ABOUT DAFSA

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For more information, please contact:

- **Sandra Gandhi Emi Murata**
  Business Development Executive
  Global Insight
  +44 (0)20.7452.5629
  sandrine.gandhi@globalinsight.com

- **Emi Murata**
  Business Development Executive
  Global Insight
  +44 (0)20.7452.5107
  emi.murata@globalinsight.com

THE POWER OF PERSPECTIVE

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CONTACT US

<table>
<thead>
<tr>
<th>CONTACT US</th>
<th>Web: <a href="http://www.globalinsight.com">www.globalinsight.com</a></th>
<th>E-mail: <a href="mailto:info@globalinsight.com">info@globalinsight.com</a></th>
</tr>
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<tbody>
<tr>
<td>NORTH AMERICA</td>
<td>U.S./Canada: 1.800.913.3374</td>
<td>Mexico: 1.800.687.2585</td>
</tr>
<tr>
<td>EUROPE</td>
<td>Frankfurt: +49 (0)69.20973.0</td>
<td>London: +44 (0)20.7452.5000</td>
</tr>
<tr>
<td>MIDDLE EAST</td>
<td>Pretoria: +27 (0)12.695.5420</td>
<td>Milan: +39 02.86481.1</td>
</tr>
<tr>
<td>AFRICA</td>
<td>Africa: +27 (0)12.695.5420</td>
<td>London: +44 (0)20.7452.5000</td>
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<td>ASIA</td>
<td>Beijing: +86 10.5907.0689</td>
<td>Gurgaon: +91 (0) 9910452665</td>
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<td>Shanghai: +86 21.5228.1470</td>
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<td>Tokyo: +81 (0)3.5729.1314</td>
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DIRECT-TO-PHARMACY DISTRIBUTION: MANAGING RELATIONSHIPS IN 12 EUROPEAN MARKETS

**CONTEXT OF THE REPORT**
This study is designed for healthcare professionals seeking to develop strategies for distribution of drugs throughout pharmacies in Europe. The report includes analyses of 12 European countries: Belgium, France, Germany, Greece, Hungary, Italy, the Netherlands, Poland, Portugal, Spain, Sweden, and the United Kingdom.

Our in-depth study, “Direct Relationship with Pharmacies throughout 12 European Markets”:
- Investigates retail markets, including networks, segmentations, margins, and regulation
- Analyzes positioning of key players (consignees, wholesalers, parallel traders, pharmacy purchasing groups, as well as e-commerce and mail order pharmacies) at local and Pan-European levels
- Provides up-to-date analysis of the impact of new regulation on pharmacies throughout Europe
- Examines current and future purchasing and marketing habits based on extensive interviews with pharmacists
- Explores projected trends for pharmacy markets over the next five years

**OBJECTIVES OF THE REPORT**
Forecasting the direct relationship to pharmacies on both local and Pan-European levels
- Overview of the drug distribution flow and the supply chain organization in each of the 12 European countries with respect to each category of drugs:
  - Prescription drugs
  - Parallel imports and locally sourced drugs
  - Generic prescription drugs
  - Over-the-counter drugs
- Trends and ambitions of key players involved in direct sales to pharmacy promotion and sales
- A medium-term outlook for European pharmaceutical distribution for each kind of products

Optimising your distribution and supply chain strategy for each drug type
- Analysis of purchasing behaviour and expectations of pharmacists
- Screening of key players’ positioning (distribution range, service offerings, communication, financial situations)
- Assessment of the key factors that successfully increase direct relationships with pharmacies

**METHODOLOGY**
Primary research
- Over 100 interviews with pharmacists and stakeholders, including national associations of pharmacists and wholesalers (e.g., BAPW in the United Kingdom and CSRP in France)
- Fifteen interviews with leading Pan-European and local wholesalers and consignees, parallel traders, purchasing pharmacy groups, and mail order pharmacies
- Five interviews with industry supply chain managers and experts
- The interview guides are validated by our clients

Secondary research
Extensive research based on secondary sources and data on each country about pharmacies, wholesaling, and parallel trade (qualitative and quantitative data).

**DELIVERABLES**
- Easy-to-access electronic report containing analysis of 12 countries (Microsoft Word, approximately 200 pages)
- Comparative analysis (Microsoft PowerPoint, approximately 50 slides)

**TABLE OF CONTENTS PER COUNTRY**
- Overview of the current pharmaceutical distribution system
  - Networks of pharmacies
  - Segmentations of pharmacies (location, regional implantation, size, and independent and chain pharmacies)
  - Distribution flows
  - Role of parallel trade
  - Legal and regulatory framework of direct promotion and sales
  - Margin systems and taxes relative to direct sales
- Examples of price differentials between:
  - Generic and branded drugs
  - Parallel imports and locally sourced drugs
  - Direct promotion and selling practices to pharmacies by drug type
  - Range of drugs promoted per pharmaceutical companies
  - Services provided to pharmacists (manufacturers, wholesalers, pharmacy purchasing groups)
  - Detailed profiles of the main Pan-European and local operators of pharmaceutical distribution
  - Partnerships with pharmacy purchasing groups in terms of communication, promotion, sales, and supply of every drug type to pharmacists
  - Medium-term outlook for pharmaceutical distribution
  - Direct sales to pharmacy and over-the-counter drugs, and the effect of market entry of new operators
  - The expectation of dispensing pharmacists
  - Drivers and inhibitors of direct promotion and sales to pharmacies
  - Strategies developed by pharmaceutical companies
  - Promoting and purchasing behaviour in European retail markets and potential legal situations
  - Strategic points for direct-to-pharmacy promotion and sales
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Milan: +39 02.9647.1  
Paris: +33 (0)1.59.45.2600 |
| **AFRICA**  
 Pretoria: +27 (0)12.695.5420 |
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London: +44 (0)20.7452.5000 |
| **ASIA**  
Beijing: +86 10.5907.0689  
Gurgaon: +91 (0) 9910452605 |
| **MIDDLE EAST**  
Shanghai: +86 21.5228.1470  
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| **Tokyo**  
+81 (0)3.5219.1314 |

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Managing relationships between pharmacists and the various sectors within the pharmaceutical industry is proving to be a major challenge. The problems are fuelled by constant development and changes — these include parallel trade and generics expansion, the emergence of online commerce, the rise of new distribution players, and the increasing integration of the supply chain by wholesalers. It is important that the pharmaceutical industry establishes close and efficient relationships with pharmacists.

Analyzing the relationships between the various sectors within the pharmaceutical industry and the pharmacies are essential for developing strategies of drug distribution. This report will focus on the relationships between the various sectors of the pharmaceutical industry and the pharmacists, including their communication and sales process.