

“Pharmaceutical Distribution in Europe: The Emergence of Direct-to-Pharmacy Supply”

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"Each day millions of patients across Europe rely on the supply chain to deliver the medicines they need"

Pharmaceutical Distribution in Europe - The Emergence of Direct-to-Pharmacy Supply is a market report that comprehensively reviews the business of medicines distribution in Europe.

The traditional model of pharmaceutical supply chain in Europe is under threat as major pharmaceutical manufacturers in the UK attempt to change the way they distribute their products. The adoption of a Direct-to-pharmacy (DTP) model by some of the industry's most powerful players in the UK signifies a new trend that could spread across Europe.

REPORT STRUCTURE

The report is logically divided into four chapters.

Chapter 1 provides a comprehensive history and overview of the key issues related to the pharmaceutical supply chain in Europe, including European law, parallel trade and the recent EU enlargement.

Chapter 2 fully reviews the role of pharmaceutical wholesale companies. Issues tackled include regulations, technologies used, plus reviews of the major players such as Celesio, Phoenix Group and OPG and the market in France, Germany, Italy and the UK.

Chapter 3 discusses how pharmaceutical manufacturers organise the distribution of their products. The current vogue for direct-to-pharmacy is analysed, as is reaction to the UK's OFT report. Recent changes by major manufacturers to their supply chain are summarised.

Chapter 4 looks at the pressures that the pharmacy sector is under. Liberalisation still in its infancy in some countries and pharmacists are being encouraged to expand their role beyond just dispensing. Changes to the supply chain could have a profound effect on established business models.

The report provides an objective perspective on important industry questions, such as:

- Will direct-to-pharmacy become the dominant method of drug distribution
- Do pharmacists have a future beyond the administration of dispensing?
- Are counterfeit medicines now a major issue that the industry has to deal with?
- What is the current thinking on the role of parallel trade in the European market?



Key features of the report include:

- Contains 20 Case studies including these companies, Bayer, DocMorris, Galenica, IBS, Novartis, Phoenix and Pfizer
- Unbiased synopsis of the UK's Office of Fair Trading's (OFT) report into the medicines' supply chain
- Overview of the European pharmaceutical supply chain and the stakeholders involved in medicines distribution
- Insight into the aggressive Pan-European expansion strategies of some wholesalers
- Summary of regulations governing pharmaceutical wholesaling and pharmacy

With 14 Tables and 26 Figures this report is essential reading for anyone working in the pharmaceuticals supply chain including manufacturers, wholesalers, distributors and pharmacists.

Companies and organisations mentioned in the report include:

3i, Alliance Unichem, Amedis UE AG, Apteka, Associazione Distributori Farmaceutici, Astellas Pharma, AstraZeneca, Authentix, Azienda Speciale Farmacie Comunali Riunite, Bayer, British Association of Pharmaceutical Wholesalers, Celesio AG, Chambre Syndicale de la Repartition Pharmaceutique, Chiron, Dainippon Sumitomo Pharma, Der Bundesverband des Pharmazeutischen Großhandels, DocMorris, EAEP, Eli Lilly, Europharm, Farmaceutica Bolognese, Farmacija d.d, FDA, Galenica Group, Galexis, GEHE Pharma Handel, Groupement International de la Repartition Pharmaceutique, HgCapita, Independent Pharmacy Federation, International Pharmaceutical Excipients Council, Itriafarma, Mediceo Paltac Holdings, Medifarm Velebit, MediService, Merck, Neuhaus Partners, Norsk Medisinaldepot, Novartis, OPG Group, Pfizer, Pharmexx, PhRMA, PHOENIX group, Plus Pharmacie, Retail Working Group, Sanofi-Aventis, Surgency, Syncra Systems, Takeda, Tamro, Unione Farmaceutica, Viafarma, Voigt AG

USE THIS REPORT TO:

- Identify key areas that will change in the pharmaceutical market structure over the next five years.
- Support internal planning and decision-making with an external perspective founded on detailed analysis and transparent market forecasts.
- Understand how the regulatory environment could change to reflect new business models.

EXECUTIVE SUMMARY

Chapter 1: The Nature of the European Pharmaceutical Supply Chain

- The pharmaceutical supply chain
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Dr Faiz Kermani has 15 years' experience in both academia and the pharmaceutical industry. He has worked in pharmaceutical R&D, pricing and reimbursement, marketing and medical education. Dr Kermani holds a PhD in Immunopharmacology from St. Thomas' Hospital, London, and a First Class Honours degree in Pharmacology with Toxicology from King's College, London. He has written extensively on international healthcare issues, and is on the editorial board of a number of publications. In March 2006, he was a delegate on the UK Government's Trade and Investment Biotech Scoping Mission to China and contributed to the subsequent report.



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