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3RD EUROPEAN OBSERVATORY ON SELF-MEDICATION IN 2014

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Overview

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1

Introduction

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51st Annual AESGP Annual Meeting – Key findings

- **The empowerment of citizens in the management of their own healthcare is a widespread trend,** at the heart of European public health concerns and policies.
  - Individuals are playing an increasingly active role in their own well-being and health, including in the choice of their medications.
  - The information and training available to patients and healthcare professionals is expanding significantly.

- The regulatory environment, both with respect to **switching policies and healthcare coverage models,** remains a win-win solution for patients, healthcare systems, and industry.
  - **Switching** favours rapid access to care for patients, relieves congestion in emergency and waiting rooms, and leads to a better use of healthcare resources.
  - **Healthcare coverage policies** on minor ailments and conditions strengthen the role of pharmacists and empower patients.

2

Observatory objectives and methodology

Objectives of the 3rd Observatory

- Following on from the 2nd European Observatory on Self-Medication conducted in June 2014, this 3rd Observatory aims to assess developments in European markets and regulatory frameworks …

- ... by analysing 8 European countries EU8

Germany	Italy
Belgium	Netherlands
Spain	UK
France	Sweden

This Observatory seeks to determine the state of play of the self-medication landscape in Europe, in particular that of France, by analysing a range of relevant indicators.

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Methodology of the 3rd Observatory (1/2)

- The data used in this Observatory were collected from questionnaires conducted with:
  - The Association of the European Self-Medication Industry
  - Self-medication associations in the 8 European countries analysed

Germany	Italy
Belgium	Netherlands
Spain	UK
France	Sweden

  - Specialised and expert consultants

Réseau Insight Health

Methodology of the 3rd 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 Metropolitan France.

- The data collected were analysed by Celtipharm consultants.

- Data and analyses were validated by a **Scientific Committee.**

3

Evolution in self-medication markets in 2014

AFIPA's definition of self-medication

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.

Optional medical prescription		Mandatory medical prescription
Regulated prices Reimbursable medicines for which a medical prescription is optional, that are not reimbursed (**OTX**)	Reimbursable medicines for which a medical prescription is optional, that are reimbursed (**OTX**)	Rembursable prescription medicines that are reimbursed (**RX**)
Non reimbursable medicines for which a medical prescription is optional (**OTC**) Non regulated prices	Non reimbursable medcines for which a medical prescription is optional (**OTC**)	Non reimbursable prescription medicines

Non prescribed - Non reimbursed
On pharmacist's advice

Prescribed by a physician

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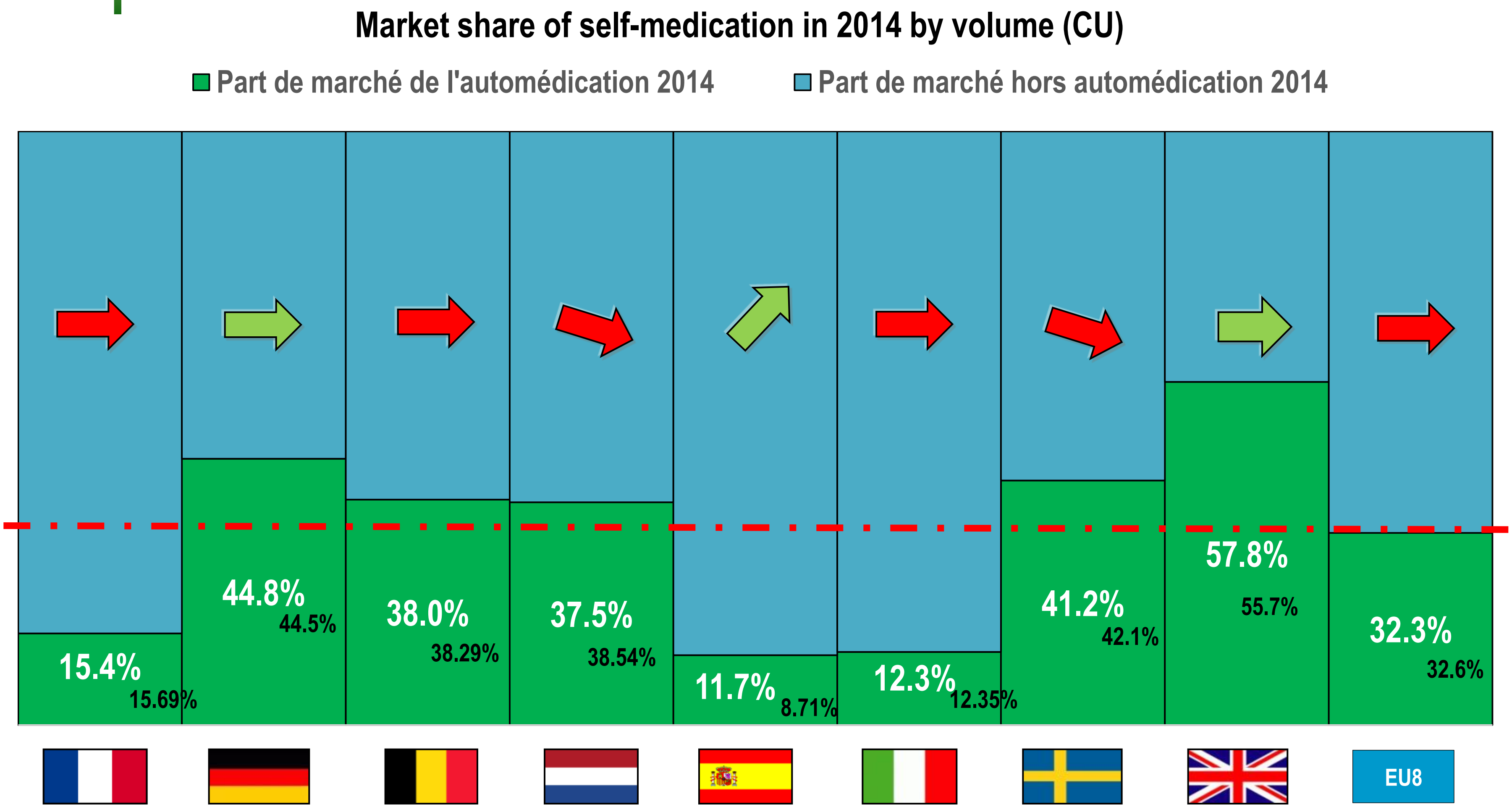
Market share of self-medication by volume



Figures in white refer to the market share of self-medication in 2014
Figures in black refer to the market share of self-medication in 2013

Source: AESGP –Celtipharm Analysis

Findings: how did self-medication evolve in Europe in 2014?

Country	Main changes	Switching	Change in self-medication	Comments
FRA	-	-	-	2014: No significant developments as the political context remained unchanged from 2013. Absence of flu or gastroenteritis epidemics.
GER	+	-	++	2014: Growth in the self-medication market. Regulatory measure in 2014: reduction in rebates on prescription medicines from 16% to 7%.
BEL	-	-	+	2014: Self-medication market driven by flu and pain remedies.
NETH	-	-	-	2014: Absence of flu epidemic leading to a reduction in sales of cold and cough medicines.
SP	+	-	++	Political measures in 2012: waves of de-reimbursements/reductions in the price of prescription medicines, resulting in a shift by pharmacists to self-medication.
ITA	-	-	-	2014: No major developments as the Italian political context remained unchanged.
SWE	-	-	-	2014: No major changes.
UK	-	- -	- -	2014: Re-switching of Domperidone and Diclofenac

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Source: *Celtipharm Analysis*

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Evolution in self-medication markets in 2014 – Key conclusions

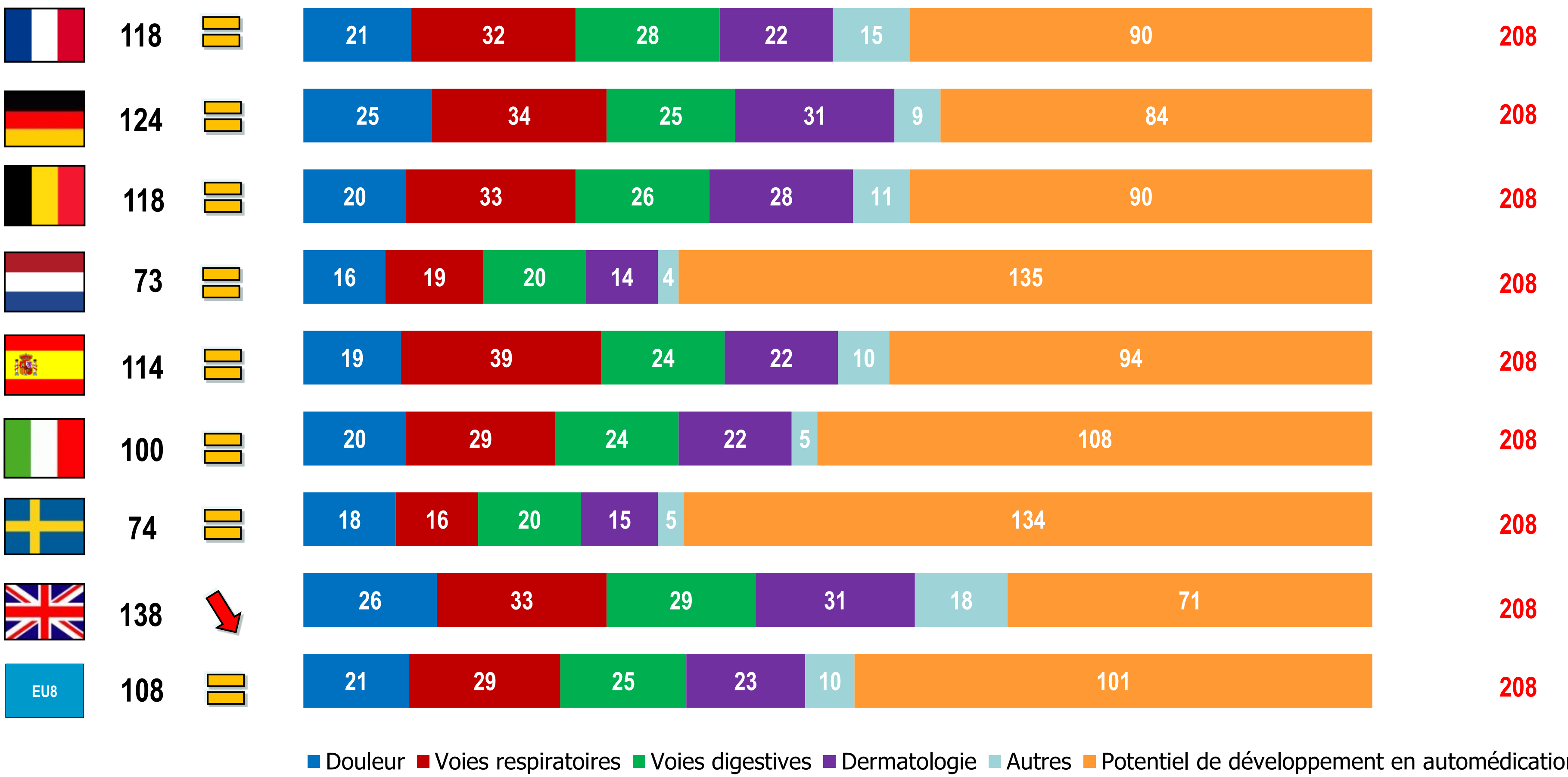
- The market share of self-medication in France **remains lower** than the European average.
- **Extremely varied context for self-medication** within the European panel under analysis. Overall, the European self-medication market was in stagnation in 2014.
- Certain countries, such as Spain, enjoyed a particularly dynamic market.

Despite real economic potential,
France continues to lag behind
other European countries.

4

Potential of the self-medication market

Significant potential for the development of self-medication in France



*Since 4 September 2014, Domperidone available only on prescription in the UK
Since January 2014, Diclofenac available only on prescription in the UK

Molecules switched in at least 1 of the 8 countries among a common scope of 208 molecules

Source: AESGP – Celtipharm Analysis

Potential of the self-medication market – Key conclusions

- Given practices in other European countries, **there is significant potential for the development of self-medication in France**.
- **Despite this favourable context, the market was slightly down in 2014**: – 0.4% in value and –0.7% in volume.
- **This decline is linked to the absence of any significant regulatory change** (no switching in 2014) and the absence of any real political will.

The French self-medication market remains fragile and in need of concrete political measures.

5

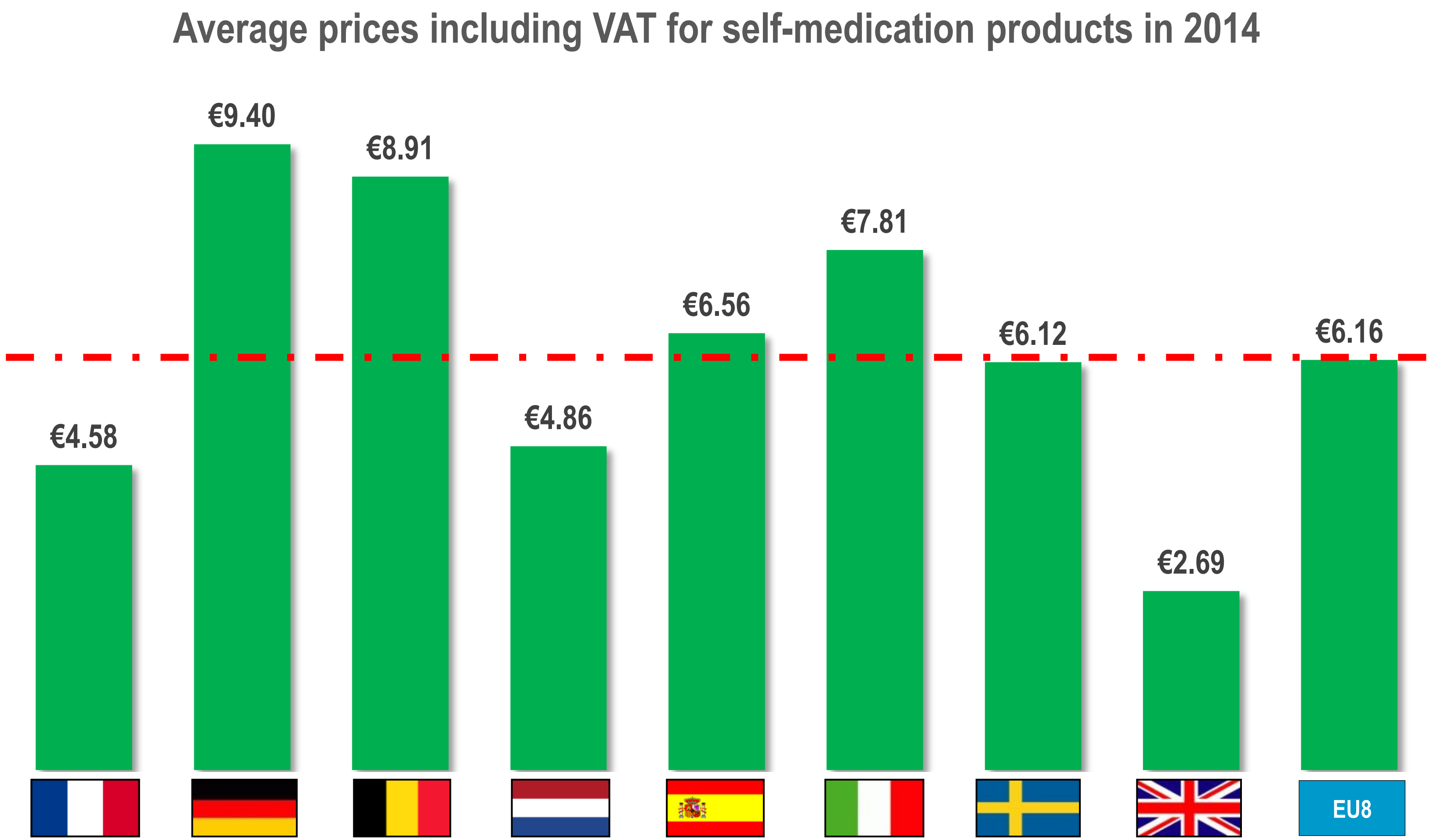
Status and evolution of self-medication prices

Overview of self-medication regulations in Europe

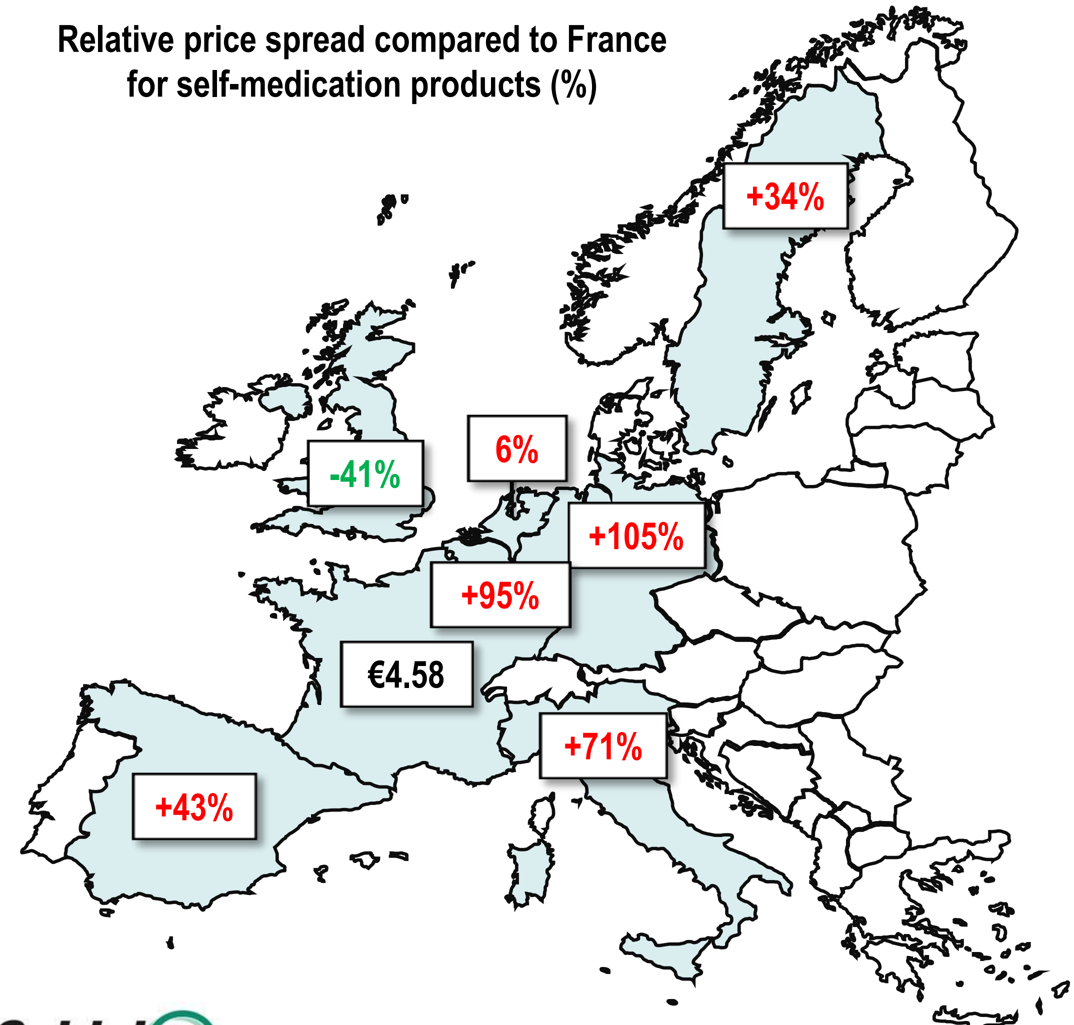
Country	Non reimbursable self-medication products		Reimbursable self-medication products	
	Regulated prices	Non regulated prices	Regulated prices	Non regulated prices
	-	√	√	-
	-	√	-	√
	√	-	√	-
	-	√	√	-
	-	√	√	-
	-	√	Self-medication products are not reimbursable in Italy	
	-	√	√	-
	-	√	√	-

Source: AESGP – Agora Consulting – Eurostat – Celtipharm Analysis

French prices well below the European average



French prices well below the European average



- France remains the 2nd cheapest country in Europe.
- Italy is 71% more expensive than France.
- Spain is 43% more expensive than France.

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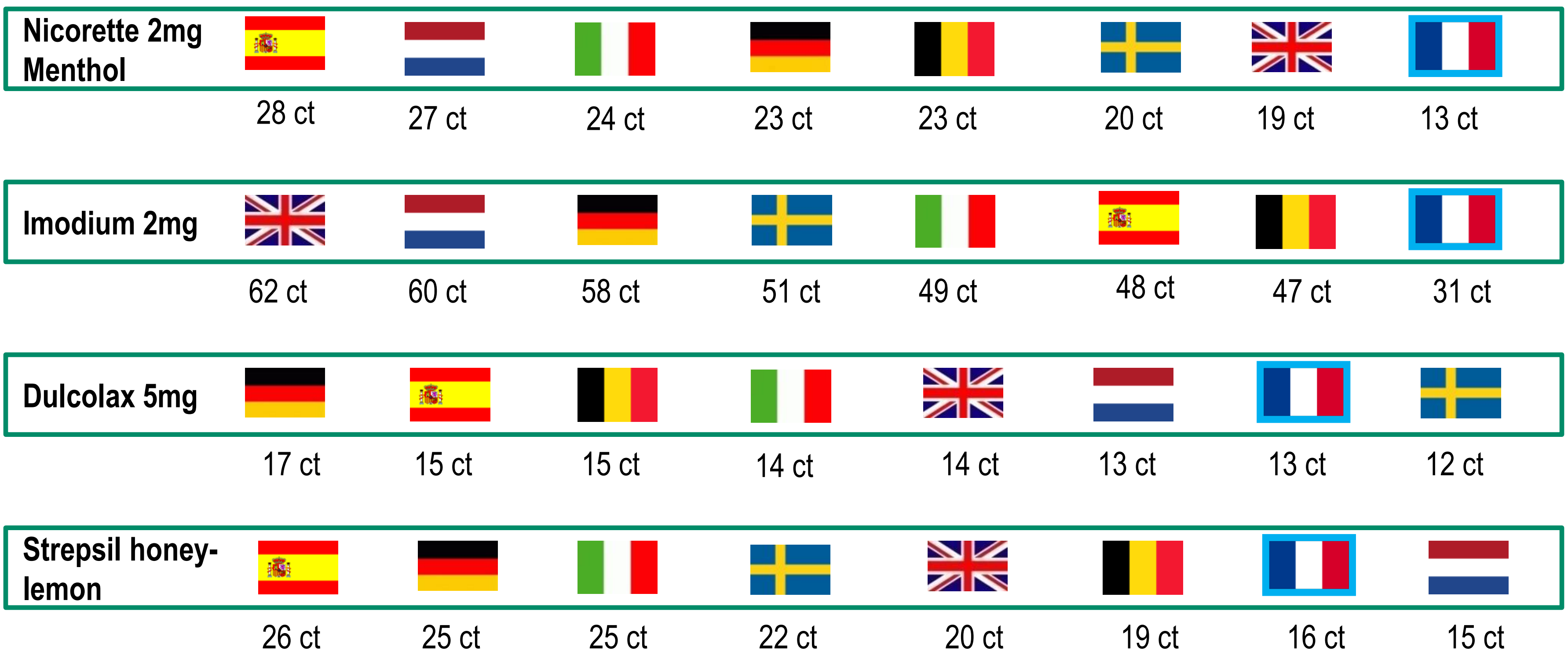
Self-medication prices among the least expensive in France (1/2)

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



Source: Survey conducted with pharmacists in the 8 European countries – Celtipharm Analysis

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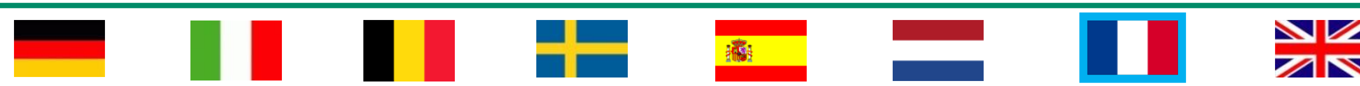
Self-medication prices among the least expensive in France (2/2)

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

Rennie Peppermint



18 ct	15 ct	14 ct	13 ct	13 ct	11 ct	10 ct	7 ct

Nurofen 200mg

37 ct	17 ct	16 ct	14 ct	13 ct	11 ct	10 ct	10ct

Maalox 200/400mg

23 ct	19 ct	17 ct	16 ct	15 ct	12 ct	9 ct	9 ct

Bepanthen 5% 100g

24 ct	17 ct	16 ct	16 ct	13 ct	12 ct	9 ct	8 ct

Source: Survey conducted with pharmacists in the 8 European countries – Celtipharm Analysis

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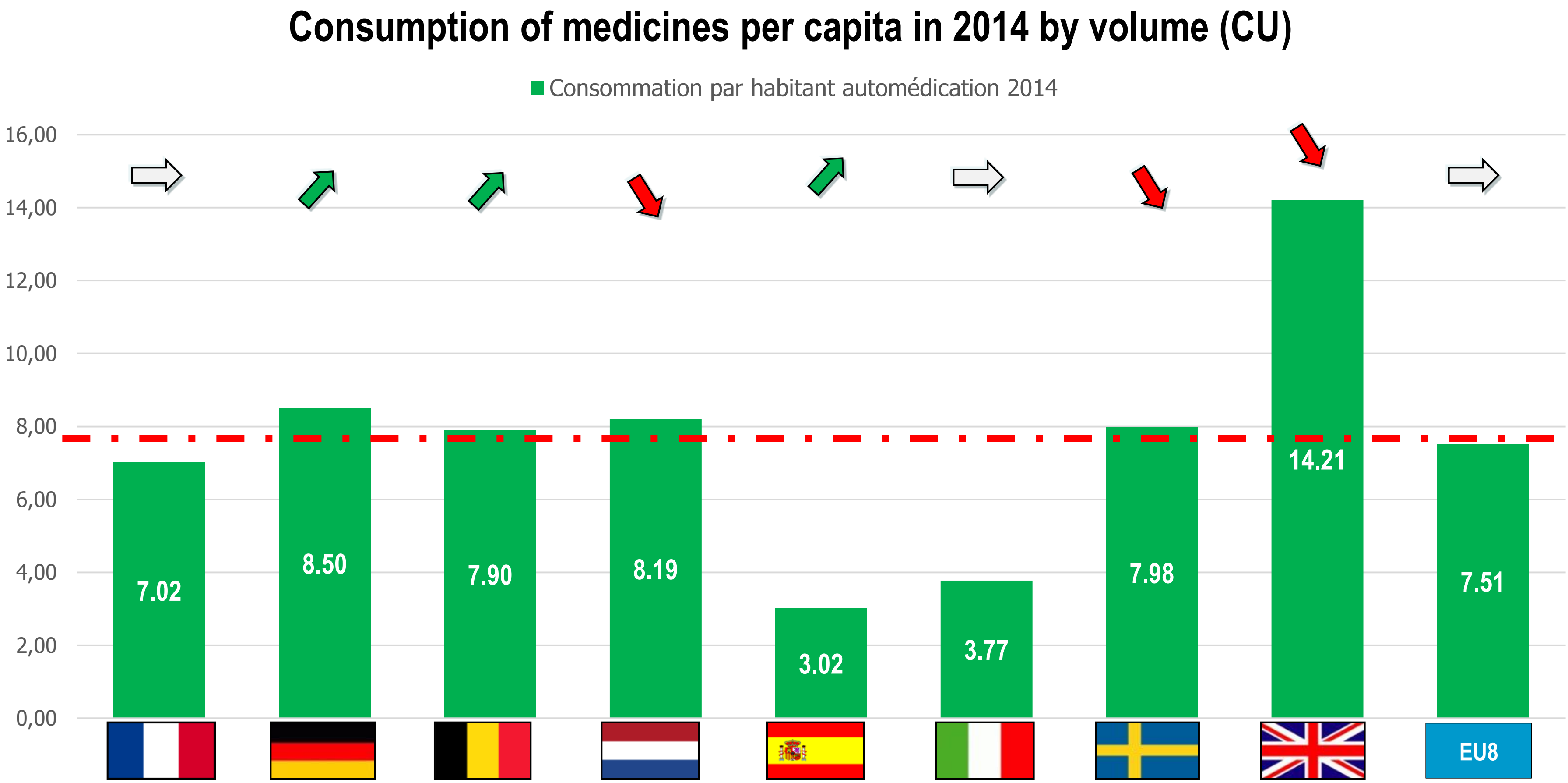
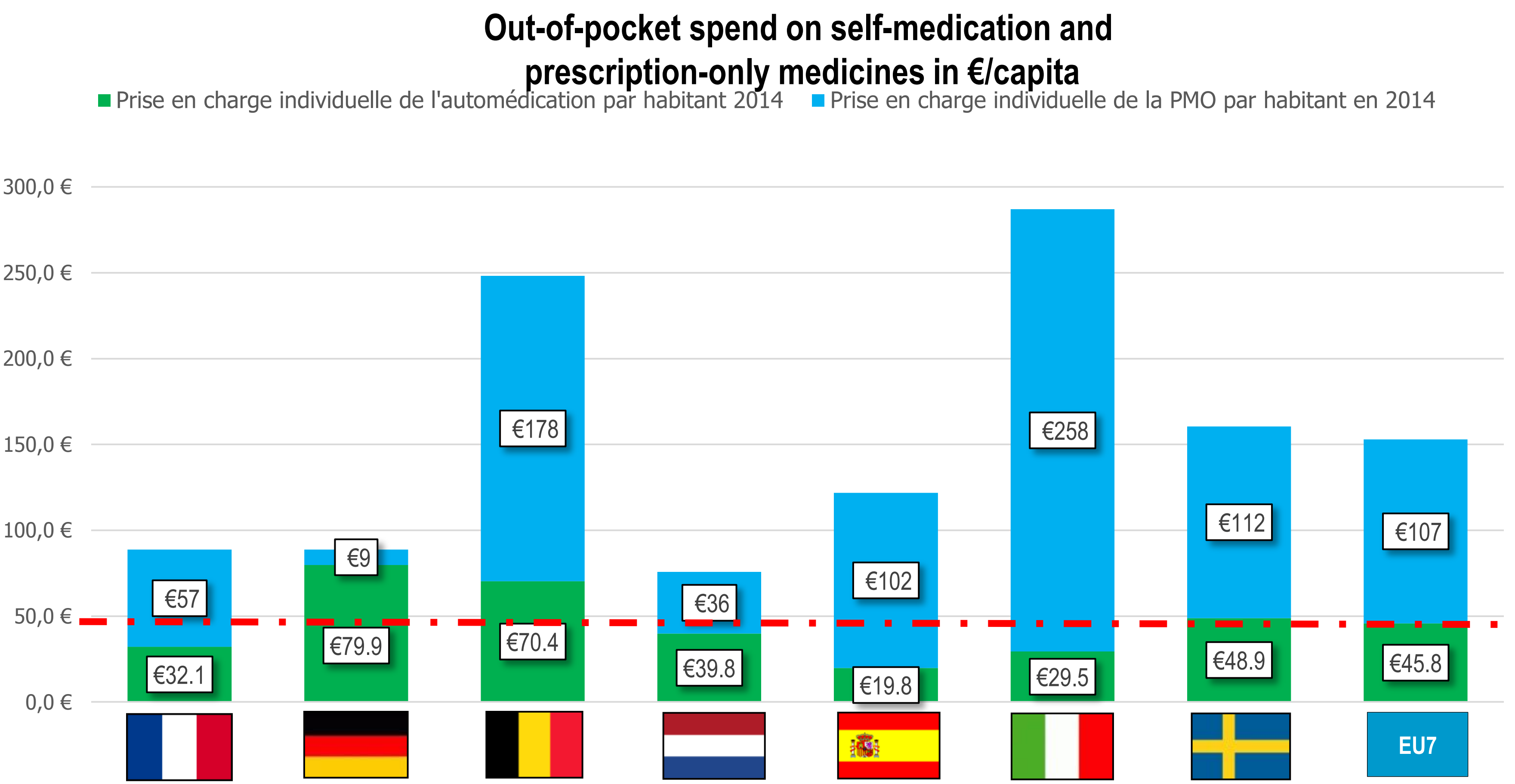
Annual self-medication spend per capita below the European average

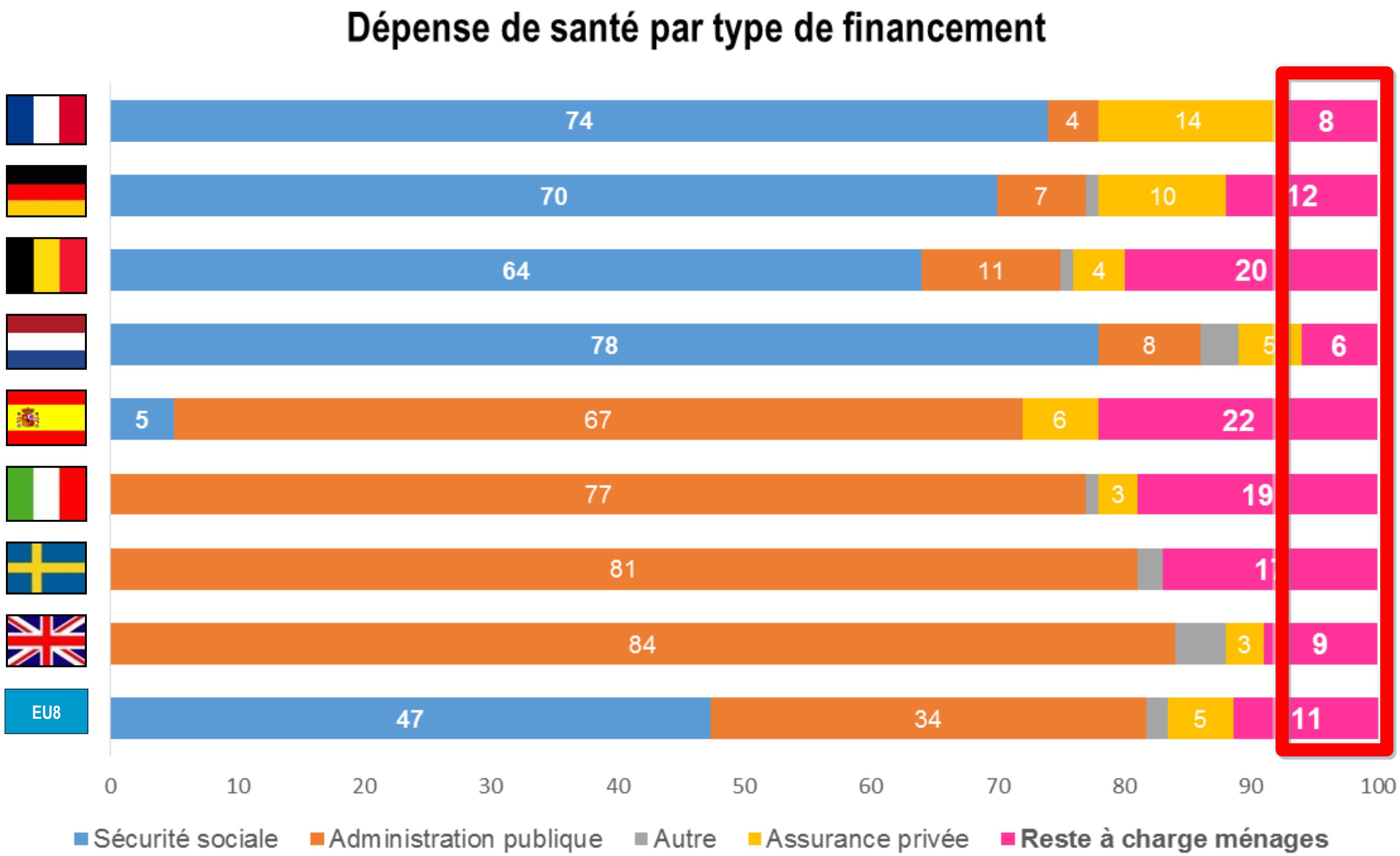


In France, the self-medication spend per capita among the lowest in Europe



Source: AESGP – Agora Consulting – Eurostat – Celtipharm Analysis

In France, out-of-pocket health expenses among the lowest in Europe



Source: OECD Health at a Glance 2014

Status and evolution of self-medication prices – Key conclusions

- **The level of French prices remains among the lowest in Europe**: €4.58 on average.

- Similarly, **the self-medication spend per inhabitant is quite low compared to the European average**.

A state of affairs confirming the fact that **competition is playing its role in the French self-medication sector.**

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6 European healthcare models

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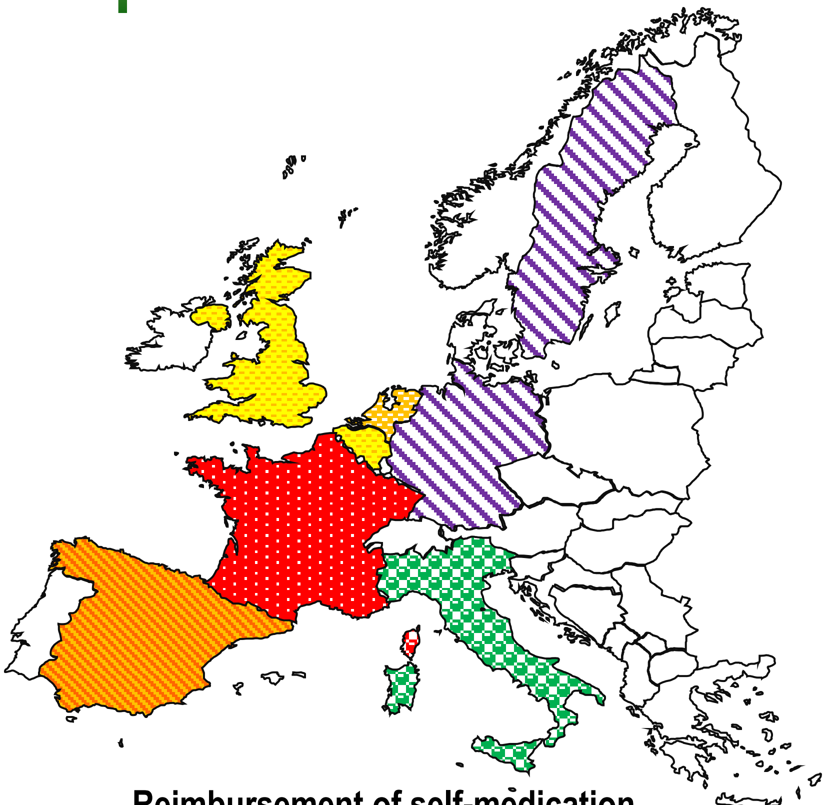
Coverage of non-prescription medicines (NPMs) in Europe



Reimbursement of NPMs not authorised

Reimbursement of NPMs possible only for certain serious/chronic illnesses

Reimbursement not common – very few NPMs are eligible

Reimbursement of NPMs possible, except for minor symptoms

Reimbursement of NPMs authorised

Reimbursement of self-medication products in Europe

**Policies for the coverage of non-prescription medicines vary widely within Europe.
France is the only country to authorise cover without restriction.**

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Source: Celtipharm Analysis

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European healthcare models – Key conclusions

- Even though self-medication medicines are affordable, **the French system favours public health cover of minor ailments and conditions**.

- This model is not adapted to the current socio-economic context:
  - It fails to encourage responsible behaviour by patient-consumers.
  - It contributes to a complex treatment path for benign pathologies.

7

Spain: a role model for self-medication

Ambitious public health reforms – Healthcare cover

- The amount of co-payment was increased in 2012, as the result of a Health Ministry decision.
  - **Medicines indicated for the treatment of minor symptoms, containing an active ingredient and benefiting from a safety profile and a level of efficacy that is sufficiently documented after years of experience and intensive use.**
  - Medicines coexisting with an OTC medicine containing the same active ingredient and the same dosage.
  - Medicines with a reduced therapeutic benefit.
  - Medicines advertised at the European level.

Source: Celtipharm Analysis – Royal Decree-Law 16/2012

A socio-economic context similar to France

- Countries with a similar socio-economic context[1] ...

France	Spain
Population 66 million	**Population** 47 million
GDP 2014 €2,132.40 billion	**GDP2014** €1,029.04 billion
Health spend 2014 11.6% of GDP	**Health spend 2014** 9.6% of GDP

- ... and a similar approach to cover

France	Spain
68% of pharmaceutical spending covered by public funds	**68% of pharmaceutical spending covered by public funds**

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1 Source: AESGP, INSEE, Eurostat

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Case study on Spanish Cover – Key conclusions

- **Spain has placed self-medication at the centre of its national health strategy**. In 2012, it made a number of ambitious political decisions.
- The evolution of the Spanish healthcare system is **a response adapted to today's budgetary constraints and notably to the public's demand to play a greater role in their own healthcare.**
- These reforms were made possible thanks to **the will of the political and administrative authorities.**
- This example could act as a role model for France, provided that **effective measures are introduced to support patients, to provide solutions for those facing financial difficulties, and to continue to train health professionals on the subject of self-medication.**

3rd European Observatory on Self-Medication – Key conclusions

- **France's lag in self-medication continues**, despite conditions that are particularly favourable to growth in the sector: significant growth potential, affordability of self-medication products, secure and effective distribution channels.

- Nevertheless, as demonstrated in this study, **self-medication is a tool that would benefit from support and encouragement.**

- **Its development should occur within a framework of specific measures**. That is why AFIPA has made a number of recommendations in that direction as part of the sector's Strategic Committee, notably:
  - Provision of a range of dedicated self-medication products
  - Assistance to pharmacists in dispensing and training of health professionals
  - Setting up of an Observatory of retail prices
  - Inclusion of self-medication products in patients' pharmaceutical records
  - Launch of a communications campaign for patients.

  ⇒ The objective: **make responsible and safe self-medication the foundation of treatment for minor pathologies**.

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