ABOUT DAFSA

DAFSA, a Global Insight company, focuses on primary market research in France and Europe. With 20 consultants leveraging years of expertise in verticals such as pharmaceuticals, financial services, and telecommunications, we are able to provide a wide range of customized research, as well as multi-client industry reports, for the French and European markets.

DAFSA's Health Department has been providing expert analysis on pharmaceutical industry and health policies for more than 10 years. Our previous European surveys, *Biosimilars in Europe, Successfully Developing Pharmaceuticals for European Markets*, and *Pharmaceutical Parallel Trade in Europe*, are unique in their comprehensive coverage and focus on cross-country comparative analysis. DAFSA's other health and pharmaceuticals products and services include:

- **Multi-Client Studies and Market Research**
  Focusing on the French and European markets, DAFSA applies a tailor-made methodology adapted to the deliverables of each project, using marketing tools such as B2B interviews, consumer and B2B surveys (phone, face to face, or Internet based), panels, and “mystery shopping.”

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- **Drug Prescription and Retailing Behaviors**
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DAFSA is a member of SYNTES 'Etudes Marketing et Opinion,' which guarantees the respect of professional deontological rules, particularly the international code of practice CCI-ESOMAR.

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A SURVEY OF THE EUROPEAN HOSPITAL DRUG MARKET

An in-depth look at the European hospital drug market: this report reveals and analyzes the significant changes that hospitals throughout Europe are undergoing. The changes can largely be attributed to hospitals being unprepared for an aging population and rising demand for the development of new drugs, both of which contribute to an increase in health expenditure.
OBJECTIVES AND CONTEXT OF THE REPORT

This study is designed for healthcare industry professionals seeking to develop strategies for distribution of drugs throughout hospitals in Europe. The report includes analyses of 12 European countries: Belgium, Czech Republic, France, Germany, Italy, Netherlands, Poland, Portugal, Spain, Sweden, Switzerland, and the United Kingdom.

Our in-depth study, “A Survey of the European Hospital Drug Market”:  
- Investigates hospital markets, including network, distribution, financing, regulation, and market size;  
- Analyzes hospital drug markets, such as approval, pricing, reimbursement, listing, purchasing, expenses, and delivery to out-patients;  
- Provides up-to-date analysis of the impact of new legislation on hospitals throughout Europe;  
- Examines purchasing habits based on extensive interviews with pharmacists in hospitals; and  
- Explores projected trends for hospital markets over the next five years.

Study objectives include:  
- Detailing the regulatory framework for hospitals in each country and at the European level;  
- Comparing hospital financing and policies, drugs pricing and reimbursement systems, and drug policies;  
- Identifying drivers and problems related to approval, pricing, purchasing, and financing of hospital drugs; and  
- Assessing the potential development of hospital markets and the key success factors.

METHODOLOGY

Primary research  
- Over 100 interviews with hospital pharmacists and stakeholders (national competent marketing authorization authorities; evaluation, pricing, and reimbursement authorities; representatives of industry; and health ministries).  
- Telephone interviews lasting approximately 30 minutes  
- Details and validation by e-mail  
- Price analysis of innovative hospital drugs: average factory prices of approximately 100 drugs in France, Germany, Spain, Italy, and the United Kingdom. Prices are extracted from our drug pricing database, POLI®.

Secondary research  
- Extensive research based on secondary sources and data on each country about hospitals (qualitative and quantitative data).  
- In-depth analysis on national legal and regulatory frameworks, including marketing approval, pricing, and reimbursement.

Assessing information from:  
- Professional organizations such as health ministries and international and national associations of hospitals, including the European Hospital and Healthcare Federation.  
- Pharmaceutical papers such as Pharmaceutique in France and Farmacista in Italy.  
- Products and services from Global Insight’s Pharmaceutical and Healthcare Group.

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

Overview of the hospital market  
- Number of public and private hospitals  
- Regional organization  
- Number of beds per inhabitant  
- Hospital categorization  
- Hospital funding and the financial system  
- Hospital’s main expenses

Pharmaceuticals in hospitals  
- Drug expenses by therapeutic areas  
- Dispensing channels: drug delivery for in-patients and out-patients  
- Hospital drugs’ marketing approval  
- Hospital drugs’ pricing and reimbursement  
- Authorities involved in drug evaluation, pricing, and reimbursement  
- Process for drug evaluation, pricing, and reimbursement  
- Conditions for pharmaceutical reimbursements  
- Hospital drug purchasing policies  
- Key actors and their roles in hospitals’ drug choices  
- Criteria considered when selecting drugs  
- Hospital drug supply  
- Overall organization  
- Key players  
- Discounts

Latest and potential regulations and pricing and purchasing behavior in European hospital markets
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