



EXPANDING HORIZONS: MARKET OPPORTUNITIES FOR INDIAN PHARMA MANUFACTURERS IN CIS COUNTRIES

APIs | Intermediates | Pellets | CDMO | Impurities

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Ministry of Health of the
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The background of the slide features a close-up, slightly blurred image of the Indian national flag. The flag is oriented vertically, with the saffron band at the top. A white Ashoka Chakra (24-spoked wheel) is centered on the blue middle band. The white and dark blue stripes are visible at the bottom. The flag is draped over what appears to be a textured, blue fabric surface.

CIS region is a fast-growing pharmaceutical destination with strong import dependency.

01

Indian manufacturers are well-positioned due to cost advantage, GMP quality, and global credibility.

02

EAEU harmonization = single dossier, multi-country access.

03

Pharma Eurasia 2025 is the most direct gateway to Central Asia's booming pharma markets.

The CIS Market Landscape

9 MAJOR CIS NATIONS

Russia, Kazakhstan, Uzbekistan,
Azerbaijan, Armenia, Kyrgyzstan,
Tajikistan, Turkmenistan, Belarus

POPULATION

~250 million

- Governments actively promoting local manufacturing partnerships.
- Over 75% of APIs and intermediates are imported.



Key Growth Drivers

- Modernization of healthcare & increasing government spend.
- Post-COVID emphasis on domestic API independence.
- High unmet need for intermediates and analytical support.
- India recognized as a trusted global source for APIs and generics.

OPPORTUNITY SNAPSHOT BY PRODUCT CATEGORY

SEGMENT	MARKET POTENTIAL	KEY DRIVERS
APIS	★★★★★ Very High	Generic demand; reducing reliance on China
Intermediates	★★★ High	Minimal domestic synthesis facilities
Pellets / Granules	★★★ Moderate- High	Growth in controlled-release formulations
CDMO / CMO	★★★★★ Very High	Outsourcing & local production incentives
Impurities / Analytical Services	★★ Emerging	Stricter EAEU quality norms

// FOCUS: UZBEKISTAN



Fastest-growing
pharma market in
Central Asia.



Tax holidays,
100% repatriation
of profits, pharma
free zones.



Active government
drive for joint ventures
and tech transfer.



Best suited for
Indian CDMO &
intermediate
suppliers.

// FOCUS: KAZAKHSTAN



Part of EAEU → easier regulatory access to multiple CIS countries.



Government investment in hospitals, diagnostics, and pharma clusters.

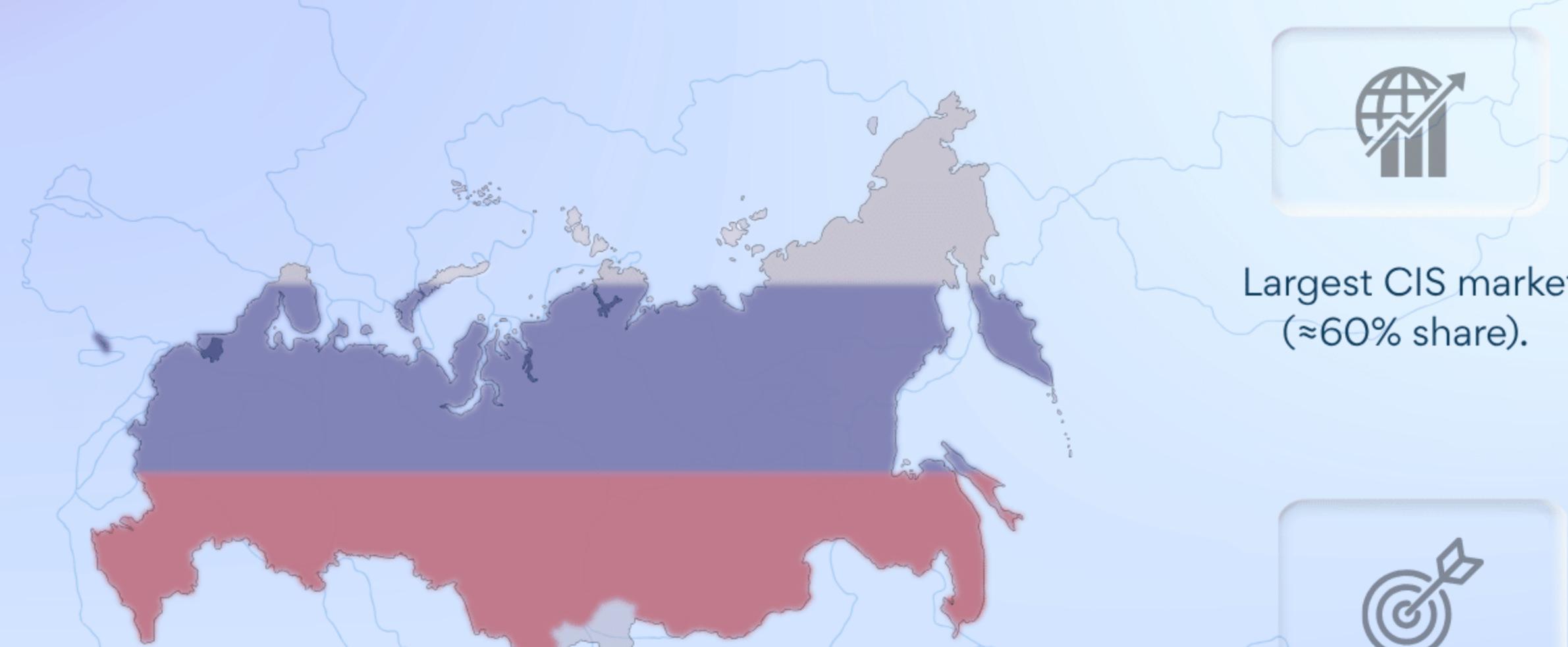


Growing demand for CDMO services, packaging, and analytical validation.



Incentives for PPP and foreign manufacturing.

// FOCUS: RUSSIA



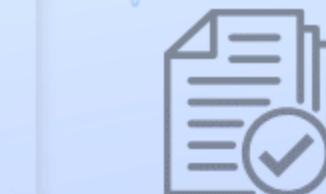
Largest CIS market
(≈60% share).



Import substitution
drives collaborative
manufacturing.



Opportunities in
oncology, biosimilars,
and high-value APIs



Complex regulatory
regime – demands
detailed documentation
and local representation.

Regulatory & Trade Insights

- EAEU dossier = access to 5 markets (Russia, Belarus, Kazakhstan, Kyrgyzstan, Armenia).
- Non-EAEU markets (Uzbekistan, Azerbaijan, Turkmenistan) require localized filings.
- Priority on GMP compliance, stability data, analytical validation, and pharmacovigilance.

COMPETITIVE EDGE FOR INDIAN MANUFACTURERS

WHY INDIA WINS	LOCAL CHALLENGES
Proven excellence in cost-effective, high-quality manufacturing.	Lack of harmonized regulation requires separate, time-consuming product registration per country.
Strength across the value chain: API Intermediates Formulations Analytical.	Heavy reliance on imported APIs creates vulnerability to supply disruptions.
Flexibility to form JVs, contract manufacturing, and distribution alliances.	Intense generics competition and regional government price controls squeeze profit margins.
Supported by Pharmexcil and Indian missions in CIS nations.	Continuous and significant investment needed to meet evolving EAEU GMP and quality standards.

Why Participate in Pharma Eurasia 2025

Central Asia's only dedicated Pharmaceutical Networking platform.

Meet Pharma formulation companies, Importers, distributors & regulators.

Buyer–Seller program connecting exhibitors to verified partners.

Get first-mover advantage in
Uzbekistan's healthcare
transformation.

40+

Participating
Countries

200+

Expected
Exhibitors



Early access to growing CIS markets

High-level visibility with key stakeholders

Market intelligence and regulatory contacts

STRATEGIC ADVANTAGE OF EXHIBITING AT PHARMA EURASIA

JV and technology-transfer opportunities

SUGGESTED ACTION PLAN



Identify top export-ready SKUs
(APIs / Intermediates / Pellets).



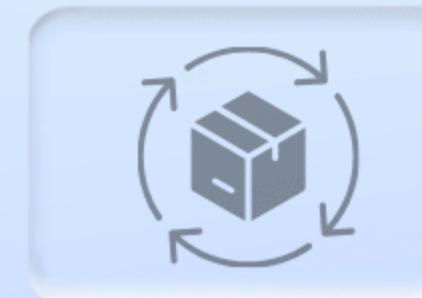
Prepare EAEU-compliant
registration dossiers.



Participate at Pharma
Eurasia 2025 to meet
distributors & regulators.



Appoint local partners
for filings and
distribution.



Launch pilot supply or
CDMO collaborations
by 2026.



21-22 May 2025

Tashkent Pharma Park, Uzbekistan

Your Gateway to the
CIS Pharma Market

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