

Pharmacies

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Abstracts

The study will be available in electronic form, after an order is received, within 6 days.

The present research report was compiled by STOCHASIS Management Consultancy S.A. with the purpose of reflecting the current state of the market of pharmacies in Greece and to examine its prospects, while presenting information on the international market.

Specifically, the first five chapters of the report feature information on the pharmacies, which refer to general characteristics, the institutional framework, the demand, the supply and the market size. In the sixth chapter of the study information on the relevant market internationally is presented. Finally, conclusions and prospects of the market are discussed.

The key determinants of demand in this market consist of the economic conditions, demographic characteristics, lifestyle, merchandising, media and the evolution of medicine. Although, the demand can be considered to be inelastic, due to the nature of the product, economic conditions have a considerable effect on it in three main ways. These include the significant limitation of expenditure on drugs, in the context of fiscal consolidation (from €5,09 billion in 2009 to €2,00 billion in 2014, reduced by 60.5%), the shifting of costs towards the patient, the average participation rate of the patients to the insurance payments in medicine increasing from 12.8% in 2012 to 24.4% in the end of 2013, to increase to approximately 33% in September 2014, and the significant increase of the medicine which are not covered by the public insurance. The demand was also affected by the recession that lead to a decrease of the disposable income of households and private consumption, with negative consequences on the trade of other products sold in pharmacies (parapharmaceutical products, personal hygiene products, cosmetics).

It is due notice that within the industry a considerable number of pharmacies conduct their business (about 9.700 pharmacies).

The factors that determine the competition in-between pharmacies, given the set prices of drugs, are the interpersonal relations between pharmacists and consumers, the quality of service, the variety of parapharmaceutical products and the geographic distribution, mold the intensity of competition in the industry. In addition, the competition is intensified by the rise of online pharmacies, which utilize promotions (such as discounts and offers) and the availability of parapharmaceutical products on super markets.

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