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Market analysis of veterinary medicines for dogs

Anastasiia G. Kolycheva[1], Andrey A. Rudenko[2], Marina I. Shopinskaya[1]

[1]RUDN University, *Moscow, Russian Federation*
[2]BIOTECH University, *Moscow, Russian Federation*
✉ 1142240374@pfur.ru

Abstract. Medicinal products intended for dogs were studied. According to the statistics of the All-Russian Public Opinion Research Center[1], every third family in Russia has a dog. In this regard, maintaining the health of dogs is of great importance both from a psychological and social perspective. The current state of the Russian veterinary market is characterized by a reduction in the number of foreign suppliers. For example, in 2017, there were 867 veterinary drugs of foreign origin in Russia, of which approximately 180 items remained in market, but this number tend to decrease. The shares of foreign and Russian drugs presented in the Russian market are approximately equal, which indicates a great dependence on foreign suppliers. At the same time, many veterinarians prefer to use foreign drugs as the most effective and safe. However, Russian drugs recently appear in the Russian market are corresponding in quality to foreign analogues. Nowadays, they should form the basis for import substitution. The priority for import substitution should be drugs for the treatment of the most common and deadly diseases of dogs, the list of which is established by the national standard of the Russian Federation (GOST R 70040–2022)[2]. According to the list, 35 of the most common diseases in practice were identified for 10 organs and systems of dogs. The method of grading the medicinal products quality previously developed by the authors was used to select medicinal products by a treatment way. As a result, 353 drugs were selected, including 178 foreign and 175 Russian products. It was established that the supply of foreign drugs by the origin of medicines comprises 34 foreign countries, including 8 friendly and 26 unfriendly. At the same time, 148 drugs are supplied from unfriendly countries, and only 30 from friendly ones. The current trend of reducing supplies from unfriendly countries poses a threat of a shortage of medicines to Russia.

Keywords: dogs, veterinary drugs, import substitution, quality of medicines, quality assessment system

[1] Russian Public Opinion Research Center (VCIOM). URL: https://wciom.ru/analytical-reviews/analiticheskii-obzor/publichnaja-zhizn-domashnikh-zhivotnykh (date of access: 29.06.2025).
[2] GOST R 70040–2022. National Standard of the Russian Federation "Classification of animal diseases of the canine and feline families". Moscow, 2022.

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Introduction

Due to the sanctions policy of unfriendly countries, our country is acutely pressed by the foreign veterinary medicines scarcity: since the spring 2022, the supply of drugs has sharply decreased. Thus, approximately 180 foreign drugs remained for sale in the Russian market out of the 847 items approved by the Russian Federal Service for Veterinary and Phytosanitary Surveillance in 2017, however, this number tend to decrease [1]. Replacing foreign drugs with similar and more advanced ones is an important task of veterinary science. To solve this problem, it is necessary to accurately assess the quality of drugs of foreign manufacturers and compare these indicators with Russian analogues [2, 3]. It will allow to establish a list of Russian drugs that correspond to the world level, to determine the required volumes of their production, to identify «blank areas» in the provision of dogs with drugs[3].

The shortage of foreign veterinary medicinal products has spurred the increase of national production. Thus, the volume of the Russian drugs market in 2023 increased by 25% and amounted to 76.2 billion rubles, which is 1.5 times more than a year earlier. New 218 veterinary drugs were registered in Russia in 2021–2024 [4, 5]. However, not all drugs satisfy the world level of quality. There are cases of withdrawal of new drugs from the market [6]. One of the reasons for the appearance of low-quality products is the decision on accelerated registration of medicines, established by Federal Law No. 171-FZ of April 28, 2023 "On Amendments to the Federal Law 'On Medicine Circulation'"[4].

In fact, the process of import substitution has already been launched. Its basis is in the production of medicines that meet the most urgent needs of the market.

The variety of drugs (about 2,500 items) of Russian and foreign origin poses a choice problem for veterinarians[5]. More often, veterinarians recommend foreign drugs, but they are several times more expensive than Russian ones and can be unaffordable for animal owners. Veterinarians and dog owners should be aware of the appropriate information to

[3] State Register of Veterinary Medicinal Products for in Russia. URL: https://galen.vetrf.ru on& (date of access: 30.01.2025).
[4] Federal Law No. 171-FZ "On Amendments to the Federal Law 'On Medicine Circulation'" of April 28, 2023 (latest version).
[5] List of Essential Medicines for Cats and Dogs // World Association of Small Animal Veterinarians (WSAVA). 2020. P. 24 URL: https://wsava.org/wp-content uploads/2021/09/WSAVA-List-of-Essential-Medicines-for-Cats-and-Dogs-Russian.pdf (date of access: 28.01.2025).

prescribe the drug on a price-quality basis. To date, such information is not systemically available [7, 8].

The aim of the study is to determine the nomenclature of Russian veterinary medicinal products for dogs corresponding to the world level of quality for import substitution of foreign-made analogues.

Materials and Methods

The studies were carried out since 2023 at the Vetpolis clinic (Moscow) and the Department of Veterinary Medicine of RUDN University. Other veterinary institutions and higher educational institutions of the country were involved in the collection of statistical information through questionnaires.

Statistical data processing was carried out using the mathematical apparatus of the ranking theory [9].

The scientific works from the RUDN University Library, articles from scientific journals and collections from 2021 to 2025, which considered the issues of determining the quality and import substitution of veterinary drugs, were studied. Methods of synthesis, analysis, generalization, a priori ranking were used.

Results and Discussion

The drug choice for dogs from the entire set of veterinary drugs (about 2,500 items) is based on the need to treat the most common diseases. The list of such diseases is established by the national standard of the Russian Federation (GOST R 70040–2022)[6] and clarified by statistical processing of the animal registry of the Vetpolis clinic. As a result, 35 diseases were identified in 10 organs and systems of dogs, with which the owners most often contact the veterinary clinic (Table 1).

Table 1

The most common diseases of dogs

No.	Organs and Systems	Diseases	Incidence, %
1	Heart disease	1.1. Arrhythmia 1.2. Heart failure 1.3. Cardiovascular 1.4. Parasitic heart diseases (dirofilariasis, angiostrongylosis)	8
2	Respiratory diseases	2.1. Rhinitis 2.2. Laryngitis 2.3. Bronchitis 2.4. Pneumonia	5

[6] GOST R 70040–2022. National Standard of the Russian Federation "Classification of animal diseases of the canine and feline families". Moscow, 2022.

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No.	Organs and Systems	Diseases	Incidence, %
3	Dermatological diseases	3.1. Bacterial diseases 3.2. Fungal diseases 3.3. Parasitic diseases 3.4. Skin diseases caused by hypersensitivity 3.5. Autoimmune and immune-mediated diseases	10
4	Infectious diseases	4.1. Rabies 4.2. Distemper 4.3. Parainfluenza (kennel cough) 4.4. Leptospirosis 4.5. Bordetellosis	5
5	Diseases of the hearing system	5.1. Lesion of the ear canal by ticks and parasites 5.2. Allergic otitis 5.3. Bacterial otitis 5.4. Fungal otitis	9
6	Digestive tract diseases	6.1. Oral diseases 6.2. Diseases of the stomach and pancreas 6.3. Intestinal diseases 6.4 Anal and Perianal Diseases	15
7	Diseases of the liver and biliary tract	7.1. Hepatosis 7.2. Cholecystitis	8
8	Kidney and urinary tract diseases	8.1. Cystitis 8.2. Urolithiasis 8.3. Chronic renal failure (CRF)	15
9	Endocrine disorders	9.1. Diabetes mellitus 9.2. Hypo- and hyperthyroidism	7
10	Oncology	10.1. Carcinoma 10.2. Sarcoma	18

Source: compiled by A.G. Kolycheva, A.A. Rudenko.

As shown in Table 1, most often owners of dogs with cancer (18%), diseases of the digestive tract (15%), kidneys and urinary tract (15%) visit veterinary clinics.

The list of the most common diseases established in Table 1, is accepted as a pharmacotherapeutic classifier of medicinal products. Thus, 353 drugs were selected for further study out of the 847 names of veterinary medicinal products for pets approved by the Russian Federal Service for Veterinary and Phytosanitary Surveillance (Rosselkhoznadzor): 178 foreign and 175 Russian drugs. The number of drugs of foreign and Russian origin is approximately equal. This indicates a high dependence (50%) of the Russian market of veterinary drugs on foreign suppliers.

The distribution of suppliers by countries of manufacture of foreign medicines is shown in Table 2.

Table 2

Countries of foreign medicines origin

No.	Country of origin	Number of drugs, units
1	Portugal	2
2	Italy	17
3	India	9
4	China	3
5	France	20
6	Latvia	6
7	The Netherlands	11
8	Hungary	3
9	Sweden	2
10	United Kingdom	4
11	Israel	2
12	Croatia	2
13	Germany	27
14	Spain	4
15	UAE	1
16	Slovenia	6
17	Turkey	2
18	USA	7
19	Belarus	4
20	Ukraine	3
21	Poland	3
22	Austria	3
23	Finland	3
24	Switzerland	1
25	Serbia	2
26	Montenegro	1
27	Czech Republic	3
28	Romania	4
29	Canada	1
30	Ireland	2
31	Mexico	1
32	Greece	1
33	Bulgaria	2
34	Belgium	2
Total	34	178

Source: compiled by A.G. Kolycheva, A.A. Rudenko.

Veterinary drugs are supplied to Russia by 34 foreign countries. The most active suppliers of drugs are Germany (27 items), France (20), Italy (17), the Netherlands (11). The smallest number of drugs comes from Mexico, Greece, Canada, Montenegro, Switzerland, UAE (one position from each country). Foreign suppliers can be from friendly and unfriendly countries (Fig. 1).

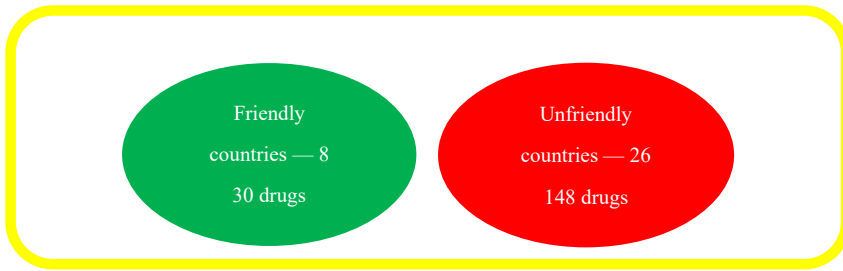

Fig. 1. Countries and number of drugs of foreign producers
Source: compiled by A.G. Kolycheva, A.A. Rudenko.

Eight friendly countries (Montenegro, Belarus, China, India, Slovenia, Serbia, Croatia, UAE) supply only 30 types of medicines to Russia. The absolute majority of supplies (148) are from 26 unfriendly countries, i.e. 5 times more than from friendly ones. The tendency to reduce the presence of suppliers from unfriendly countries poses a threat of shortage of certain types of medicines in the Russian market [10, 11].

The distribution of the amount of foreign and Russian drugs for the treatment of diseases of the systems and organs in dogs is shown in Fig. 2 and 3.

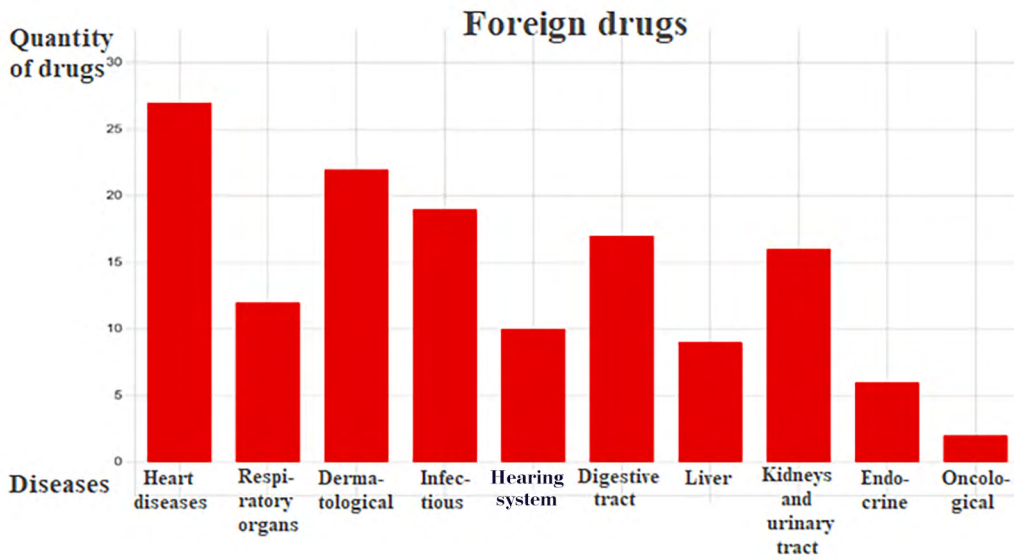

Fig. 2. Foreign drugs for the treatment of diseases of the systems and organs in dogs
Source: compiled by A.G. Kolycheva, A.A. Rudenko.

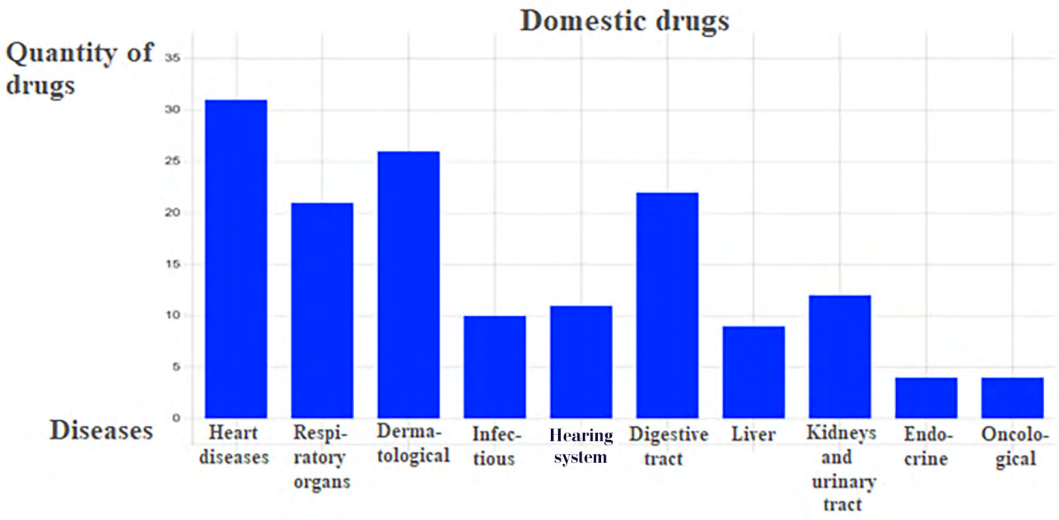

Fig. 3. Russian drugs for the treatment of diseases of the systems and organs in dogs
Source: compiled by A.G. Kolycheva, A.A. Rudenko.

There is a certain parity of foreign and Russian drugs for most diseases (see Fig. 2 and 3). The largest number of drugs are created for the treatment of heart diseases (29 foreign and 31 Russian), the digestive tract (22 and 26, respectively), dermatological diseases (22 and 26), kidneys and urinary tract (16 and 12). There are not enough drugs for the treatment of endocrine and oncological diseases. For almost every disease, the number of Russian drugs allows replacing foreign analogues. But will such a replacement ensure the preservation of the quality of the treatment process, will the volume of Russian production be enough to cover the needs for drugs?

A wide range of medicines produced both in the Russian Federation and abroad poses a challenge to veterinary specialists to make a qualified choice. Many factors must be considered in the decision-making process, including their own professional competencies, clinical observations, recommendations on drug administration, as well as information obtained from open sources, such as specialized literature, scientific publications and reference materials.

The medicinal market is characterized by significant price fluctuations, which for different drugs of the same purpose (therapeutically equivalent) can range from tens to several thousand rubles. For example, the drug for the treatment of heart failure Vetmedin costs about 4000 rubles, and Pimocardin — only 2000 rubles [12, 13]. Although the price does matter, it should play a secondary role when choosing a drug.

The task of choosing is complicated by the constantly changing range of drugs. On the one hand, the government, seeking to solve the problem of import substitution after the withdrawal of some foreign manufacturers from the market, created conditions for the

rapid registration of new drugs and generics[7]. On the other hand, Russian manufacturers are increasing the production and sale of their own veterinary medicines, but the quality issues of Russian drugs remain relevant.

By quality, veterinary specialists understand the effectiveness and safety of drugs. Effectiveness is the ability of a drug to have the maximum possible positive effect on health. Safety is the absence of risk of harm to health, the development of undesirable side effects. Thus, the quality of drugs is a synthesis of two phenomena that cannot be unambiguously assessed through quantitative indicators [14, 15]. In science, the method of a priori ranking is used to study such phenomena [9]. This method makes it possible to translate the subjective assessments of specialists (experts) by applying a special processing mechanism into an objective assessment of phenomena with a high degree of reliability.

In a previously published study, a special technique was developed to implement the a priori ranking method [16]. The assessment of the quality of drugs is provided separately for each disease in dogs (see Table 1). The quality of each drug (foreign and Russian) for a particular disease treatment is assessed by a scoring system, according to the following scale:

100 — complete recovery, no side effects are observed;
80 — follow-up is required, side effects are possible;
60 — recovery is slow (more than 10–15 days);
40 — the recovery process is mild, constant medication is required;
20 — no recovery or deterioration of the condition is observed;
0 — negative effect on health.

As a result of data processing according to this technique, a histogram is constructed. It gives a visual representation of the quality level of each drug used to treat a particular disease in dogs. For example, a histogram of the quality of 10 drugs for the treatment of heart failure is given: 6 foreign — Fortecor (France), PimoPet GIGI (Latvia), Vasotop (Netherlands), Vetmedin (Hungary), Cardalis (France), ApCard (France) and 4 Russian — Zoocard, Mexitar, Vasosan, Pimocardin (Fig. 4). The selection of these drugs was made based on the State Register of Medicinal Products for Veterinary Use[8]. Prices of drugs are taken at average market values based on an electronic catalog[9]. The histogram arranges foreign and Russian drugs in descending order of their quality level. Information on the prices of these drugs is presented in the histogram by points connected by straight lines. The combined graph (Fig. 4) provides comprehensive information on the cost and quality of drugs intended for the treatment of one disease. This allows veterinarians and dog owners to choose the most appropriate treatment option, guided by the principle of "price-quality".

[7] Order dated March 6, 2018 No. 101 On approval of the rules for conducting a preclinical study of a veterinary medicinal product, a clinical study of a veterinary medicinal product, a bioequivalence study of a medicinal product for veterinary use. URL: https://www.garant.ru /products/ipo/prime/doc/71802576/?ysclid=lpi26uxscn 977807832 (date of access: 31.01.2025).
[8] State Register of Veterinary Medicinal Products for in Russia. URL: https://fsvps.gov.ru/files/gosudarstvennyj-reestr-lekarstvennyh-sredstv-dlja-veterinarnogo-primenenija-perechen-lekarstvennyh-preparatov-proshedshih-gosudarstvennuju-registraciju/ (date of access: 30.01.2025
[9] Catalog of veterinary drugs (Agrovetzashchita). URL: https://avzvet.ru/ (date of access: 31.01.2025).

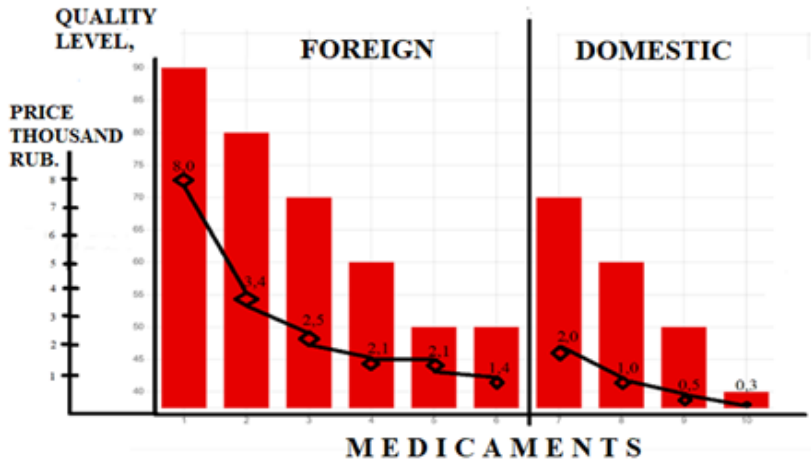

Fig. 4. Drugs for the treatment of heart failure. Names of drugs: 1 — Vetmedin; 2 — Pimopet GIGI; 3 — Fortecor; 4 — Vasotope; 5 — Cardalis; 6 — ApCard; 7 — Pimocardin; 8 — Vasosan; 9 — Zoocardium; 10 — Mexitar

Source: compiled by A.G. Kolycheva, A.A. Rudenko.

Conclusion

The decrease in the availability of foreign veterinary drugs in Russia is caused by political events, as well as the tightening of the rules of the Federal Service for Veterinary and Phytosanitary Supervision (Rosselkhoznadzor) for their promotion in the Russian market. Now it is important to start working in advance to replace foreign drugs with Russian ones, ensuring their quality and availability corresponding to the world level. The prices for foreign drugs can significantly exceed the prices of Russian counterparts, and the question of the quality of Russian drugs remains open.

Highly qualified specialists from the veterinary community were involved in assessing the quality of drugs. They evaluated each drug according to the previously developed scoring system. As a result of subsequent data processing according to the a priori ranking technique, objective assessments of each veterinary drug quality for the most common diseases in dogs' treatment were obtained. To visualize the level of quality of drugs, histograms indicating the cost of drugs are built and grouped by the most common diseases, which will allow veterinarians, as well as dog owners, to choose the best treatment option, considering the price-quality ratio.

The conducted research opens prospects for further research aimed at developing recommendations for the replacement of imported veterinary drugs for dogs in the Russian market.

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About the authors:
Kolycheva Anastasiia Georgievna — Postgraduate student at the Agrarian and Technological Institute, RUDN University, 6 Miklukho-Maklaya st., Moscow, 117198, Russian Federation; e-mail: 1142240374@pfur.ru
ORCID: 0009-0002-9131-9633
Rudenko Andrey Anatolyevich — Doctor of Veterinary Sciences, Associate Professor, Professor of the Department of Veterinary Medicine, Russian State Budgetary Educational Institution of Higher Education, Russian Biotechnological University, 11 Volokolamsk Highway, Moscow, 125080, Russian Federation; e-mail: rudenkoaa@mgupp.ru
ORCID: 0000-0002-6434-3497 SPIN-code: 6403-6832
Shopinskaya Marina Ivanovna — Candidate of Veterinary Sciences, Associate Professor of the Department of Veterinary Medicine, RUDN University, 6 Miklukho-Maklaya st., Moscow, 117198, Russian Federation; e-mail: shopinskaya-mi@rudn.ru
ORCID: 0000-0002-3823-3737 SPIN-code: 2550-4781

Анализ рынка ветеринарных лекарственных препаратов для собак

А.Г. Колычева[1], А.А. Руденко[2], М.И. Шопинская[1]

[1]Российский университет дружбы народов, *г. Москва, Российская Федерация*
[2]Российский биотехнологический университет (РОСБИОТЕХ), *г. Москва, Российская Федерация*
✉ 1142240374@pfur.ru

Аннотация. В рамках исследования рассмотрены лекарственные препараты, предназначенные для собак. Согласно статистике Всероссийского центра изучения общественного мнения[10], каждая третья семья в России имеет собаку. В связи с этим поддержание здоровья собак приобретает большое значение как с психологической, так и с социальной точки зрения. Текущее состояние российского рынка ветеринарных препаратов характеризуется сокращением числа зарубежных поставщиков. Так, в 2017 г. в России насчитывалось 867 ветеринарных препаратов зарубежного производства, из них осталось около 180 наименований, но и они имеют тенденцию к сокращению. Доли препаратов иностранного и российского производства на российском рынке примерно равны, что свидетельствует о большой зависимости от зарубежных поставщиков. При этом многие ветеринарные врачи предпочитают использовать лекарственные препараты зарубежного производства как наиболее эффективные и безопасные. Но на российском рынке за последнее время появляются лекарственные препараты российского производства, соответствующие по качеству зарубежным аналогам. Сегодня они должны составлять основу импортозамещения. Первоочередными на импортозамещение должны стать препараты для лечения наиболее распространенных и смертельно опасных заболеваний собак, перечень которых установлен национальным стандартом Российской Федерации (ГОСТ Р 70040–2022)[11]. Из данного перечня выявлены 35 наиболее часто встречаемых в практике заболеваний по 10 органам и системам собак. При отборе лекарственных препаратов по их лечению использована разработанная авторами ранее методика балльной оценки качества лекарственных средств. В результате отобраны 353 препарата, в т.ч. 178 зарубежного и 175 российского производства. Исследуя происхождение лекарственных препаратов установлено, что поставки зарубежных препаратов осуществляют 34 иностранных государства, в т.ч. 8 дружественных и 26 недружественных. При этом из недружественных стран поставляется 148 наименований препаратов, а из дружественных — всего 30.

[10] Всероссийский центр изучения общественного мнения (ВЦИОМ). Режим доступа: https://wciom.ru/analytical-reviews/analiticheskii-obzor/publichnaja-zhizn-domashnikh-zhivotnykh (дата обращения: 29.06.2025).
[11] ГОСТ Р 70040–2022. Национальный стандарт Российской Федерации «Классификация болезней животных семейств псовых и кошачьих». М., 2022.

Существующая тенденция сокращения поставок из недружественных стран создает для России угрозу дефицита лекарственных препаратов.

Ключевые слова: собаки, ветеринарные препараты, импортозамещение, качество лекарственных средств, система оценки качества

Вклад авторов: Колычева А.Г. — внесла существенный вклад в написание статьи, собрала и проанализировала информацию, интерпретировала результаты исследования; Шопинская М.И. — принимала участие в составлении литературного обзора, работа над таблицами и рисунками; Руденко А.А. — разработка концепции научного исследования, корректура текста публикации.

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