

# **EU Central and Eastern European Pharma Markets - Secrets of Access and Engagement**

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## **Abstracts**

Homogeneity and standardization—across the European Union, they're the bricks for building an economic powerhouse that offers a single system of laws governing people, goods, services and capital.

Yet as the EU has expanded to include former Soviet bloc countries like Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Romania and Slovakia, the predictability the Union has developed can strain under the weight of history and culture.

Nowhere is that more apparent than in the pharmaceutical industry which, after decades under communist rule, now operates with far different influences than in the wider EU community. From the privatization of pharmacies after an era of state-run health to greater consumer expectations and higher consumption of drugs, Eastern and Central European countries offer great development possibility—and great hurdles.

Despite efforts by CEE legislators to adhere to their agreed accession criteria, thus improving their evolving pharma markets, the unique nature of each state has a profound impact on how they function. Poland, Bulgaria and Hungary have larger private manufacturing bases than any other former communist state, for example, while Lithuania has one of the most complex reimbursement systems. As Estonia's state-sustained costs have exploded, the Czech Republic has evolved from mostly free pharmaceuticals to one of the most advanced cost-control measures of any Eastern European country. Even amidst such market variation, however, there are common themes: Advertising fatigue, erratic prescribing habits, a financial divide between rural and urban consumers and physicians' wariness of sales representatives.

How does the pharmaceutical industry develop a stable base amidst such heterogeneity?

### **Key insights and strategies from industry leaders**

FirstWord's fascinating new report entitled EU Central and Eastern European Pharma Markets – Secrets of Access and Engagement closely examines nine CEE countries to paint a clear and concise picture of a region that, decades later, still feels the influence of state-run health care. Based on intensive interviews with key marketplace participants in the region, the page report intelligently profiles the current environment in each country, offers case studies, discusses the cultural context for drug consumption and distribution, and includes strategic details such as relative size of imports and domestic production.

The report investigates the current climate in nine EU countries to establish:

New and potentially lucrative opportunities for new and existing manufacturers

Key issues facing the industry based on political, history and cultural factors

### **The report**

Provides critical insight into how EU legislative and regulatory standards offer a framework that still allows for regional variation in pharmaceutical market development

Explains the region's important social dynamics and how they impact sales and marketing

Identifies three key issues facing the industry in CEE countries, and outlines solutions

Offers detailed case studies of key manufacturers in the region as well as a profile of pharmacy outlets and a prescribing physician

Includes sections on intellectual property issues, consumer behaviour and

pharma distribution through retail and online outlets

### **Major manufacturers profiled in this report**

GlaxoSmithKline( Bulgaria, Hungary)

Sting (Bulgaria)

Elpis (Latvia)

UAB Limedika (Lithuania)

Bayer (Romania)

Pfizer (Slovakia)

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