



HEALTHCARE AND PHARMACEUTICAL MULTI-CLIENT STUDIES

IHS Global Insight's Multi-Client Studies (MCS) are designed to provide unique and in-depth insight to key questions and challenges facing the healthcare industry. The MCS employ a qualitative approach, including over 50 interviews per report conducted by local consultants with healthcare stakeholders from each country. MCS are fully customizable, allowing clients to validate and modify interview guidelines to accommodate specific business needs. The studies are enhanced by our healthcare and pharmaceutical team of experts and resources, providing a solid basis for analysis and forecasts.

Each Healthcare and Pharmaceutical MCS offers:

- An electronic report detailing the methodology of our research and results of our in-depth studies and interviews
- Comparative analysis presented in Microsoft PowerPoint® (approximately 50 slides)
- Detailed country profiles for each survey delivered in Microsoft Word® (approximately 20-30 pages)

The following is a list of available Healthcare and Pharmaceutical MCS:

- Healthcare Market Outlook: World Markets Healthcare Forecasts
- Dynamic Pharmaceutical Pricing: What's Really Behind Drug Price Changes?
- Maximizing Opportunities in the BRIC-MT Bloc: Market Access Strategies in the World's Fastest Growing Markets
- Business Opportunities in the Private Healthcare Sector
- Orphan and Ultra-Orphan Drugs: Attaching Value to Treatments for Rare Diseases
- Risk-Sharing Agreements: An Alternative Approach to Pricing Negotiations
- Biosimilars in Europe and the United States
- Theranostics: Insight into a New Medical Model
- Direct-to-Pharmacy Distribution: Managing Relationships in 12 European Markets
- A Survey of the European Hospital Drug Market
- Biosimilars in Europe, an Outlook
- Pharmaceutical Parallel Trade in Europe: A Medium-term Outlook
- European Policies for Medicine: Successfully Developing Pharmaceuticals in 15 European Markets



▶ **HEALTHCARE MARKET OUTLOOK: WORLD MARKETS HEALTHCARE FORECASTS**

(PUBLISHED: 2010)

IHS Global Insight's in-depth report provides healthcare forecasts, as well as analysis of the forecast determinants by country. Based on primary research with key stakeholders to understand the future drivers of market performance, the report explains how events such as price changes, new innovations, and regulatory reforms may impact sales and expenditure forecasts.

The study answers key questions such as:

- How is the general, global market outlook for healthcare developing?
- How are IHS Global Insight's healthcare forecasts for key markets—including emerging markets—developing?
- How can demographic indicators impact the outlook?
- How are ongoing reform agendas and cost containment policies impacting the forecasts?
- How will future generic penetration, patent expirations and biosimilars impact the forecasts?
- How will new technologies and emerging standards of care impact the forecasts?
- How will imports and exports evolve?

▶ **DYNAMIC PHARMACEUTICAL PRICING: WHAT'S REALLY BEHIND DRUG PRICE CHANGES?**

(PUBLISHED: 2010)

Drug prices are notoriously difficult to understand. They change suddenly and often for non-transparent reasons.

- What's behind these changes?
- How much is driven by market forces such as exchange rates, input costs and inflation?
- What is the outlook for those market forces?

HELPING YOU DEVELOP EFFECTIVE STRATEGIES

In our study, *Dynamic Pharmaceutical Pricing: What's Really Behind Drug Price Changes*, we help you understand drug prices by country and major therapeutic areas so you can develop more informed budget and go-to-market strategies.

Leveraging data from our proprietary *PharmaOnline International* pricing database, we take a fresh look at how ex-manufacturing and retail prices have changed over time, and how pricing differs by therapeutic area and country.

This study provides you with summary data for 18 countries—including some not currently available in *PharmaOnline International*—as well as a presentation that brings the analysis together.

HOW WILL THIS STUDY HELP YOU?

- Optimize your price setting and budgets with detailed information on the key price drivers
- Improve your strategies by understanding the impact of new drugs and cost containment policies on market prices by country
- Illustrate historical price movements by therapeutic area and ATC code
- More accurately anticipate price moves by understanding why prices have changed over time; including qualitative and quantitative factors.

The report provides a comprehensive pricing analysis that harnesses IHS Global Insight's unique combination of pharmaceutical pricing databanks, industry expertise and macroeconomic forecasts of key market drivers such as inflation, costs and exchange rates.



► **MAXIMIZING OPPORTUNITIES IN THE BRIC-MT BLOC: MARKET ACCESS STRATEGIES IN THE WORLD'S FASTEST GROWING MARKETS**

(PUBLISHED 2010)

Emerging markets are increasingly attractive to pharmaceutical companies, presenting strong opportunities for expansion and diversification; however, the challenging regulatory landscapes can pose investment risks.

In order to invest successfully, organizations need to develop greater insights into the emerging healthcare systems and regulatory environments within these markets.

A NEW STUDY FROM IHS GLOBAL INSIGHT

In our new multi-client study, *Maximizing Opportunities in the BRIC-MT Bloc: Market Access Strategies in the World's Fastest Growing Markets*, we explore the opportunities presented by these pharmaceutical markets and delve into their regulatory environments.

Additionally, we examine the role of public and private healthcare insurers, and pricing and reimbursement policies for drugs developed in BRIC-MT countries.

For each country the study answers key questions such as:

- What are the business opportunities for the pharmaceutical industry? For which therapeutic areas?
- How is the statutory health insurance system organized?
- What are the procedures and timings for drug marketing approvals, as well as pricing and reimbursement?
- What is the best way to negotiate with relevant authorities?
- What are the time-to-market trends?
- What role does the private health sector play?
- What are the price trends for drugs in each country, including innovative drugs?

► **BUSINESS OPPORTUNITIES IN THE PRIVATE HEALTHCARE SECTOR**

(PUBLISHED 2010)

In an attempt to limit growing public healthcare costs, governments are increasingly implementing drastic cost-containment policies, which include limiting the funding of services and drugs, and even refusing reimbursement. Consequently, private healthcare expenditure is growing, and private healthcare insurance is set to play an increasing role.

In our new multi-client study, *Business Opportunities in the Private Healthcare Sector*, we explore the alliances that pharmaceutical companies and private healthcare insurers could form in a bid to widen the range of products covered, attract new clients, and boost the sales of products that lack government funding.

This report covers the countries in the European Union in which private healthcare insurers are most active: Belgium, France, Germany, Italy, the Netherlands, Spain, Switzerland, and the United Kingdom.

The report addresses the following key questions:

- Who are the key players in the private healthcare sector, and what are their roles?
- What services do private healthcare insurers offer, and to what extent do they fund drugs that are partially reimbursed—or not at all—by national healthcare systems?
- In what main therapeutic areas do private healthcare insurers specialize? What areas will provide the most opportunities in the future?



- How could pharmaceutical companies and private healthcare insurers form mutually beneficial partnerships?
- What role will the private healthcare sector play in the future?

► **ORPHAN AND ULTRA-ORPHAN DRUGS: ATTACHING VALUE TO TREATMENTS FOR RARE DISEASES**

(PUBLISHED: 2009)

The risks of developing new medicines are increasing, as pharmaceutical and biotech companies face stringent pricing and reimbursement conditions. It is also becoming more difficult to develop medicines that improve on existing treatments for major diseases that have already seen important breakthroughs in recent years.

IHS Global Insight's study, Orphan and Ultra-Orphan Drugs: Attaching Value to Treatments for Rare Diseases, explores the opportunities that orphan drugs present to pharmaceutical and biotech companies. We examine regulatory incentives, emerging competition, and the value of orphan drugs for Australia, France, Germany, Italy, Japan, Spain, the United Kingdom, and the United States.

The report answers the following key questions:

- What are the specific regulatory incentives in terms of clinical guidelines, patent registration, marketing approval, compassionate use, and specific conditions of prescription?
- How does orphan status impact pricing, reimbursement conditions, and the timeline to market per country?
- Who are the main stakeholders in the orphan drugs market? How are they involved?
- Which orphan indications are most attractive?
- What are the main drivers within the orphan drugs market for each country? What are the barriers? Is there a backlash emerging against orphan drugs?
- What are the emerging regulatory and market trends?
- How can patient advocacy groups influence regulation and corporate strategy?

► **RISK-SHARING AGREEMENTS: AN ALTERNATIVE APPROACH TO PRICING NEGOTIATIONS**

(PUBLISHED: 2009)

One way governments and payors are limiting ever-increasing healthcare expenditures is by negotiating the pricing and reimbursement for drugs. While the issue of price limitation was primarily applied for generic drugs, innovative drugs are also encountering strict regulations. The challenge for pharmaceutical companies is to find a balance where they can still maximize revenues, while maintaining a pricing equilibrium that will be approved.

IHS Global Insight's study, Risk-Sharing Agreements: An Alternative Approach to Pricing Negotiations is designed to assist pharmaceutical companies in developing their market opportunities by using this new negotiation strategy. This report includes analyses of nine countries: Australia, Canada, France, Germany, Italy, New Zealand, Spain, the United Kingdom, and the United States.

The report addresses the following key questions:

- What types of risk-sharing agreements have been implemented worldwide and for which drugs? Is there an emerging pattern?
- What are the criteria for these risk-sharing agreements?
- How do risk-sharing agreements impact the price of the drug and market access on a global level?



- What are the main drivers and inhibitors of these agreements for each country?
- How will risk-sharing agreements evolve? To what extent will payors and pharmaceutical companies use this strategy?

► **BIOSIMILARS IN EUROPE AND THE UNITED STATES**

(PUBLISHED: 2009)

Pharmaceutical companies need to understand the implications of changes in prescription and purchasing habits from physicians and hospital pharmacists in order to improve their sales revenue, marketing communications, and overall business strategies. This MCS is an updated report from 2007, including in-depth analysis on recent developments and coverage of the United States.

IHS Global Insight's special report, *Biosimilars in Europe and the United States*, analyzes the biosimilars market for Belgium, France, Germany, Italy, the Netherlands, Poland, Spain, Sweden, the United Kingdom, and the United States.

The report addresses the following key questions:

- How are physicians and pharmacists reacting to the evolving biosimilars market?
 - How confident are they about new biosimilars products?
 - Which products do they use, and which have failed to gain their confidence?
- What expectations do physicians and hospital pharmacists have as a result of pharmaceutical companies' communication, pricing, training, and information about biological medicines and biosimilars?
- What are the consequences of market entry for biosimilars in haematology, endocrinology, neurology, internal medicine, neurology, oncology, gastroenterology, and rheumatology?

In addition, the report includes:

- Details of the legal and regulatory framework for biosimilars in each country
- An overview of the current biosimilars market and market trends for each country
- Country profiles identifying the drivers and problems related to the prescribing, purchasing, and dispensing of biosimilars as forecasted by healthcare professionals for each category of drug

► **THERANOSTICS: INSIGHT INTO A NEW MEDICAL MODEL**

(PUBLISHED: 2009)

Theranostics is a diagnostic test that identifies the possible responses a patient could experience when taking a new medication, and offers a foundation for tailoring treatments based on the results. Through better control of patient treatments, this new model of therapy also contributes to healthcare expenditure savings.

Our special report, *Theranostics: Insight into a New Medical Model*, is designed to assist pharmaceutical, biotechnology, and diagnostic companies in developing their market opportunities in theranostics.

The report provides:

- Analysis of the different legal and regulatory frameworks for theranostics in America, Europe, and Japan
- An overview of key stakeholders and the theranostic technologies currently on the market
- An outline of medical treatments that have been or are currently being developed, including key diagnostic techniques
- A forecast of the main market trends and partnerships between pharmaceutical and biotechnology companies over the next 10 years with regard to theranostic techniques



► **DIRECT-TO-PHARMACY DISTRIBUTION:
MANAGING RELATIONSHIPS IN 12 EUROPEAN MARKETS**

(PUBLISHED: 2008)

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.

The report provides solid analysis and forecasts of direct-to-pharmacy distributions on both local and Pan-European levels. It will help optimize your distribution and supply chain strategies for each category of drugs: prescription drugs, parallel imports and locally sourced drugs, imported drugs, generic prescription drugs, and over the counter drugs. This study:

- 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

► **A SURVEY OF THE EUROPEAN HOSPITAL DRUG MARKET**

(PUBLISHED: 2008)

This study offers a comprehensive survey of the European hospital drug market, allowing healthcare industry professionals to develop strategies for distribution of drugs throughout hospitals in Europe. The report includes in-depth analyses of the hospital drug market in 12 European countries: Belgium, Czech Republic, France, Germany, Italy, Netherlands, Poland, Portugal, Spain, Sweden, Switzerland, and the United Kingdom.

The contents of this study include:

- Details of the regulatory framework for hospitals in each country and in Europe
- Comparisons of the hospital financing and policies, drug pricing and reimbursement systems, and drug policies
- Identification of drivers and problems related to approval, pricing, purchasing, and financing of hospital drugs
- Assessments of the potential development of hospital markets and the key success factors

► **BIOSIMILARS IN EUROPE, AN OUTLOOK**

(PUBLISHED: 2007)

As patents expire and new biosimilars are developed, the success of their adoption will largely depend on how each country implements pricing and reimbursement strategies. How will the relevant authorities manage biosimilar launches? How will health professionals react to these products?

The report includes analyses of biosimilars in 11 European countries: Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, and the United Kingdom.

The contents of this study include:

- Details of the regulatory framework for biosimilars in each country and in Europe



- Identification of the drivers and problems related to the prescribing, purchasing, and dispensing of biosimilars forecasted by healthcare professionals for each category of the following drugs: growth hormone, somatostatin and analogues, EPO, insulin, infertility drugs, G-CSF, interferons, coagulation factors, and bio-oncology drugs
- Assessments of the potential development of biosimilars in these categories and future drug classes (e.g., LMW Heparins)

► **PHARMACEUTICAL PARALLEL TRADE IN EUROPE: A MEDIUM-TERM OUTLOOK**

(PUBLISHED: 2007)

For several years, parallel trade of pharmaceutical products has been an important issue for the European pharmaceutical industry and numerous policy institutions, including the European Commission, the European Court of Justice, and the Member States. Supply chain managers, wholesalers, and traders in the pharmaceutical industry must understand the future of parallel trade in order to better align their business strategies and optimize their partnerships with wholesalers and pharmacies.

The report includes a medium-term outlook and analyses of pharmaceutical parallel trade in 12 European countries: Belgium, Denmark, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Spain, Sweden, and the United Kingdom.

The contents of this study include:

- An analysis of the structure and trends in the pharmaceutical distribution markets in European countries most affected by parallel trade
- Identification and analysis of the key players, drivers, and inhibitors of parallel trade
- A medium-term outlook for European pharmaceutical distribution
- Assessments of the key success factors required for growth of parallel trade

► **EUROPEAN POLICIES FOR MEDICINE: SUCCESSFULLY DEVELOPING PHARMACEUTICALS IN 15 EUROPEAN MARKETS**

(PUBLISHED: 2006; UPDATED IN 2008)

The enlargement of the European Community had a significant impact on pharmaceutical trade. Issues of cost containment spread throughout large European healthcare markets, affecting current pricing and reimbursement practices including: health refunding; drug launches; and pricing, evaluation, and reimbursement of medicines. This special report provides detailed comparisons of the pricing and reimbursement systems to help pharmaceutical business developers improve their strategy and make more informed decisions.

The report includes analyses of pricing and reimbursement systems in 19 European countries: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Luxembourg, Netherlands, Poland, Portugal, Republic Czech, Spain, Sweden, Switzerland, and the United Kingdom.

The contents of the study include:

- Comparisons of price and reimbursement systems and practices
- Examinations of the complementary private health insurers who support the demand of drug coverage
- Calculations of average manufacturer and public selling prices and reimbursement rates by therapeutic areas in the Big 5 (France, Germany, Italy, Spain, and the United Kingdom)
- An exploration of factors that will significantly impact national and international pharmaceutical policies
- Price analysis in the Big 5, using IHS Global Insight's Pharm On line International price database



► **IHS GLOBAL INSIGHT HEALTHCARE & PHARMA SERVICES**

IHS Global Insight’s Healthcare & Pharma practice provides a portfolio of intelligence solutions to optimize the performance of companies and organizations across the pharmaceutical, biotech, and generics sectors. Our key focus is to provide actionable insights to support strategic decision making — particularly in the fields of market access, pricing and reimbursement (P&R), emerging markets, generics strategies, therapeutic development pathways, and general competitive intelligence. We deliver high-value subscription and consultancy services to address daily healthcare information needs, highlight important market trends and obstacles, and maximize product life cycles. These services include our Same-Day Analysis — providing the latest global analysis on fast-paced developments in the sector on a daily basis — multi-client studies, special reports, country reports, global pricing data, and market access consultancy. Our expertise is based on the unparalleled geographic and therapeutic specialties of our in-house data and specialized analysts.

For more information, please visit www.ihsglobalinsight.com/healthcare.

THE POWER OF PERSPECTIVE

ABOUT IHS GLOBAL INSIGHT: IHS Global Insight (www.ihsglobalinsight.com) provides the most comprehensive economic and financial information on countries, regions, and industries available from any source. IHS Global Insight’s immediate and insightful analysis of market conditions and key events enables innovative and successful decision making for clients around the world. IHS Global Insight employs approximately 700 employees in 13 countries.

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