around the world to ensure that patients have access to the therapies they urgently need. In Alexion the focus of our work is the patients we help. We aim to deliver breakthrough therapies that have a transformative impact on patients who are living with serious diseases, as well as those who have life-threatening or rare conditions.



AbbVie is a global, research-based biopharmaceutical company formed in 2013 following its separation from Abbott Laboratories. The company's mission is to use its expertise, experience of its dedicated employees, and unique approach to innovation to develop and market advanced therapies that address some of the world's most complex and serious diseases. AbbVie employs approximately 25,000 people worldwide and markets medicines in more than 170 countries. For further information on the company and its people, portfolio, and commitments, please visit www.abbvie.com.



Allergan is a multi-specialty health care company founded more than 60 years ago that is committed to discovering the best of science and developing and delivering innovative and effective treatments to help people achieve their life's potential. Today, we have approximately 11,500 highly dedicated and talented employees, global marketing and sales capabilities with a presence in more than 100 countries, a rich and ever-evolving portfolio of pharmaceuticals, biologics, medical devices, and over-the-counter consumer products, as well as state-of-the-art resources in R&D, manufacturing, and safety surveillance that help millions of patients see more clearly, move more freely, and express themselves more fully. From our beginnings as an eye care company to our focus today on several medical specialties, including eye care, neurosciences, medical aesthetics, medical dermatology, breast aesthetics, and urologics, Allergan is proud to celebrate more than 60 years of medical advances and is proud to support the patients and customers who rely on our products as well as the employees and communities in which we live and work.

The AMGEN logo consists of the word "AMGEN" in a bold, blue, sans-serif font, with a registered trademark symbol (®) to the upper right.

Amgen is a biotechnology company that develops, produces, and distributes innovative medicines made using genetic engineering methods. The company was founded in 1980. Being the leader in the biotechnological industry, Amgen was one of the first companies to achieve the full potential of the new generation of effective and safe medicines and fundamentally new approaches to the treatment of serious diseases. The strong portfolio of medicines being currently developed proves the commitment of the company to using scientific achievements for the improvement of people's lives. To this day Amgen stays true to its mission set out 35 years ago: «Serve patients suffering from serious diseases by designing innovative drugs to satisfy medicinal needs.» Amgen's branch office in Russia was opened in 2006.

The AstraZeneca logo features the word "AstraZeneca" in a dark red, serif font, followed by a stylized yellow and orange geometric icon resembling a DNA helix or a molecular structure.

AstraZeneca is a global pharmaceutical company that strives to provide patients with access to high-efficiency medicines through innovative scientific research activity and experience in the field of designing and selling products. The company's investments mainly support the development of prescription drugs in the field of oncology, cardiovascular diseases, and endocrine disorders as well as respiratory diseases and inflammatory diseases. The company is also working in the field of infectious diseases and psychiatry. At AstraZeneca about 50,000 employees work in more than 100 countries all over the world. Russia is one of key market priorities for AstraZeneca's activities. There are representatives in 78 Russian cities; over 1,400 employees work in AstraZeneca Russia contributing to innovative pharmaceutical industry development in Russia. In 2011 the company started construction of the plant in the Kaluga region, its opening is planned for 2015. Since 2011 AstraZeneca has lead joint R&D projects with Russian companies in the area of preclinical studies and translational scientific research.

The Astellas logo features a stylized red and grey star-like icon to the left of the word "astellas" in a lowercase, grey, sans-serif font.

Astellas is a company with headquarters in Tokyo. It was formed in 2005 from the merger of Yamanouchi Pharmaceutical and Fujisawa Pharmaceutical. The company continues to design superior products for different areas of medicine thanks to its highly professional Center of clinical trials and developments, making use of marketing potential in conditions of continuous growth of the world pharmaceutical market. There are about 17,500 employees working in the branches of the company. Astellas is devoted to improving people's lives all over the world by introducing new safe medicines. Thanks to significant investments in research and development Astellas is constantly strengthening its presence as a scientific research pharmaceutical company that provides patients all over the world with innovative drugs. Astellas concentrates on the following areas of medicine: oncology, transplantology, urology, dermatology, infections, and pain therapy.

The Baxter logo features the word "Baxter" in a bold, blue, sans-serif font with a yellow outline, set against a dark blue background.

Baxter – a global diversified healthcare company. The company develops and manufactures products to save and sustain patient's lives using innovative technology. Baxter products help thousands of people around the world, including patients with life-threatening acute and chronic conditions such as hemophilia, primary immune deficiency, and end-stage kidney disease. The company employs more than 61,000 employees in nearly 70 countries, manufacturing platforms located in 28 countries, the products are sold in more than 100 countries worldwide. Our mission is to be innovators in science and technology focused on quality and high standards.



Science For A Better Life

Bayer is an international corporate group specializing in healthcare, agriculture, and high-tech materials. As an innovative company, Bayer sets the development trends for high-tech fields. The products and services of the company serve the interests of people and improve their lives. The company's commercial activities are based on innovation, economic growth, and high yields. Bayer is a socially responsible company committed to the principles of sustainable and ethical business. In the 2013 fiscal year the number of employees of the group was 113,200 people with a sales volume of 40.2 billion euro, capital investments of 2.2 billion euro, and research and development investments of 3.2 billion euro.

B:OMARIN

BioMarin develops and commercialises innovative biopharmaceuticals for serious diseases and medical conditions. The company aims to develop first-in-class therapeutics to make a large, meaningful impact on small patient populations. BioMarin provides therapies for patients with rare genetic diseases. With five products on the market and a fully-integrated multinational organisation in place, BioMarin is providing innovative therapeutics to patients with serious unmet medical needs. We utilise innovative product development strategies to maximise the speed of development and quickly bring those therapies to patients. BioMarin is committed to serving the needs of patients, families, and physicians by providing rapid access to therapeutic treatment, disease education, and support services.
BIO/EU/14/083 February 2014



**BERLIN-CHEMIE
MENARINI**

The company **Berlin-Chemie/Menarini** is the leading representative of the pharmaceutical consortium of Italy - Menarini Group - in Germany and Eastern Europe, particularly in Russia. The Menarini Group pharmaceutical association has an impeccable reputation as a reliable partner in the development of new drugs and as a provider of information about modern scientific achievements. The two main strategic aims of the Menarini Group are innovative research and the internationalization of the healthcare market. The group has an impressive array of products developed using its own capabilities, and a high potential for the formation of strong partnerships with other pharmaceutical companies. All drugs of the Menarini Group, which includes Berlin-Chemie/Menarini, are manufactured according to GMP standards.



**Boehringer
Ingelheim**

The **Boehringer Ingelheim** group is one of the world's 20 leading pharmaceutical companies. Headquartered in Ingelheim, Germany, Boehringer Ingelheim operates globally with 142 affiliates and a total of more than 47,400 employees. The focus of the family-owned company, founded in 1885, is researching, developing, manufacturing, and marketing new medications of high therapeutic value for human and veterinary medicine. The important element of the corporate culture at Boehringer Ingelheim is social responsibility. This includes worldwide involvement in social projects, such as the «Making more Health» initiative and caring for employees. Respect, equal opportunities, and reconciling career and family form the foundation of the mutual cooperation. In 2013 Boehringer Ingelheim achieved net sales of about 14.1 billion euros. R&D expenditure corresponds to 19.5% of its net sales.



Bristol-Myers Squibb

Bristol-Myers Squibb is a global BioPharma company firmly focused on its Mission to discover, develop, and deliver innovative medicines that help patients prevail over serious diseases. Following its mission, Bristol-Myers Squibb brings to Russian market medicines that help patients in their fight against such diseases as cancer, cardiovascular disease, hepatitis B, HIV/AIDS, rheumatoid arthritis, and psychiatric disorders.



The transnational biopharmaceutical corporate group **Celgene** was founded in 1986. It is specialized in research and development of innovative methods of oncological and inflammatory disease treatment. The priority of our work is care for patients all over the world. We support them with treatment that significantly increases their lifespan and helps control symptoms of disease. We believe that everyone who can benefit from our investigations should be granted the opportunity.



Dr. Falk Pharma GmbH is an independent company based in Freiburg im Breisgau, Germany. For more than 50 years the company has been the leader of the pharmaceutical market in the field of gastroenterology and hepatology. The pharmaceuticals of the company are on sale in 68 countries of the world. Since 1960 Doctor Falk Pharma GmbH earned a reputation as company distinguished in aspiration to the highest quality of pharmaceutical production, support of scientific and medical research, and also a policy of assistance to increase of knowledge of doctors and patients in the field of the latest achievements of gastroenterology and hepatology.



EGIS Pharmaceuticals, headquartered in Budapest, Hungary, is one of the leading pharmaceutical companies operating principally in Central and Eastern Europe. The company's history dates back to more than a century and its activities extend to every field of the pharmaceutical value chain: from R&D through the production of APIs and FPs to sales and marketing. EGIS research work focuses mainly on effective drugs to treat cardiovascular diseases, disorders of the central nervous system, as well as the respiratory, gynecological and digestive systems. The manufacturing system of Egis complies with international GMP directives as well as the strictest pharmaceutical licensing body, the American FDA. The company's product portfolio consisted of 560 products that belong to 144 product families and contain 128 kinds of active ingredients. The company sells its products in 67 countries worldwide and has representative offices and subsidiaries in 20 countries; first of all to Russia, Central and Eastern-European countries, and the CIS countries.



Eisai – one of the leading companies in the global market of pharmaceutical research. Our mission is to focus on the patients and their families and increase the health care effectiveness. Eisai's research work focuses on three main areas: oncology, including anticancer therapy, regression of tumors, blocking tumors, antibodies, etc.; neurology, including Alzheimer's disease, epilepsy, pain, and weight loss; vascular/immunological reaction, including thrombocytopenia, rheumatoid arthritis, psoriasis, and inflammatory bowel disease. The company is operating in the US, Asia, Europe and at home in Japan. It has more than 10,000 employees all over the world. Eisai's Knowledge Centre in Hatfield (UK) has recently been expanded, and now there is a universal high-performance packaging plant. Moreover, the company recently entered the markets of Europe, Middle East, Africa, Russia and Oceania (region EMEA). Sales and marketing of Eisai EMEA are working in more than 20 countries.



Austrian pharmaceutical company **EVER Pharma** (former EBEWE) was founded 80 years ago in 1934. Today the company has more than 40 representative offices on five continents of the world. Ever Neuro Pharma focuses its activity on research in the field of neurodegenerative and cerebrovascular diseases, and on the development of new innovation-driven products. Cerebrolysin is a product with proven neurotrophic activity similar to the effect produced by natural nerve growth factors.



Eli Lilly is a global healthcare leader. For 25 years of its presence in Russia the company has been meeting the diverse needs of patients and those who care for them. Eli Lilly has marketed over 30 medicines to treat diabetes, osteoporosis, mental disorders, cancer and men's health. More importantly the company contributes to Russian healthcare development to make life better for patients through R&D, technology transfer, collaborations and educational initiatives. Eli Lilly in Russia For Better Health!



Ferring Pharmaceuticals – international biopharmaceutical company, a recognized leader in the production of original drugs based on natural peptide hormone of the pituitary. Ferring develops innovative drugs for the treatment of diseases in such fields of medicine as reproductive health, oncology, urology, gastroenterology, endocrinology and orthopedics. Research activities and products of the company are connected by a common focus of providing specialized drugs that can fight various diseases and pathologies, using resources and operational capacity of the organism. Ferring has its own production facilities in several European countries and in South America, Israel and China. It is also currently building new facilities in the US and India. With the acquisition of Bio-Technology General in 2005 it obtained capabilities in recombinant biotechnology as well as more traditional pharmaceutical manufacturing. Ferring's branches of marketing, medical services and sales teams are working in nearly 60 countries and the management is carried out from the head office in San Prés in Switzerland. Number of employees worldwide is more than 5,000 people and treatments are available in 110 countries. Ferring's concept is – to become the main choice for patients, physicians and business partners, offering advanced drugs which «speak with the body in its own language».



Fresenius Kabi is a part of the German corporate group Fresenius SE & Co KGaA which is a world leader in production of medicines for health care delivery to patients in critical conditions including both hospital and domiciliary care. Principal directions of Fresenius Kabi activities are development and production of medicines and technologies for infusion therapy, enteral nutrition, chemotherapeutic agents and other intravenous injection drugs as well as production of their supporting equipment. Forming part of Fresenius SE&Co KGaA corporate group, Fresenius Kabi occupies the leading position in Europe and the whole world in the field of production and distribution of drugs for circulating blood volume compensation and clinical nutrition. According to IMS, Fresenius Kabi is the biggest world manufacturer of intravenous injection drugs.



The company **Galderma** is one of the world leaders in the development and production of medicines in the field of dermatology which focus on seven key areas: acne, psoriasis, rosacea, onychomycosis, pigmentary disorders, skin cancer and aesthetic medicine. Products of the company are represented in the markets of 80 countries with the support of more than 5,000 employees. Over 1,800 scientific publications, 550 inventions and 6,000 patents are the result of research activity of the company. Since it was founded in 1981 as a subsidiary of Nestle and L'Oreal companies Galderma's strategy has been focused on development high quality products that correspond with the needs of dermatologists and patients. In 2002 Galderma open the representative office in Russia and started to supply Russian pharmaceutical market with new products for dermatological disease treatment and skin care.



Gilead Sciences is a research-based biopharmaceutical company that develops and implements into clinical practice innovative therapies in the field of pharmaceutical market demand. In the focus of Gilead's attention are HIV/AIDS, hepatic diseases, oncological and inflammatory diseases as well as serious cardiovascular and respiratory diseases. In the portfolio of 16 medical products distributed on the global market there are HIV full therapy regimen therapies, whereas we are in constant search for potentially effective products. Gilead was founded in 1987 in Foster city (California). The company employs about 7,000 people all over the world. With our development our social responsibilities grow. We aim to make a contribution to the global access expansion of our medicines and benefit for the society we are working in. Gilead is the first pharmaceutical company to sign an agreement with the Drug Patent Society, the activity of which is focused on the expansion of access to high quality cheap antiretroviral agents by division of patents. Collaboration with various scientific, academic and business organizations as well as local communities are also in the core of our work.



GSK works in Russia staying true to its mission to improve people's lives, let them do more, feel better and live longer. GSK is an international research and production company with the number of employees over 100,000 people. The company's activity covers scientific researches in health care, development and production of medicines, vaccines and health products. GSK has been working in Russia for more than 25 years. Since 1997 the company has been developing production in Russia. LLC «SmithKlein Beckman Biomed» is one of the first Russian enterprises to work in accordance with GMP standards. GSK is one of the leaders in the context of epidemiological and clinical studies in Russia. Prescription drugs produced by GSK are used for the following areas of medicine: respiratory diseases, infectious diseases, diseases of central nervous system, urology, cardiovascular diseases, oncology, immunology, hematology, AIDS, dermatology, diabetes, intensive treatment, preventive vaccination.



Ipsen is an international pharmaceutical company founded in 1929. It is represented in 115 countries of the world. There are about 4,600 employees producing over 20 medicine products. The headquarters is located in Paris. Ipsen research team is currently developing new molecules as well as promoting products already present on the market. The aim of Ipsen investigations and developments is to satisfy doctors' and patients' needs offering innovative decisions for effective therapy. In 2013 scientific research expenditures came to 260 million euro. Ipsen has been represented in Russia since 1993. At the moment about 300 employees are working in more than 30 Russian cities. Ipsen portfolio in Russia includes almost all the products of the company used both in general therapeutic practice and for specialty care including aesthetic medicine. Ipsen products are included in Essential Drug List (EDL) as well as present on retail market. In the short term the company plans to start manufacturing activity in Russia.



Founded more than 125 years ago, **Johnson & Johnson** is the most comprehensive manufacturer of health care products. Today Johnson & Johnson has more than 275 operating companies in more than 60 countries employing approximately 128,700 people in three segments: Consumer goods, Medical devices & diagnostics and Pharmaceuticals. At Johnson & Johnson, everything begins with innovation. The Consumer segment includes a broad range of health and personal care products in the beauty, baby, oral care and women's health categories, as well as nutritional products and over-the-counter medicines and prevention platforms. The Medical Devices & Diagnostics segment focuses on technologies, solutions and services in the fields of cardiology, cardiovascular surgery, endocrinology, traumatology and orthopedics, vision care, wound care, aesthetics, sports medicine, infection prevention, minimally invasive surgery and diagnostics. The Janssen Pharmaceutical Companies of Johnson & Johnson are dedicated to addressing and solving important unmet medical needs, including oncology, immunology, psychiatry, infectious diseases as well as cardiovascular and metabolic diseases. Johnson & Johnson demonstrates a long commitment to doing business in Russia. The Company opened its office in Russia in 1991 and now is one of the key players in Russian healthcare system partnering with the Russian government, supporting the innovative economic development and realization of the state imperatives, contributing to living standard development for millions of Russian people.



Janssen is a subdivision of Johnson & Johnson international corporate group – the biggest product developer and manufacturer in the field of health care. Johnson & Johnson's mission statement is: «Our responsibility is to the patients, to mothers and fathers, to all who use our products. In meeting their needs everything we do must be of high quality». Janssen is searching for solutions for such serious problems of modern medicine as oncology, immunology, psychiatry as well as infection, cardiovascular and metabolic diseases. For more than 20 years Janssen has been present at the Russian market. It is in TOP10 companies of the industry. Janssen is a reliable partner in the field of healthcare development, carrying out wide range of manufacturing and research projects in Russia. The company supports social projects aiming to solve major medical and social problems and improve Russian people's lives.



The international pharmaceutical company **KRKA** is among the world's leading manufacturers, its products are sold in over 70 countries, including Russia. KRKA has been delivering its products to Russia for over 40 years. At present, approximately 160 brands out of over 200 high-quality product names are registered in 220 forms on the Russian market. The company makes significant investment in the Russian Federation. In 2011–2013, manufacturing facilities of its plant were enlarged. The cost of investments was 135 million euros. The plant KRKA-RUS is one of the most advanced plants in Russia, with manufacturing capacity of up to 1 billion pill capsules a year. To take care of your health, KRKA plans to continue strengthening its positions as a leading manufacturer of generics on the pharmaceutical market of Russia.



Laboratoires BOIRON is one of the largest European pharmaceutical laboratories founded in 1932 with the head office and production facilities located in France. Good manufacturing practices are applied throughout all production facilities and BOIRON subsidiaries in 18 countries. The Russian subsidiary – BOIRON LLC – was founded in September 2005. Ten medicines are registered in Russia, including already well-known medicines for the flu treatment, as well as the medicine for relieving symptoms of teething and the medicine for treatment of anxiety and sleep disorders.



Macleods Pharmaceuticals Limited. Having a vision to provide quality healthcare to humanity and with special focus on essential and difficult to make medicines, Macleods Pharmaceuticals Ltd was incorporated in 1986. Macleods has enjoyed rapid growth in recent years, growing at an average growth rate of over 22% for the past 5 years, with an established Representative office in CIS countries, Africa, South East Asia and Latin America. Macleods is currently ranked 10th (on mat basis source IMS) in Indian Pharmaceutical Industry and is recognized as one of the fastest growing pharmaceutical companies in India. Pioneering efforts of Macleods in providing medications for both chronic and acute therapy approved by various regulatory authorities of many countries makes Macleods truly a global pharmaceutical company.



MEDA is an international pharmaceutical company with branches in more than 60 countries. It keeps constantly expanding in fast growing markets. MEDA is ranked 48th biggest world pharmaceutical companies. The headquarters is located in Solna, Sweden. MEDA's history in Russia started in 2008 when the representative branch was opened. For this period the company has managed to expand the geography of its presence in Russia to the 40 biggest cities from Kaliningrad to Vladivostok. Due to activity of Russian branch office the most innovative, globally respected medical products have become affordable for customers. There are over 20 medicines registered in Russia, some of them are unique, with no analogues. MEDA products serve society by improving welfare and living standards of the population.



MERCK – innovations for life. MERCK is a leading company in the production of innovative, high-quality and high-tech products in the pharmaceutical and chemical industries. About 38,000 employees in 66 countries work to improve the quality of life of patients, to further the success of our customers and solve complex problems. MERCK is the world's oldest chemical and pharmaceutical company. Since 1668 the company's name has been synonymous with innovation, business success and responsible entrepreneurship. Up to now the family of founders still are major shareholders. Pharmaceutical business MERCK: Merck Serono develops and manufactures innovative prescription and OTC drugs. The company carries out its own research, annually investing more than 1 billion euros. In the 1899 the company MERCK began to work in the Russian market and had several offices in different cities. After World War I Russian offices were closed, and the property was expropriated. The return of Merck KGaA in Russia was in 1993. Since 2008 the company has been operating as a Russian legal entity – LLC Merck.



Merz – respectable, reliable and innovative company specializing in the design and manufacture of products for the modern quality of life of their patients. Company mission: «Merz aims to help people to look better, to feel better, to live better.» The company founded over 100 years ago by German chemist Friedrich Merz is still in the hands of the Merz family. Family values are in the heart of corporate culture of Merz: «it's important for company to transmit them from generation to generation». Having professional expertise in the field of neurology, hepatology, immunology and clinical dermatology from 2014 Merz focuses on aesthetic dermatology and botulinum therapy. The Russian division of Merz has been working since 1997. The Russian office is one of the largest Merz branches and ranks third in terms of sales in the world. Today there are 44 registered medicines, cosmetics and medical products that promote Merz in Russia.



In Russia **Novartis Group** companies offer solutions in health care that meet the new needs of society and patients. The company has a diversified portfolio and now it occupies a leading position in the Russian market in the field of innovative medicines, branded generics and OTC drugs, drugs for the protection of vision. The company in Russia has more than 120 years history. Since the opening of the first pharmaceutical factory in the late XIX century to this day Novartis group of companies is a reliable partner of Russia in the development of health care and improvement of patient access to quality care. In December 2010, Novartis Group companies announced a strategic investment program in Russia in the amount of \$500 million. In June 2011 Novartis started construction of a pharmaceutical plant in St. Petersburg, the estimated production capacity of 1.5 billion units per year. After the opening the plant will be a platform for the introduction of advanced pharmaceutical technologies in Russia. Today in Russia all business units of the company are represented, more than 2,700 employees are working for the benefit of Novartis patients in most Russian regions. Novartis Pharma – one of the world leaders in the development of original prescription drugs. Sandoz is one of the leaders in the field of generic pharmaceuticals. The company offers a broad portfolio of high-quality and affordable drugs that are out of patent protection. Alcon focuses on the development and creation of innovative products and technologies in the field of surgical and therapeutic treatment of eye diseases and contact correction of vision.



MSD, known as Merck & Co. in the United States and Canada, is a global healthcare leader working to help the world be well. Through our prescription medicines, vaccines, biologic therapies and animal health products, we work with customers and operate in more than 140 countries. We deliver innovative health solutions in the therapeutic areas like endocrinology, infectious diseases, oncology, immunology, respiratory, cardiovascular diseases and women's health. We also demonstrate our commitment to increasing access to healthcare through far-reaching policies, programs and partnerships.



Novo Nordisk – a global pharmaceutical company and a global leader in developing and manufacturing products for the treatment of diabetes with a 90-year history of innovations. The company also has leading positions in areas such as haemostasis management, growth hormone therapy and hormone replacement therapy for women. The headquarters is located in Denmark. More than 40,700 employees are working in 75 locations around the world. The priority of Novo Nordisk in Russia is increasing the availability of innovative medicines for the treatment of socially significant diseases such as diabetes. For this purpose, in the Kaluga region in industrial park Grabtsevo a high-tech production plant of modern insulins in accordance with GMP standards was built.



Pfizer is represented in Russia since 1992, and now more than one thousand employees working in more than 50 cities across the country. Today there are more than 100 registered Pfizer drugs in Russia. In 2011, Pfizer launched the investment strategy «More than medication». Localization of production, educational programs with leading universities, support of Russian research projects, charitable programs are the most important activities in Russia. That's why Pfizer's investment strategy is not just business – it is a contribution to development of Russian innovations in medicine, modernization of the pharmaceutical industry, improving the quality of care, increasing life expectancy and improving health and well-being of Russians. Following its obligations, Pfizer, as a leading biopharmaceutical company in the world, collaborates with health professionals, government agencies and local communities so Russian patients have access to innovative and quality medicines.



Akrikhin (Polpharma) is one of the leading Russian pharmaceutical companies manufacturing high-quality medicines and one of the top 10 (by sales volume) local pharmaceutical manufacturers on the Russian drug market. Akrikhin (Polpharma) was founded in 1936. Company's product portfolio includes over 200 products belonging to main pharmacotherapeutic groups: tuberculosis, diabetes, cardiology, neurology, pediatrics, gynecology, dermatology, urology, ophthalmology, etc. Akrikhin produces a wide range of drugs of public importance. It is one of the leading Russian manufacturers of medicines included in the Essential Drug List. Akrikhin (Polpharma) manufacturing complex is located 20 km outside Moscow. It includes workshops manufacturing virtually all dosage forms: tablets, capsules, liniments, ointments, creams, syrups, gels and suppositories – the total annual output exceeding 50 million packages. In 2010–2016 the company is implementing an investment program aimed at updating and reconstructing the manufacturing facilities.



Pierre Fabre

Group **PIERRE FABRE**, the second largest private pharmaceutical company in France, is well-known worldwide for its medical products and medical cosmetics brands. It was created by pharmacist Pierre Fabre (1926–2013) in 1961. The result of his 52-year activity is truly staggering: from a small pharmacy in the town of Castres to the 2nd private pharmaceutical company and the 1st Dermo-cosmetics laboratory of France, to international fame and direct presence in 140 countries with a total number of employees more than 10,000 people. PIERRE FABRE success is driven, first of all, by research activities carried out directly in Laboratoires PIERRE FABRE. The company's strategy involves 5 main areas of research: Oncology, Central Nervous System, Cardiovascular System, Immunology, Dermatology. Main divisions of the company are PIERRE FABRE MEDICAMENT and PIERRE FABRE DERMO-COSMETICS. The first deliveries of drugs in Russia took place in 1993, and the first dermo-cosmetic products were sold in 1999. In 2009 the LLC Pierre Fabre subsidiary was opened. In 2014 the company in Russia had more than 200 employees, engaged in promotion of dermo-cosmetic products and medicines.



R-PHARM

R-Pharm – Russian high-tech pharmaceutical company. Major focus of the company is on the area associated with the development, research, production, bringing to market a wide range of medicinal products intended mainly for stationary and specialized medical care. The main activities are the production of finished dosage forms, active pharmaceutical ingredients, chemical nature and biotechnological substances, research and development of innovative products and technologies, the output on the Russian market of modern highly effective drugs. Today the company employs more than 3,200 highly qualified professionals in Russia; there are more than 40 branches and representative offices. The company operates throughout the territory of Russia, CIS, USA, Germany, Japan, Turkey and India. Holding structure includes pharmaceutical complexes located in Yaroslavl, Kostroma region, Novosibirsk, Germany, a scientific and production complex is being constructed in Rostov. During the work of the manufacturing complexes audits of the world's leading manufacturers of medicines were successfully held. The company uses dozens of sophisticated modern production technologies that have not previously been used in Russia.

RANBAXY

Trusted medicines. Healthier lives

In 1993 **Ranbaxy** Laboratories opened its own representative office in Russia. This bold step ensured wide awareness of the company's pharmaceutical products to the Russian health care professionals and citizens. Ranbaxy improved distribution of its products in Russia with opening of its CJSC entity in 2004. Ranbaxy production has been present in Russia since the early 1990s. The company has a strong portfolio in gastroenterology, cardiovascular, metabolic segments and other social important therapies. In the year 2000, Ranbaxy introduced its range of popular antibiotics. Over the years, Ranbaxy's products have won several recognitions, the latest being the Marka No1, Peoples award and the Platinum Ounce award.

Roche

Headquartered in Basel (Switzerland) **Roche** is a leader in research-focused healthcare with combined strengths in pharmaceuticals and diagnostics. Roche is the world's largest biotech company, with truly differentiated medicines in oncology, immunology, infectious diseases, ophthalmology and neuroscience. Roche is also the world leader in in vitro diagnostics and tissue-based cancer diagnostics, and a frontrunner in diabetes management. Roche's personalised healthcare strategy aims at providing medicines and diagnostics that enable tangible improvements in the health, quality of life and survival of patients. Twenty-four medicines developed by Roche are included in the WHO Model Lists of Essential Medicines, among them life-saving antibiotics, antimalarials and chemotherapy. In 2013 the Roche Group employed over 85,000 people worldwide.



HEALTH ▾ HYGIENE ▾ HOME

RB* is the world's leading consumer health and hygiene company. The company has operations in over 60 countries, with headquarters in the UK, Singapore, Dubai and Amsterdam, and sales in almost 200 countries. The company employs approximately 37,000 people worldwide. With a purpose of delivering innovative solutions for healthier lives in happier homes full of joy, RB is in the top 20 of companies listed on the London Stock Exchange. Today RB is one of the biggest companies leading in its fast-growing categories, driven by an exceptional rate of innovation. Its portfolio consists of 19 global brands, each of them is best in its category including health, hygiene and home. RB is also the Save the Children charity's largest FMCG global partner.

*RB is the trading name of Reckitt Benckiser group of companies

SANOFI

Sanofi – one of the global healthcare leaders. Concept of company's development based on some growth platforms: diabetes solutions, human vaccines for the prevention of infectious diseases, innovative medicines, drugs for the treatment of rare diseases, consumer healthcare, OTC drugs and nutraceuticals, animal health and also programs of increasing the availability of treatment in countries with developing economies. Sanofi has worked in Russia for 45 years. Sanofi today occupies a leading position on the Russian pharmaceutical market offering its patients a wide range of original and generic medicines in major therapeutic areas such as diabetes, cardiovascular disease, cancer, diseases of the central nervous system, internal medicine, vaccine-rare disease, as well as veterinarians. In 2010 in Orel high-tech production facility Sanofi-Aventis East was launched. Currently it is the first and only full-cycle plant in Russia producing the most modern insulin. Production capacity of the plant is sufficient to meet the needs of markets in Russia and CIS countries in the modern insulin.

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In 1954, Dr. Jacques Servier founded pharmaceutical company in Orleans (France), which employs nine people. Jacques Servier's love to the profession, his faith in the research, the understanding of the needs of others and the desire to develop contributed to such impressive growth of the company. Today it is the leading independent French pharmaceutical company, which is represented in 140 countries on five continents, employing more than 21 thousand employees worldwide, including 3,000 scientists developing new drugs. **SERVIER** - is a company conducting research in the following areas: cardiovascular disease, central nervous system, diabetes and rheumatology. In Russia the company has also invested in the development of an international clinical research center and in the establishment of an industrial complex. Today this complex allows the company to be among the first players in the market producing about 80% of drugs intended for the local market.



STADA CIS – Russian holding company forming a part of STADA Arzneimittel AG international group, one of the world leader among manufacturers of generic drugs. STADA CIS has diversified organizational structure which includes the pharmaceutical companies representing three business areas: development, production and promotion of pharmaceutical products. Currently the product portfolio of STADA CIS includes more than 170 medications of various ATC-classes and pharmaceutical forms, produced by leading Russian and international pharmaceutical companies – NIZHPHARM, STADA AG, Hemofarm A.D. and Grünenthal. While elaborating the portfolio STADA CIS places a priority on pharmaceuticals used in gastroenterology, neurology, gynecology, cardiology, urology, musculoskeletal system disorders and antiviral medications. All production sites of the holding comply with the GMP international standards.



As one of the world's leading specialty biopharmaceutical companies, **Shire** has emerged as a company fully focused on a single purpose: to enable people with life-altering conditions to lead better lives. Shire HGT, a vastly experienced and highly dedicated business unit of Shire Pharmaceuticals Ltd, specialises in discovering and developing innovative treatments for rare genetic diseases such as Fabry disease, Hunter Syndrome, Gaucher disease, hereditary angioedema and other.



LLC **Takeda Pharmaceuticals** (Takeda Russia), headquartered in Moscow, is a part of Takeda Pharmaceutical Company Limited, Osaka, Japan. It has a commercial presence in around 70 countries, with particular strength in Asia, North America, Europe and fast-growing emerging markets including Latin America, Russia-CIS and China. Takeda's areas of focus include such therapeutic areas as: central nervous system diseases, cardiovascular and metabolic diseases, gastroenterology, oncology and vaccine. The staff of Takeda in Russia is more than 1,450 people working in more than 80 cities. The company has its own high-tech factory in Yaroslavl with international and Russian standards (GMP). Production release at the plant began in September 2013, the launch of a full cycle of key products is planned for 2014-2015. Takeda develops R&D partnership with leading research institutes, invests in the development of pharmaceutical industry professionals.



Inspired by **patients.**
Driven by **science.**

UCB – global biopharmaceutical company focused on severe diseases in two therapeutic areas: central nervous system and immunology. It operates in more than 40 countries supporting more than 8,500 people. We combine biology and chemistry to make major breakthroughs. By integrating our expertise in large, antibody-based molecules and small, chemically-derived molecules, we can offer patients with severe diseases and their physicians the advantages of both large and small molecules to produce extraordinary breakthroughs. We cooperate with the leaders in the pharmaceutical industry.

The Zambon logo features the word 'Zambon' in a bold, white, sans-serif font, with the year '1906' in a smaller font directly below it. The entire logo is set against a solid green rectangular background.

Zambon
1906

Zambon Pharma is Italian-based multinational pharmaceutical company. It was established in 1906 and up to now it is a private company. Zambon Pharma has historically stood out in the field of scientific and pharmaceutical research, developing important new molecules that have become best in class in the treatment of various wide-spread diseases: acute and chronic bronchitis, idiopathic pulmonary fibrosis, non-complicated urinary tract infections, slight to moderate pain and ear aches. Its work spans the entire chain, from Product Innovation (Research and Development) to Production and Marketing. Russian representative office was opened in 1995. Since that time Zambon Pharma actively collaborates with Russian scientific & medical society. Many Russians patients had the opportunity to benefit from the high efficacy and safety of the Zambon Pharma's products during these years.



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