



## A 2011 Survey of the European Hospital Drug Market

While healthcare expenditure is rising across the board, it is growing at its fastest pace in the hospital sector.



With hospital stays, procedures and secondary-care pharmaceuticals increasingly weighing on total healthcare budgets, a number of European governments have tackled a reform of the sector.

### A New Study from IHS Global Insight

Our latest study, A 2011 Survey of the European Hospital Drug Market, provides a detailed view of the current state 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

### Helping You Identify and Navigate Market Opportunities

Based on primary research with regulatory stakeholders, secondary-care decision makers and influencers, and hospital and retail pharmacists, the study will answer the following key questions at a national and European level:

- What are the regulatory and business frameworks for secondary-care medicines?
- What are the market access barriers and incentives for secondary-care medicines?
- Who are the key decision makers and their influencers for hospital drug reimbursement?
- What are the hospital medicine purchasing patterns and projected market trends?
- What are the drivers to success in the sector?

### Methodology

#### Primary Research

- Over 100 thirty-minute telephone interviews with regulatory stakeholders, secondary-care decision makers and influencers, and pharmacists
- Analysis and transversal comparison of international prices for ca. 100 innovative hospital medicines

#### Secondary Research

- Extensive desk-based research and surveys of national regulators, professional associations, literature review, and IHS proprietary databases including World Markets Healthcare, World Markets Pricing and Reimbursement, World Markets Forecasting, and PharmOnlineInternational (POLI)
- In-depth analysis of national legal and regulatory frameworks

### Deliverables

- An electronic report (ca. 400 pages) delivered in PDF format and through MyInsight, with 12 detailed country profiles and a comparative cross-country analysis presented in Microsoft PowerPoint®
- Online access to the electronic report

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#### Hospital Market Overview

- Sector organisation
- Hospital categorisation
- Sector statistics
- Hospital funding and financing
- Hospital spending

#### Hospital Medicines

- Public and private pharmaceutical expenditure by therapeutic areas
- Marketing approval process
- Dispensing channels for in- and out-patients
- Hospital formularies: key decisions makers, influencers and formulary inclusion criteria
- Pharmaceutical pricing and purchasing procedures
- Reimbursement for in- and out-patients
- Hospital drug supply chain: organisation, margins and discounts

#### Outlook

- Recent and expected reforms
- Anticipated market changes

### Meet Our Experts

**Gustav Ando** leads the Healthcare and Pharma 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 has 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** is a senior analyst in the IHS Healthcare and Pharma practice. Previously she was a consultant for Brandtectonics Access, a market access and clinical trial recruitment enhancement specialist. Prior to this, Gaëlle worked at IHS as a European research analyst and at the National Institute for Medical Research as a research scientist. Gaëlle holds a Ph.D. in Microbiology from the University of Western Ontario (Canada), a joint M.Sc. in Microbiology from the Pasteur Institute and the University of Paris VII and a Masters in Genetics from the University of Paris VII.



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

### IHS Global Insight Healthcare & Pharmaceutical Services

IHS Global Insight's Healthcare & Pharmaceutical 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.



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