

Dynamics in the EU market

Rory W. O'Riordan MPSI, MMII
Vice-President, Stada AG

Market Dynamics in EU

- Introduction
- Status Quo
- Manufacturing
- Distribution
- Retailing
- Reimbursement
- Competition

Manufacturing Dynamics

- Focus on core competencies.
- Focus on efficiencies.(Batch, yield, packing, rework).
- Right first time.
- Automation.

Distribution Dynamics

- Consolidation.
- Regional giants.
- Forward integration.
- Preferred generic suppliers.
- Virtual generic companies.

Retailing Dynamics

- Change of ownership regulations.
- Pharmacy chains (DocMorris)
- Substitution policies.
- Attitudinal change.

Reimbursement Dynamics

- Inter-linkage of countries.
- HealthTechnology Assessments.
- Reference groups.
- Tenders in branded markets.
- Insurers becoming active purchasers.

Political Dynamics

- Sustainability.
- Shift back to R&D sector.
- Competition Authority.
- Biogenerics.
- Compliance vs competition.

Market Trends

- Outsource manufacture
- Backward integration.
- Therapy Focus.
- Commoditise.
- Consolidation.
- Niche generics.
- Value-added products.

Business responses

- Cost control.
- Consolidate.
- Product rationalisation.
- Broader geographical reach.
- East-West partnerships.

Thank you

Any questions?