

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

APIs | Intermediates | Pellets | CDMO | Impurities

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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.



**GLOBAL
TRENDS**



**CIS
DEMAND**



**INDIA'S
OPPORTUNITY**

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



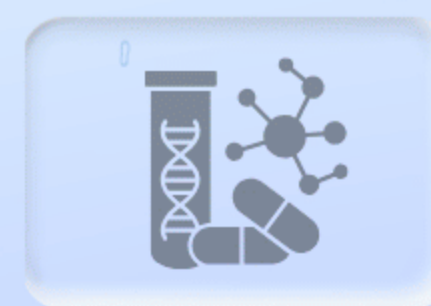
Fastest-growing
pharma market in
Central Asia.



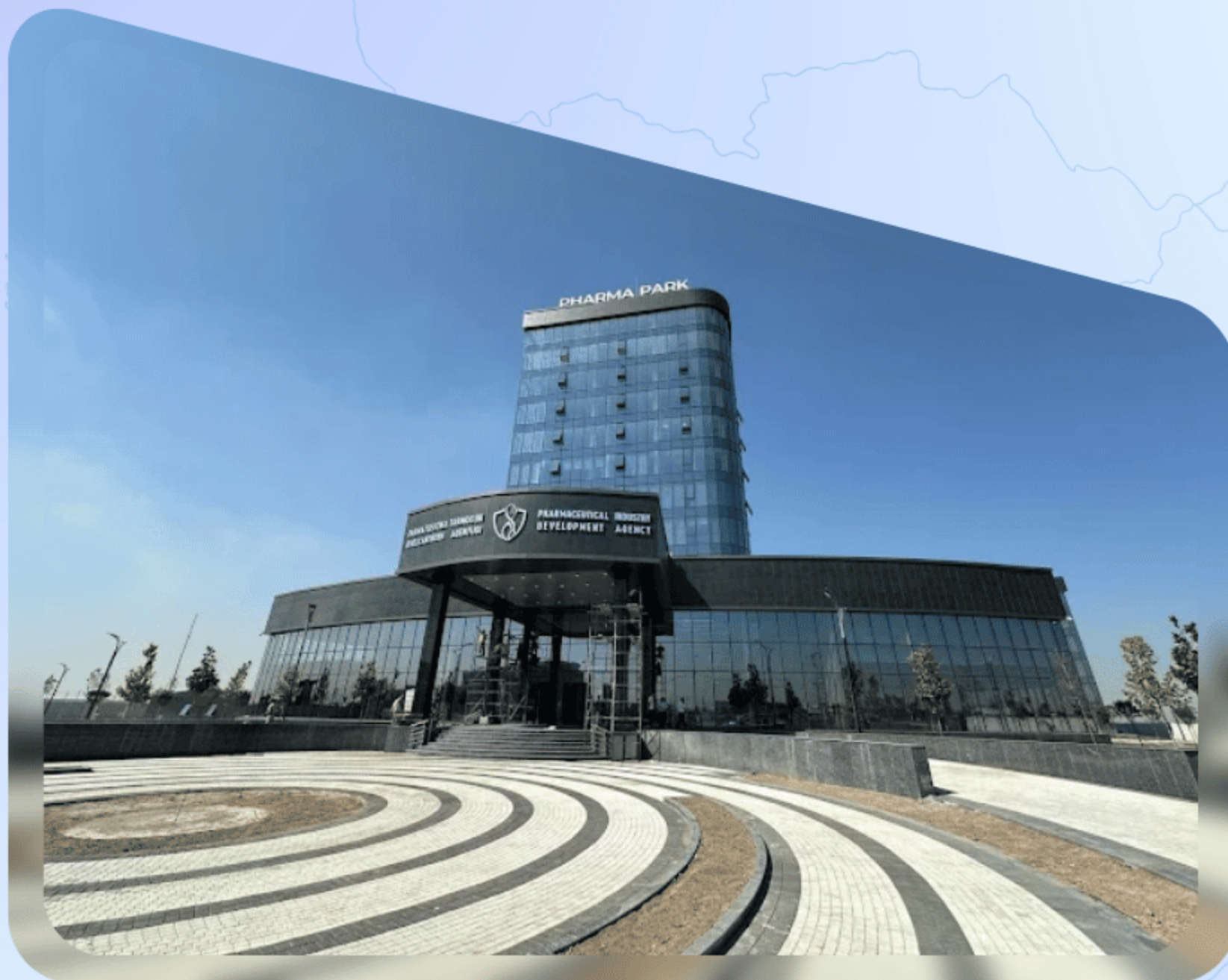
Tax holidays,
100% repatriation
of profits, pharma
free zones.



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.

The background of the slide is a dark blue-grey gradient. It features a stylized globe in the upper right corner, showing continents in a reddish-brown hue. Overlaid on the globe and the background are several data visualization elements: a line graph with a jagged, fluctuating line in a light blue color, and a bar chart with three prominent blue bars of increasing height. Faint, light blue text and grid lines are visible across the background, including the words 'Finance Analysis' and various numbers like '2.5', '2.0', '1.5', '1.0', '0.5', and years like '2015', '2016', '2017', '2018', '2019'.

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**

**STRATEGIC
ADVANTAGE OF
EXHIBITING
AT PHARMA
EURASIA**

**Early access to
growing CIS
markets**

**High-level
visibility with key
stakeholders**

**Market
intelligence and
regulatory
contacts**

**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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CONTACT & INFORMATION :



info@pharmedxworld.com



www.pharmedxworld.com