

# Central and Eastern Europe OTC Drugs Industry Outlook to 2017- Expanding Access to Distribution Channels to Lead Sales Growth

<https://marketpublishers.com/r/C7B480B200AEN.html>

Date: December 2013

Pages: 229

Price: US\$ 1,300.00 (Single User License)

ID: C7B480B200AEN

## Abstracts

The report titled “Central and Eastern Europe OTC Drugs Industry Outlook to 2017- Expanding Access to Distribution Channels to Lead Sales Growth ” presents a comprehensive analysis of the industry covering aspects including market size by revenue and market segmentation by cold and cough medications, analgesics, digestives, skin treatment products, vitamin and mineral supplements and others and by geography including Russia, Poland, Ukraine, The Czech Republic, Romania, Hungary, Slovakia and Bulgaria. The report also entails a detailed description on the recent trends and developments in the market in the region and competitive scenario of major players in major geographies.

With burgeoning wealth and increasing awareness of the advantages of good healthcare and healthier lifestyles, emerging markets across the globe such as that of Central and Eastern Europe, Latin America and Asia-Pacific countries are turning out to be significant markets for pharmaceutical drugs. OTC drugs market in Central and Eastern Europe is one of the most rapidly emerging markets for pharmaceuticals in the world. Surging acceptance of such drugs by the people, increased availability and wide spread usage of non-prescription drugs to treat minor ailments has resulted in rapid growth of the market in the region over the last few years.

The market has recorded remarkable growth over the last six years by growing at an average annual rate of 8.1% from 2006-2012. The total market value in the region was recorded to be USD ~ million in 2006 which rose to USD ~ million in 2012. Digestives are considered as one of the prime segments of the industry accounting for a total of ~% share in the market revenue in 2012. The market for OTC digestives in the Central and Eastern European region has grown at a pace of 6.8% over the period 2006-2012.

Vitamins and mineral supplements have also considerably aided market growth in the region in the recent years. The market sales value have increased predominantly over the years from USD ~ million in 2006 to USD ~ million in 2012 due to the well educated population inclined towards the benefits of healthy living and wellness protocols.

Russia is the largest market for OTC medications in the region with a share of ~% in 2012 as compared to ~% in 2006. The sale of OTC drugs in Russia occurs through only the pharmacy chains. Pharmacy chain 36.6 is the largest pharmacy chain in Russia. In the Russian market for OTC medications, cold and cough medications commanded the largest share of ~% share of the total OTC drugs sales in the country in 2012 which has risen from ~% in 2006. OTC skin products held the fourth largest share of ~% in the OTC drugs market in Russia in 2012. Pharmstandard is the largest company with a market share of ~%. The revenue from the sales of OTC drugs by the company was recorded as USD ~ million in 2012 as compared to USD ~ million in 2011.

The OTC drugs market in Poland is the second largest market in Central and Eastern European region accounting for a share of ~% in the overall market in 2012. In 2012, the OTC drugs market in Poland was valued at USD ~ million as compared to USD ~ million in 2011. Poland's non-prescription drugs market has been largely held by the drugs used for treating cold, cough and other respiratory disorders. The segment accounted for the largest share of around ~% in the OTC drugs market revenue in the country in 2011 mainly due to the widespread flu among the people in the country. Painkillers/analgesics were the third largest segment of the industry in 2012 accounting for ~% share in the market. The market is predominantly held by USP Zdrowie with a market share of ~% in 2012 followed by Aflofarm, GSK Consumer healthcare and Bayer sharing nearly ~%, ~% and ~% respectively.

Ukraine, the Czech Republic and Romania held the next leading positions in the market with a share of ~%, ~% and ~% respectively in 2012. Cold and cough medications have traditionally led the market for OTC medications in the Czech Republic with a share of ~% in 2012 as compared to ~% in 2006.

Hungary has one of the most developed pharmaceutical industries in the Central and East European region. Some of the leading non-prescription medicines manufactures in the country include Sanofi Aventis, Novartis, Bayer Hungaria, Novartis, Teva Magyarorszag, EGIS among others together accounting for a market share of ~% in 2012.

## KEY TOPICS COVERED IN THE REPORT

The market size of Central and Eastern Europe OTC Drugs Market in terms of revenue, 2006-2012

Market Segmentation in the region by product categories and by geography, 2006-2012

Market Share of Leading Players in overall OTC Drugs Market in Russia, Poland, Ukraine, Hungary

Market Share of Leading Players in different segments of OTC drugs in Russia

Revenues of Top 10 Pharmaceutical Companies in Romania by Sales Value of OTC Cold and Flu Drugs, 2012

Trends and Developments in the Central and Eastern Europe OTC Drugs industry and by geographies

Government Regulations in the Pharmaceutical Sector in each Geography (excluding Slovakia)

Competitive Landscape of Major Players in OTC Drugs Market in Russia, Poland, Ukraine and the Czech Republic.

Future Outlook and Projections of OTC Drugs market in each Geography in the region, 2013-2017

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