



IHS ECONOMICS

# Intra-Country Tiered Pricing

## Optimising Pricing Strategies in Emerging Markets

Finding the balance between prices of, and access to, new pharmaceuticals is critically important to the pharmaceutical industry, emerging-market payers, patients and non-governmental organisations (NGOs). Intra-country tiered pricing provides a sophisticated, effective tool for drug manufacturers to increase patient access to pharmaceuticals, but the strategy is not without challenges and issues.

Based on extensive secondary research and interviews with key opinion leaders and payers, the IHS Life Sciences multi-client study Intra-Country Tiered Pricing: Optimising Pricing Strategies in Emerging Markets looks at the pharmaceutical policy context and landscape within specific markets and helps create lasting and commercially viable affordability-based pricing strategies. Following our well-received study Global Tiered Pricing Strategies: Matching Prices with Local Market Conditions, which looked at pricing strategies between different countries depending on the varying economic realities, this new study focuses on countries where pharmaceutical companies can segment their prices within the individual market, particularly in the context of high out-of-pocket payments.

This study not only recognises that there remain significant opportunities for the industry to unlock previously untapped markets, market segments, and therapeutic areas, but also provides the necessary information, analytics, and expertise to strategically and effectively implement tiered-pricing strategies within a country.

<b>Answering complex questions</b>	<ul style="list-style-type: none"> <li>• What are the opportunities for intra-country tiered pricing?</li> <li>• What is the government doing to promote affordability-based pricing?</li> <li>• What is the best way to address affordability disparities within the country?</li> <li>• How can intra-country tiered pricing be implemented on the ground?</li> <li>• What type of payer-industry partnerships would the government consider to promote intra-country tiered pricing?</li> </ul>	<ul style="list-style-type: none"> <li>• What can be done to prevent product leakage across distribution channels?</li> <li>• What are the lessons from existing intra-country tiered pricing programmes, in terms of challenges and outcomes?</li> <li>• What factors make the best-in-class programmes a success?</li> </ul>
<b>Countries covered</b>	<ul style="list-style-type: none"> <li>• Brazil</li> <li>• China</li> </ul>	<ul style="list-style-type: none"> <li>• Ghana</li> <li>• India</li> <li>• Malaysia</li> <li>• Mexico</li> <li>• Philippines</li> </ul>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• Report available online via our MyInsight platform and in PDF</li> </ul>	<ul style="list-style-type: none"> <li>• Available as a standalone study or as part of a bundle including studies, presentations, and workshops</li> </ul>

## Meet our experts

**Gustav Ando** leads the Life Sciences practice at IHS. Formerly a healthcare analyst, he has extensive experience in the fields of market access, therapeutic development, drug safety, emerging markets, and health outcomes. Previously, Gustav worked with pre-merger Pharmacia Corporation in New Jersey and Pharmacia AB in Stockholm. He is a graduate of politics from the University of Durham and has a Masters degree in international studies from the University of Uppsala, Sweden, specializing in healthcare politics.

**Gaëlle Marinoni** manages the European consulting and multi-client study offerings in the IHS Life Sciences practice. Previously, she was a consultant for Brandtectonics Access, a market-access and clinical trial recruitment enhancement specialist. Prior to this, Marinoni worked at IHS as a European research analyst and at the National Institute for Medical Research as a research scientist. Marinoni holds a Doctorate in microbiology from the University of Western Ontario (Canada), a joint Masters of Science in microbiology from the Pasteur Institute and the University of Paris VII, and a Masters in genetics from the University of Paris VII.

**Cameron Lockwood** is an analyst within the Life Sciences consulting and multi-client study team. He holds a Bachelor of Science in molecular biology from the University of Manchester. He worked as a consultant in the market-access field for Brandtectonics Access, and gained experience in business intelligence with Informa Healthcare

## Our experts and our supporting team are available to answer your questions about the study and its findings.

## IHS Life Sciences Services

The IHS Life Sciences practice provides a portfolio of intelligence solutions to optimize the performance of companies and organizations across the pharmaceutical, biotech, generics, medical device, hospital, insurance, and public 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, forecasting and market sizing, and general competitive intelligence. This analysis is based on our proprietary global data in pharmaceutical pricing, reimbursement information, clinical trials, and healthcare forecasting.

### ABOUT IHS

IHS is a global information company with world-class experts in the pivotal areas shaping today's business landscape: energy, economics, geopolitical risk, sustainability and supply chain management. We employ more than 8,000 people in more than 31 countries around the world.

For more information

[www.ihs.com/LifeSciences](http://www.ihs.com/LifeSciences)  
[www.ihs.com/healthcareblog](http://www.ihs.com/healthcareblog)