



2ND EUROPEAN OBSERVATORY ON SELF-MEDICATION IN 2013



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24 June 2014
Maison de l'Europe, Paris



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1

Introduction





50th Annual AESGP Annual Meeting: Key learnings

- ❑ **A favourable context** for the development of the self-medication market:
 - ageing population
 - increase in chronic diseases
 - growing desire by patients to play a role in the management of their own healthcare

- ❑ **Switching**, a win-win solution for patients, healthcare systems, and public authorities
 - Growing role of pharmacists, economic and financial benefits due notably to fewer visits to the GP, etc.

- ❑ Pharma industry: **credible players** in launching initiatives to **promote correct use**
 - AFIPA: a Risk Minimisation Plan for Vasoconstrictors
 - CHPA (US consumer healthcare association): risk minimisation strategy to prevent teen abuse of dextromethorphan



Self-medication in France in 2013: a break in growth momentum

- ❑ A market in **recession and weakened** for the first time in 5 years (−3.0% in value)
- ❑ Despite **attractive political initiatives** for the sector (*Conseil stratégique de filière[CSF]*)
- ❑ Political willingness nevertheless remains **to be confirmed if new ways of thinking or working are to emerge.**



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Objectives and methodology





Objectives of the 2nd Observatory

- Following on from the 1st European Observatory on Self-Medication conducted in June 2013, this 2nd Observatory aims to assess developments in European markets and regulatory frameworks...
- ... Via an analysis of 8 European countries EU8

Germany



Italy



Belgium



Netherlands



Spain



United Kingdom



France



Sweden



This Observatory seeks to determine the state of play of the self-medication landscape in Europe, in particular in France, through an analysis of relevant indicators.



Methodology of the 2nd Observatory (1/2)

□ The data on which the Observatory is based were collected from questionnaires carried out with:

- The Association of the European Self-Medication Industry
- Self-medication associations in the 8 European countries analysed:



Germany



Italy



Belgium



Netherlands



Spain



United Kingdom



France



Sweden



- The expert and experienced consultants of Agora Consulting





Methodology of the 2nd Observatory (2/2)

- ❑ French distribution data were collected from a **real-time panel of retail pharmacies, representative of all French retail pharmacies**, that were then extrapolated in a dynamic manner to all retail pharmacies in France.

- ❑ The data collected was analysed by Celtipharm consultants.

- ❑ The data and analyses were approved by a **Scientific Committee**:
 - Health economists
 - Retail pharmacists



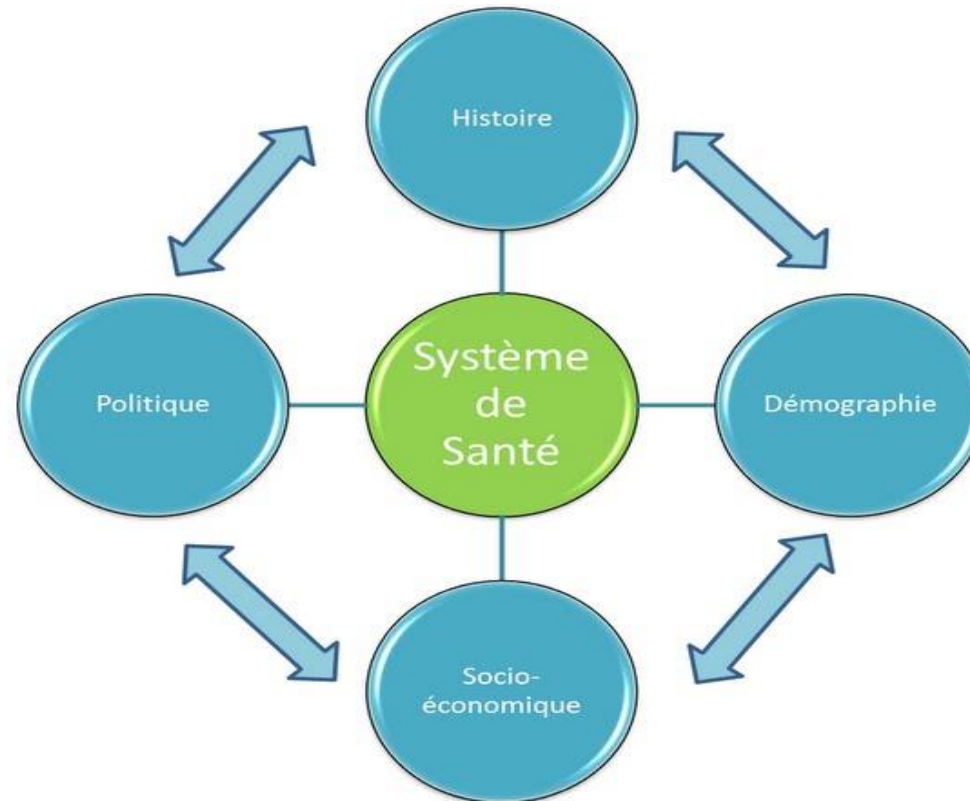
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Healthcare systems





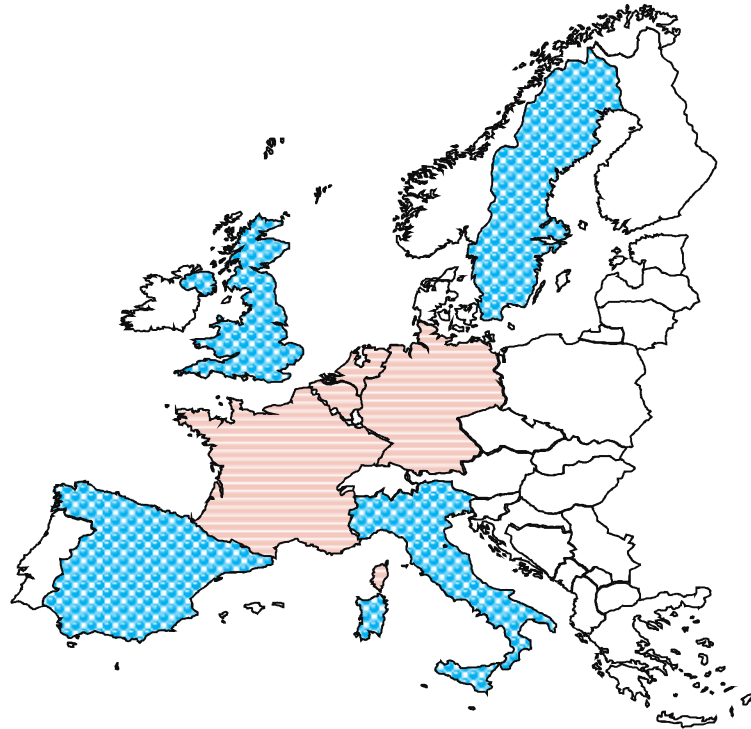
Principal elements of healthcare systems



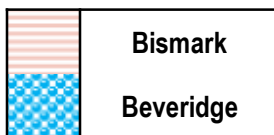
- Two healthcare systems are based on these elements: **the Bismarck system and the Beveridge system**
- Today, healthcare systems operate on the basis of **both systems** with a Bismarckian or Beveridgean influence depending on their origins.



Features and mapping of European healthcare systems



Healthcare systems

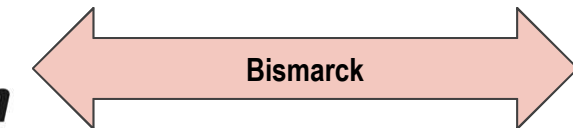
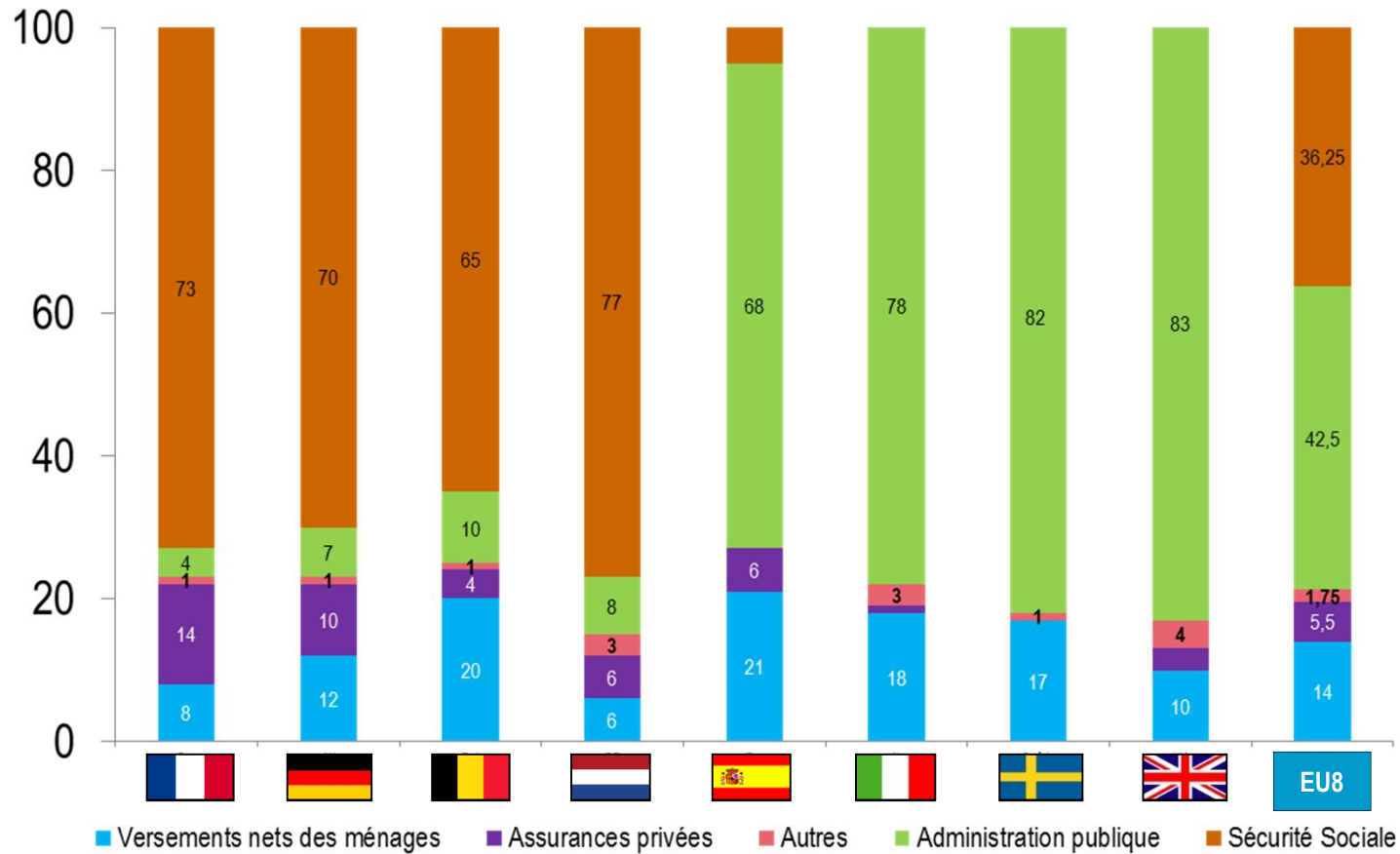


	Bismarck	Beveridge
Country		
Coverage	Professional social insurance	Universal
Mandatory for	Wage earners below a certain ceiling	All
Funding base	Employee contributions	Tax system
Management model	Decentralised (Funds)	Centralised (Government)
Market access	Centralised	Decentralised
Benefits	Flat rate	Proportional to wages and capped



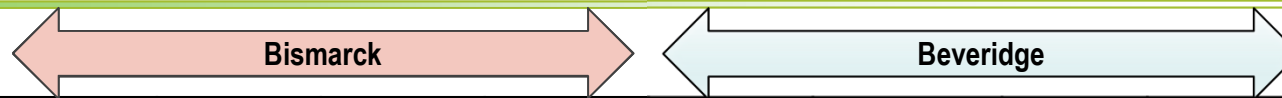
Overview of healthcare spending by type of financing

Dépenses de santé par type de financement





The organisation of primary care in Europe (1/2)

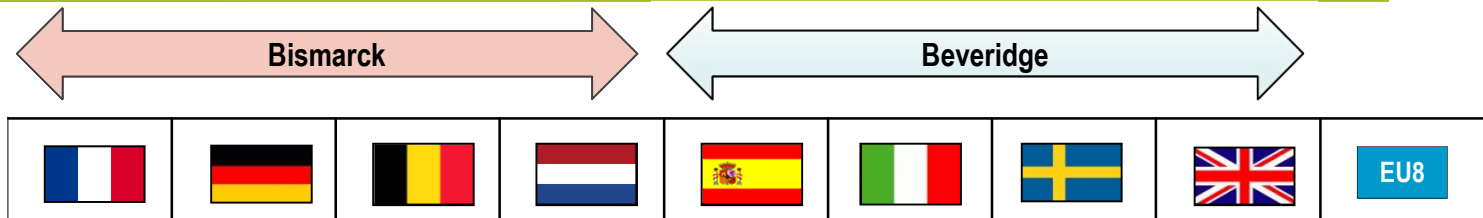


									EU8
Density of GPs (per capita)	3.3	3.8	2.9	3.0	3.8	4.1	3.9	2.8	3.45
Remuneration	Fee for service	Mixed	Fee for service	Mixed	Salary	Capitation	Salary	3 modes	
Gatekeeper	Limited	Limited	×	Limited	✓	✓	✓	✓	
Rate of prescription following GP consultation	75%	50%	80%	60%	<30%	<40%	<30%	24%	47%
Density of nurses (per capita)	8.7	11.4	15.4	11.8	5.5	6.3	11.1	8.6	9.85
Remuneration	Salary	Salary	Salary	Salary	Salary	Salary	Salary	Salary	
Right to prescribe	×	×	×	×	×	×	✓	✓	

- Bismarck systems are characterised by a lack of gatekeepers and a remuneration system that encourages GPs to play a role in minor ailments, despite the ready availability of nurses.
- France's organisation of its medical system favours the role of GPs in the treatment of minor ailments.



The organisation of primary care in Europe (2/2)



Grouped primary care	39%	28%	30%	57%	23%	20%	98%	92%	48%
Venue	Private	Private	Private	Private	Private	Private	Public Centre	Private*	
Professional concerned	GP	GP	GP	GP	GP	GP	Multiple	Multiple	
GP/Nurse cooperation	×	×	×	×	✓	✓	✓	✓	

* Under contract with the local authorities

- There is a **wide diversity in the organisation of primary care** between the Bismarck and Beveridge systems.
- Cooperation in the organisation of primary care between nurses and GPs is highly developed in the UK and Sweden, countries where the GP is the entry point for the healthcare system.
- France is **close to the average in terms of the density of GPs and nurses**.



The culture of patient responsibility is unequal and diversified

Country	% population with complementary cover	Payment of out-of-pocket expenses				Responsabilisation of patient
		Excess	Co-payment (fee/pack or prescription)	User fee	Reference fee	
	93%	-	€0.50/pack	35, 65, or 85%	✓	
	11%	-	10% of the reference price for medicines	-	✓	
	80%	-	-	25, 50, 60, 80%	✓	
	90%	€360	-	-	✓	
	13%	-	10, 40, 50 or 60% of the sales price (means tested) Prescription fee in certain regions	10 or 40%	✓	
	15%	-	Prescription fee in certain regions Fee applicable to medicines in certain regions (€0.50 to €4.50)	-	✓	
	5%	€250	-	10, 25, 50 or 100%	✓	
	12%	-	Prescription fee: €9.60	-	✗	

Notable differences in the culture of patient responsibility exist between the Nordics and Southern European countries.



ORGANISATION OF HEALTHCARE SYSTEMS: KEY CONCLUSIONS

- ❑ With its combined Bismarck system (Universal Health Cover [CMU] / long term illnesses [ALD]), France is a highly protective country **that extends medical cover to minor ailments.**

- ❑ As such, the self-medication market in France has 3 specificities:
 - The same molecule is frequently the subject of both Mandatory Medical Prescription and Optional Medical Prescription
 - A culture specific to France of extending medical cover to minor ailments
 - Confusion between individual responsibility for treatment and product efficacy (insufficient therapeutic value)



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Evolution in self-medication markets in 2013



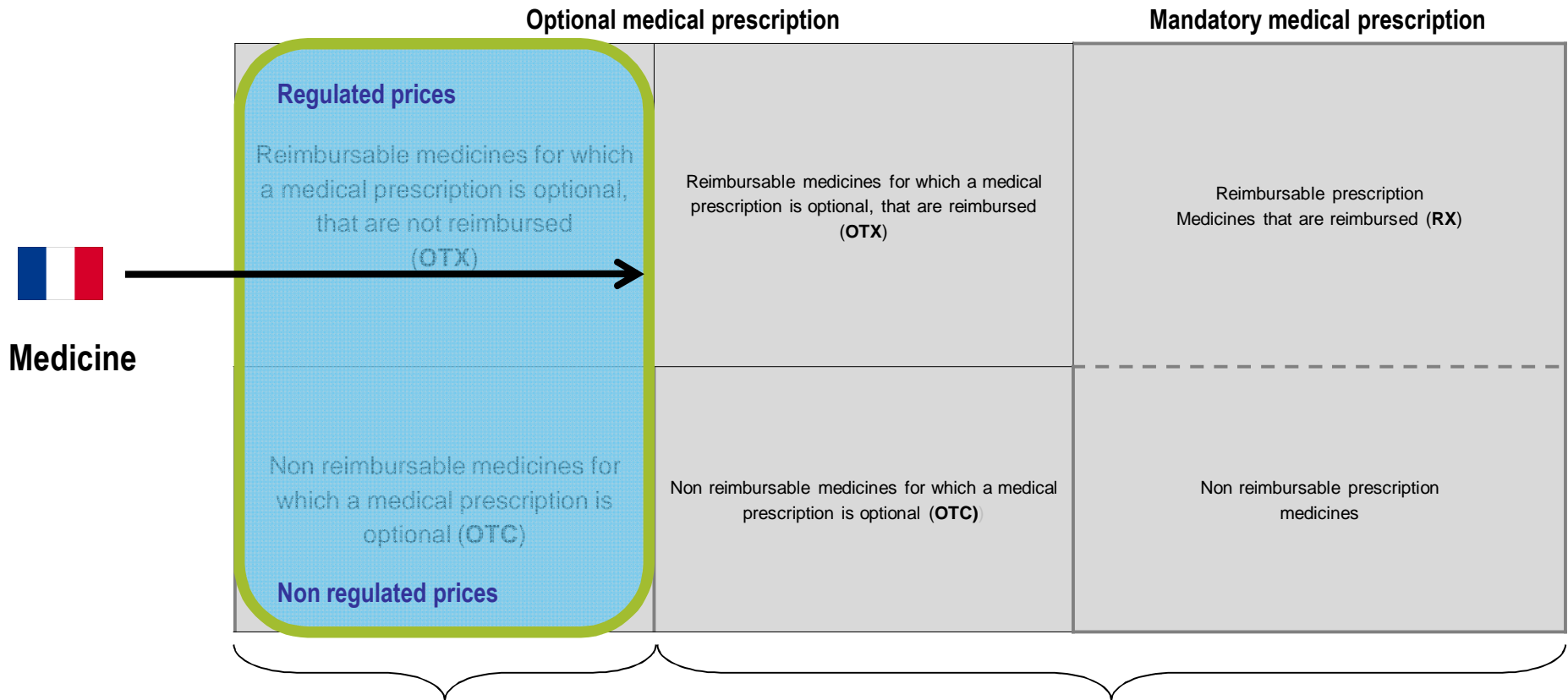


Self-medication as defined by AFIPA

Self-medication medicines are defined in terms of their medical prescription status.

Scope of the analysis:

> **Only medicines for which a medical prescription is optional** were analysed



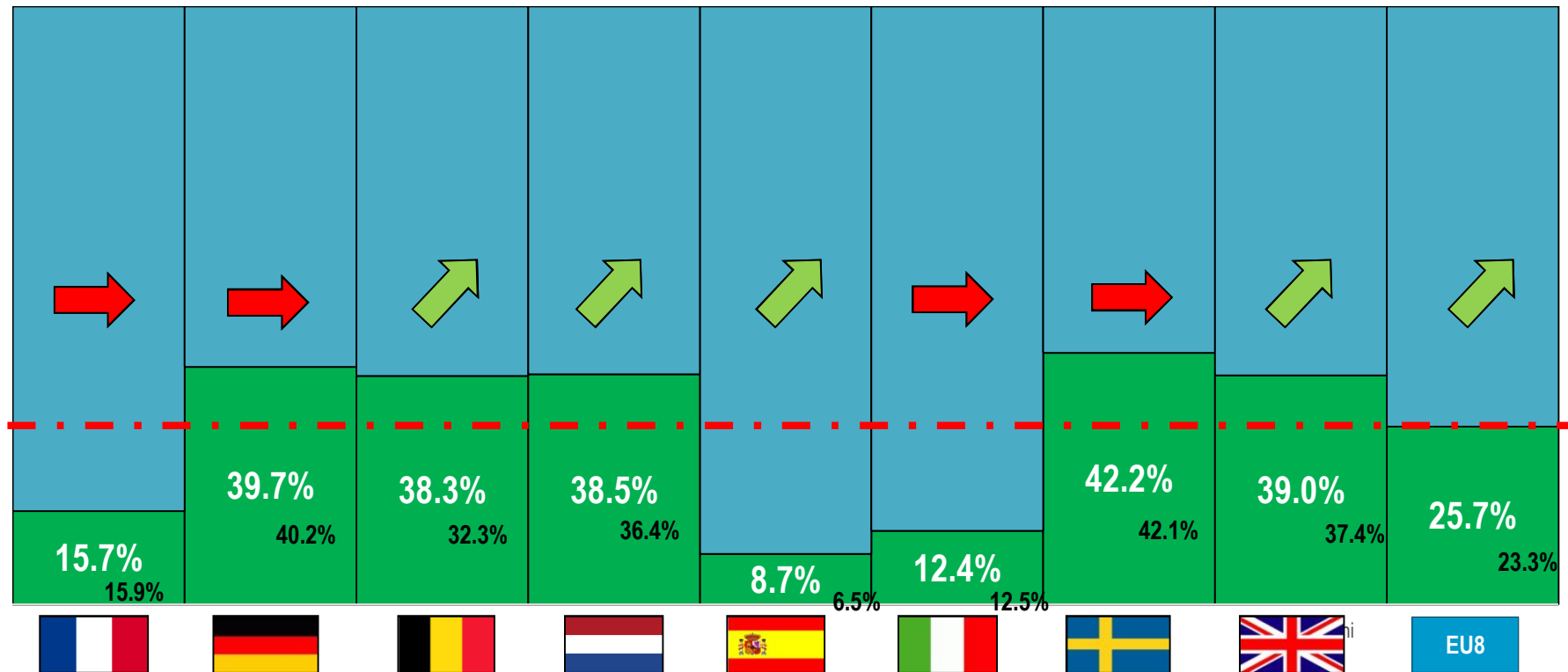


The market share of self-medication in France remains below the European average

Market share of self-medication in 2013 by volume (CU)

■ Part de marché de l'automédication 2013

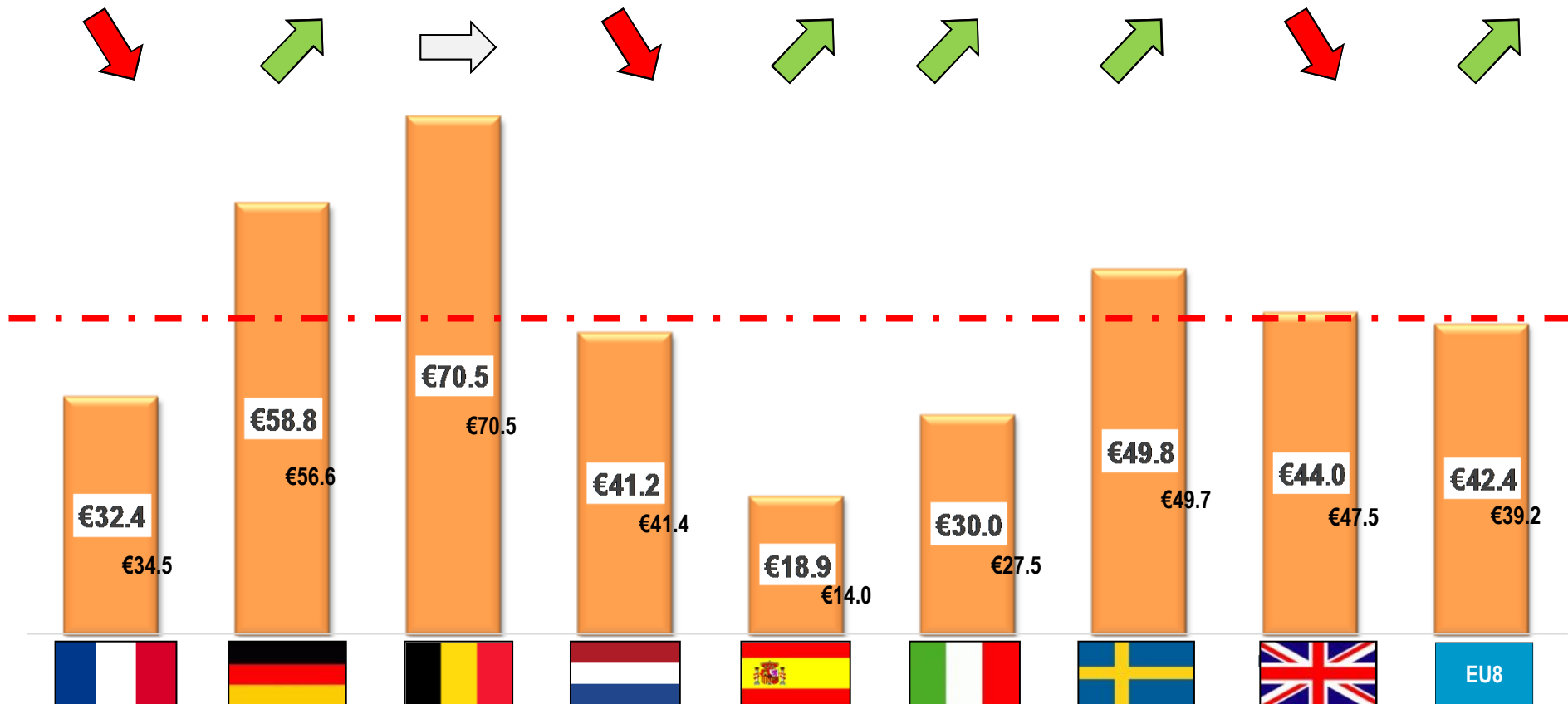
■ Part de marché hors-automédication 2013























In France, the per capita spend on self-medication is among the lowest in Europe

Per capita spend on self-medication in 2013 in value (incl. VAT)













The French situation contrasts with that observed in other European countries

	Self-medication 2013 in value (incl. VAT)	Change 2013-2012
	€2,123 billion	
	€4,731 billion	
	€787 billion	
	€691 billion	
	€885 billion	
	€1,792 billion	
	€476 billion	
	€2,800 billion	
	€1,240 billion	



Finding: the development of self-medication in Europe in 2013

Country	Major changes	Switching	Change in self-medication	Comments
 FRA	-	-	-	No de-reimbursement in 2013 No major change in self-medication
 GER	-	-	-	2013: No major change in development
 BEL	-	-	-	2013: No major change
 NETH	++	-	-	2013: Volumes increased by 6% Increase in Own Risk to be paid: €220 in 2012 → €360 in 2013 (over a 12-month period)
 SP	+++	+++	-	2013: similar development over a common scope Many de-reimbursements of reference products (319)
 ITA	++	-	++	2013: increase in value and volumes Increase in confidence in self-medication by patients More highly valued by institutions
 SWE	-	-	-	2013: Out of pocket fee of €250 before any reimbursement is made (over a 12-month period)
 UK	-	+	-	2013: GMS own brand Switching: calcium carbonate



CHANGES IN SELF-MEDICATION MARKETS IN 2013: KEY CONCLUSIONS

- ❑ The market share of self-medication in France **remains below** the European average
- ❑ Self-medication spending per capita **among the lowest in Europe**

France's lag has increased and could further deteriorate in the absence of concerted action











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Distribution channels





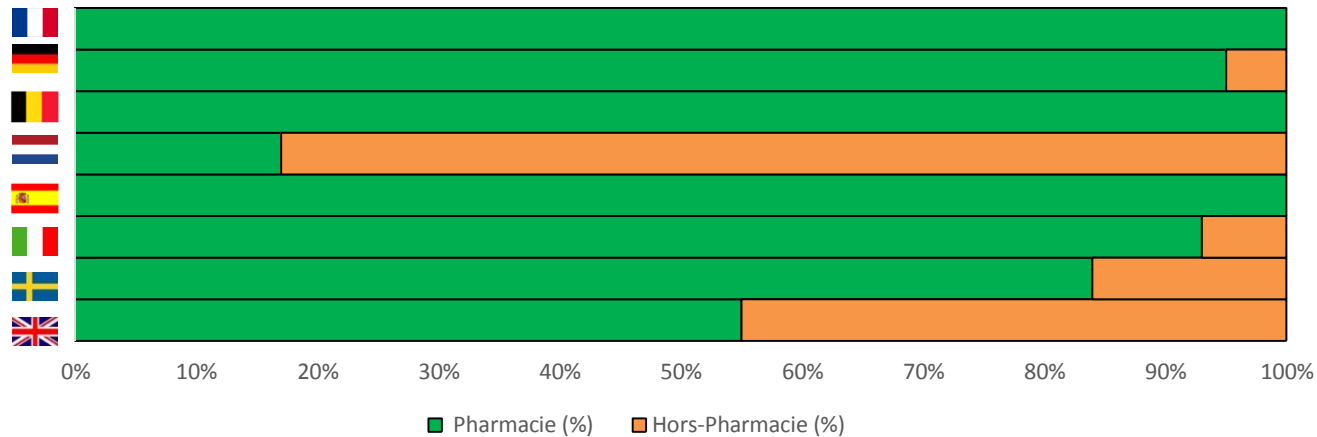
Overview of distribution channels for self-medication in Europe

Country \ Channel	Pharmacy	Internet	Drug store	Supermarket	Service station
 France	✓	✓ 2012	✗	✗	✗
 Germany	✓	✓ 2004	✓ 2007	✓ 2007	✗
 Belgium	✓	✓ 2009	✗	✗	✗
 Netherlands	✓	✓	✓ 1921	✓ 2007	✓
 Spain	✓	✓ 2006 (NA)	✗	✗	✗
 Italy	✓	✓ Mars 2014	✓ 2006	✓ 2006	✗
 Sweden	✓	✓ 2006	✓ 2009	✓ 2009	✓
 UK	✓	✓ 2000	✓	✓ 1991	✓



Weight of each distribution circuit in self-medication around Europe

Spread of distribution of circuits (%)



Points of sale

- **Pharmacies:**
 - Physical pharmacy
 - Internet
- **Other:**
 - Drug store
 - Supermarket
 - Service station

Country	Pharmacy (%)	Internet (%)	Drug store (%)	Supermarket (%)	Service station (%)
France	100	-	-	-	-
Germany	87	8	5	-	-
Belgium	93	7	-	-	-
Netherlands	14	3	71	10	2
Spain	100	-	-	-	-
Italy	93	-	4	3	-
Sweden	81	3	4	10	2
UK	47	8	-	45	-

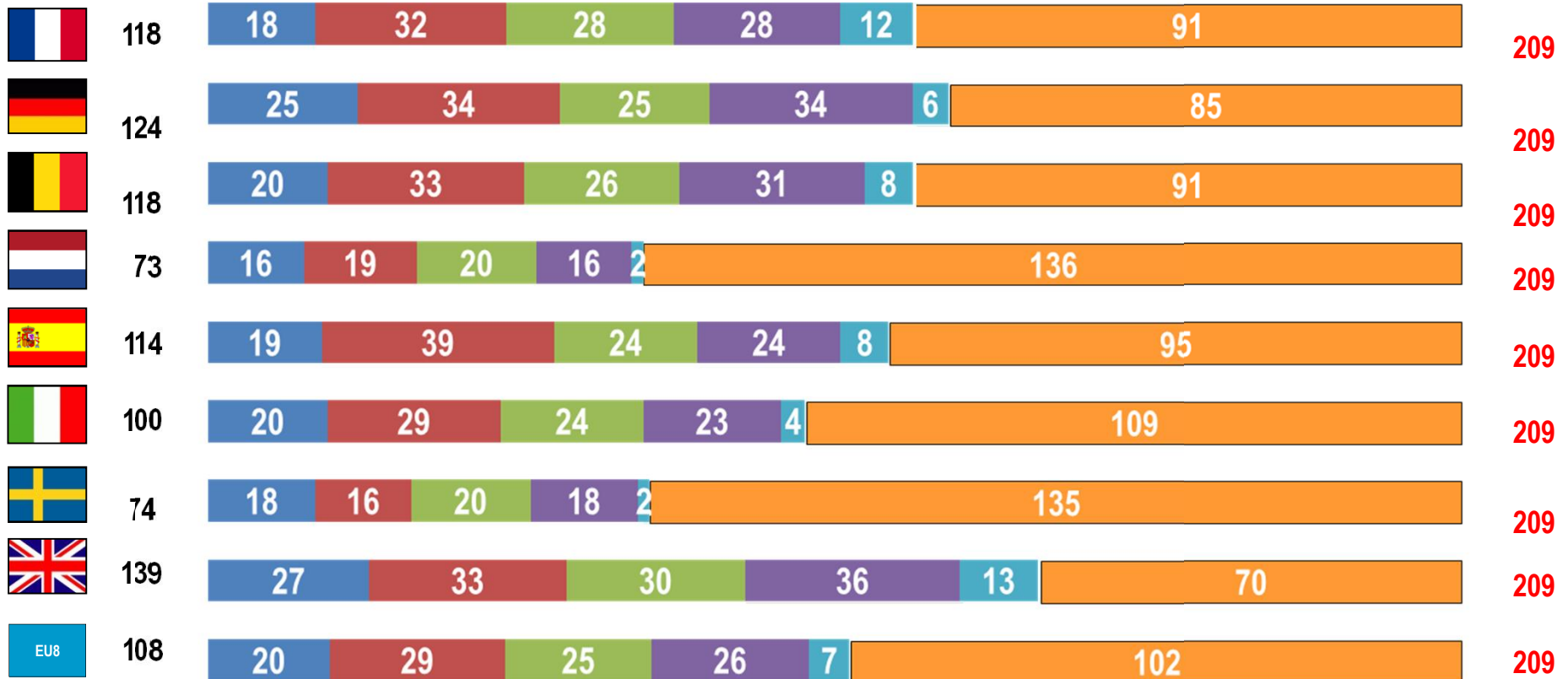


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Potential of the self-medication market



Significant potential for development of self-medication in France



■ Douleur
■ Voies digestives
■ Autres
■ Voies respiratoires
■ Dermatologie
■ Potentiel de développement en automédication



Significant switches possible in France with respect to European practices

On the basis of the molecules available under self-medication in the 8 countries, **significant switching could be envisaged**

Indication	Molecule
Allergic rhinitis, seasonal or non seasonal	Desloratidine, Prednisone, etc.
Acne	Erythromycin
Allergic conjunctivitis, seasonal or non seasonal	Epinastine
Motion sickness	Hyoscine
Insect bites, nettle stings, localised sun burn	Fluticasone



POTENTIAL OF THE SELF-MEDICATION MARKET : KEY CONCLUSIONS

- ❑ The potential for the development of self-medication in France is considerable
- ❑ Thanks to the simple switching of certain molecules...
- ❑ ...And others requiring more specific assistance to patients
(for example: the treatment of gastric and duodenal ulcers [Nizatidine])

**Simple solutions to promote
the development of
self-medication in France**











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Self-medication prices: current status and development



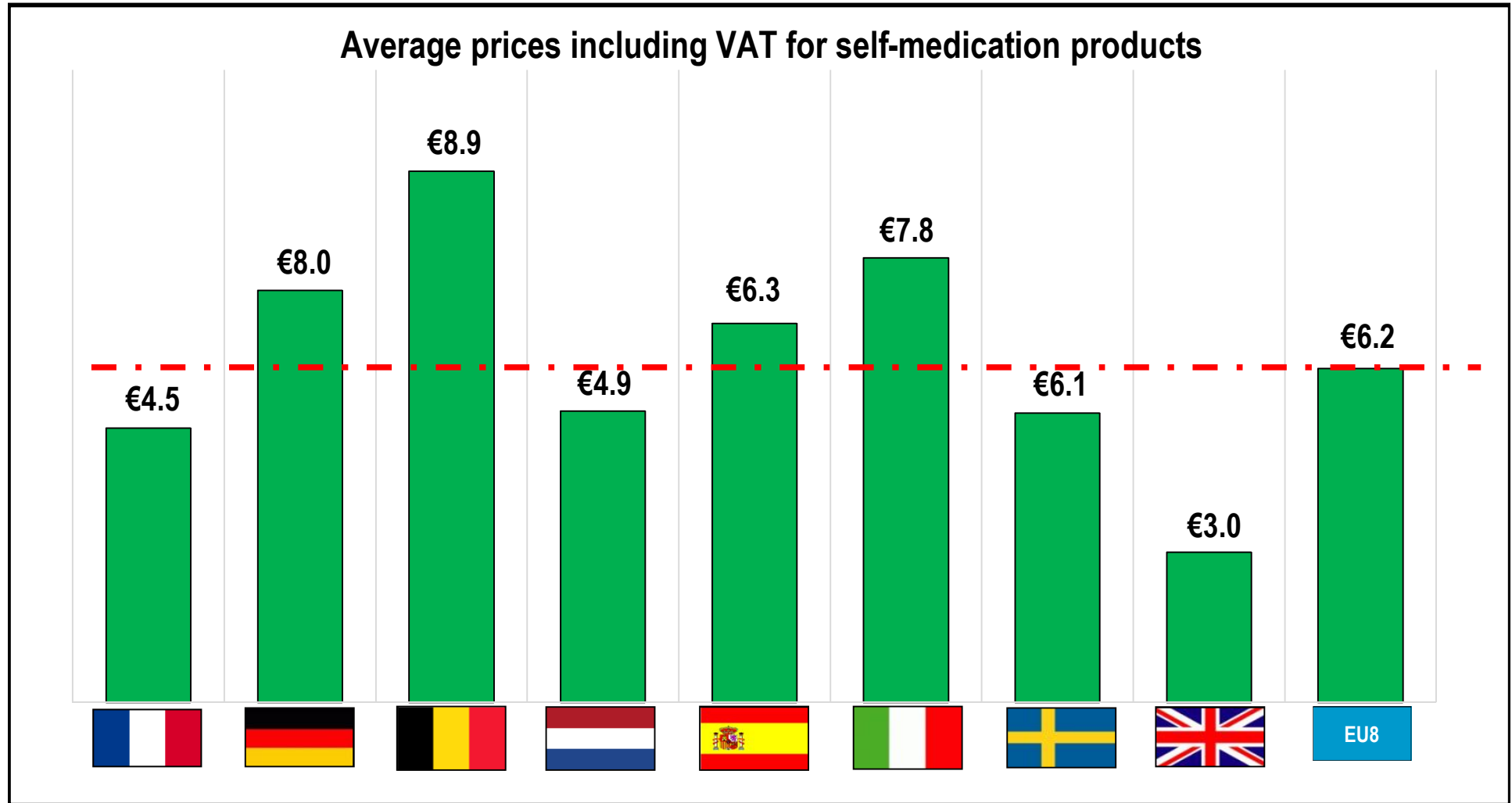


The regulation of self-medication prices in Europe

Country	Non reimbursable self-medication products		Reimbursable self-medication products	
	Regulated prices	Non regulated prices	Regulated prices	Non regulated prices
	-	✓	✓	-
	-	✓	-	✓
	✓	-	✓	-
	-	✓	-	✓
	-	✓	✓	-
	-	✓	Self-medication products are not reimbursable in Italy	
	-	✓	✓	-
	-	✓	✓	-



































Price levels in France significantly below the European average





Prices per unit very low in France (1/2)

Methodology: Survey of product prices for the same format and same dosage in retail pharmacies in each country, compared per dosage unit

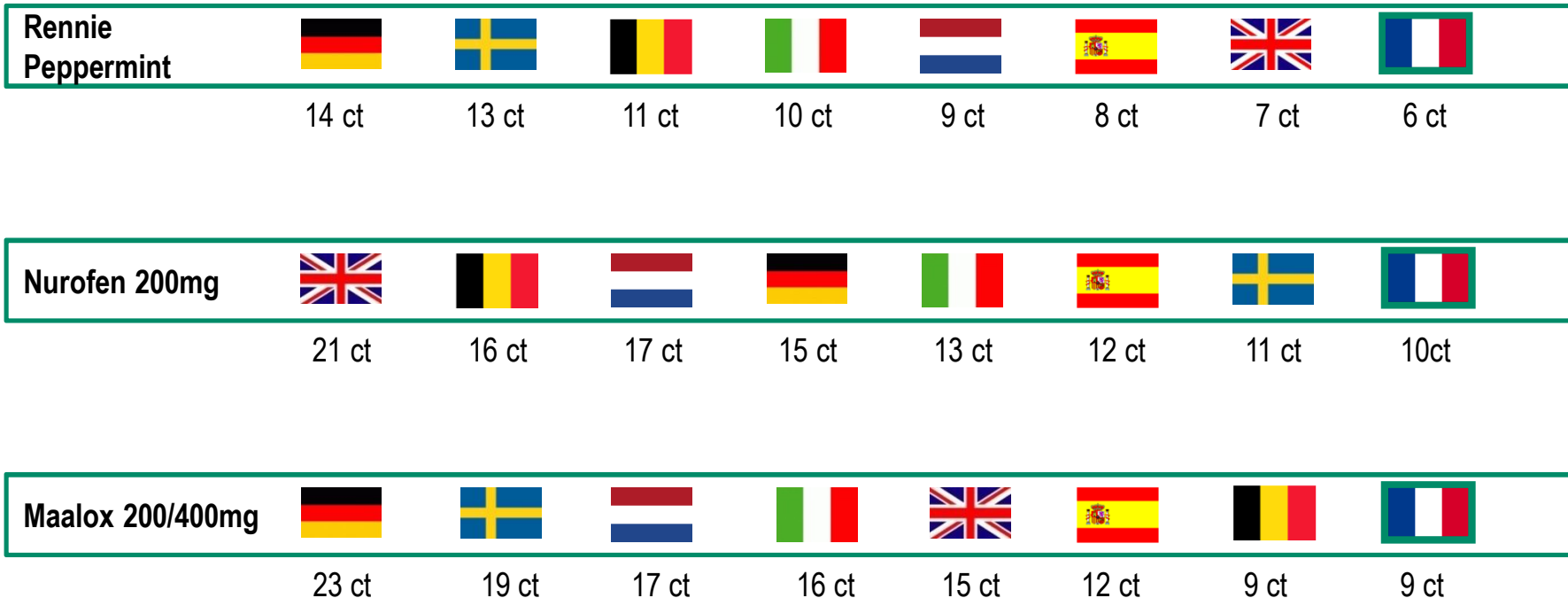
Nicorette 2mg Menthol								
	23 ct	23 ct	22 ct	20 ct	19 ct	15 ct	13 ct	13 ct
Imodium 2mg								
	72 ct	45 ct	44 ct	37 ct	36 ct	32 ct	32 ct	23 ct
Dulcolax 5mg								
	21 ct	17 ct	15 ct	13 ct	13 ct	12 ct	12 ct	12 ct
Strepsil honey-lemon								
	33 ct	25 ct	25 ct	22 ct	21 ct	19 ct	18 ct	13 ct

Source: Interviews of pharmacists in the 8 European countries – Celtipharm Analysis



Prices per unit very low in France (2/2)




Methodology: Survey of prices of products in the same format and same dosage in retail pharmacies in each country, compared per dosage unit



Source: Interviews of pharmacists in the 8 European countries – Celtipharm Analysis



Comparison of prices of self-medication products: Italy and France

	Distribution channel	Average price of a self-medication product (€)		Rate of change in average prices of self-medication products between 2012 and 2013
		2012	2013	
	Supermarket	5.80	5.93	2.2%
	Pharmacy*	7.40	7.60	2.7%
	Pharmacy	4.51	4.57	1.3%

The analysis of average prices for self-medication products shows that **prices in French pharmacies are below those practised in Italy and, in particular, by supermarkets.**

* Calculated on the basis of the product range available in supermarkets



DEVELOPMENT OF SELF-MEDICATION MARKETS IN 2013: KEY CONCLUSIONS

- ❑ **Low prices** in France for self-medication products ...
- ❑ ... And **lower** than those practised in the other European countries (regardless of the distribution channel)

**Conditions are favourable to the
development of self-medication in France**



8

Conclusion





Ensuring the necessary conditions for the development of self-medication in France

- ❑ In 2013, in contrast to other European countries, the market for responsible self-medication in France suffered a recession. **Growth in self-medication in France remained lower than the European average.**

- ❑ Nevertheless, **the potential for the development of self-medication remains significant** in France, especially given the favourable underlying conditions:
 - For example, the level of prices in France is lower than the European average

Self-medication will not develop in France unless there is **a real political impetus and a genuine desire by the public authorities.**

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