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*General overview of the
trends on the CEE
pharmaceutical
markets*

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General overview of the trends on the CEE pharmaceutical markets

CEE/CIS region characteristic:

- 28 countries (10 EU members)
- underdeveloped health care system and lack of funds
- public health care sector debt
- difficulties in getting reimbursement status
- relatively new pharma regulations
- unstable /evolving pricing and tax systems

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Impact of the global tendencies:

- Pricing pressure
- Regulatory compliance issues
- Drying pipelines
- Rx/Gx convergence
- Supply chain evolution
- “Health care package” concept

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Regional specific:

- Quality of regulations
- Lack of dialog with regulator
- Vague and unclear long term healthcare policy
- Absence of alternative payers
- Accessibility to new products
- Parallel trading

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It is happening everywhere ...

- Polish New Reimbursement Law and commercialisation of hospitals
- Czech Healthcare Package
- Amendments to Hungarian pharma regime
- Russian new drug policy

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Major challenges

- Securing the “top line”
- Redesigning the offer addressed to payer
- Implementation of “smarter” distribution model
- Balancing business and regulatory compliance
- Need to properly manage HR

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“Four stage” approach

- Portfolio analysis
- Remodeling of sales and marketing tools
- Review of business structure and value chain
- Apprising and redeployment of available Human Resources

Bardzo Dziękuję ! Köszönöm !

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