

The role of generics for drug policy of Romania

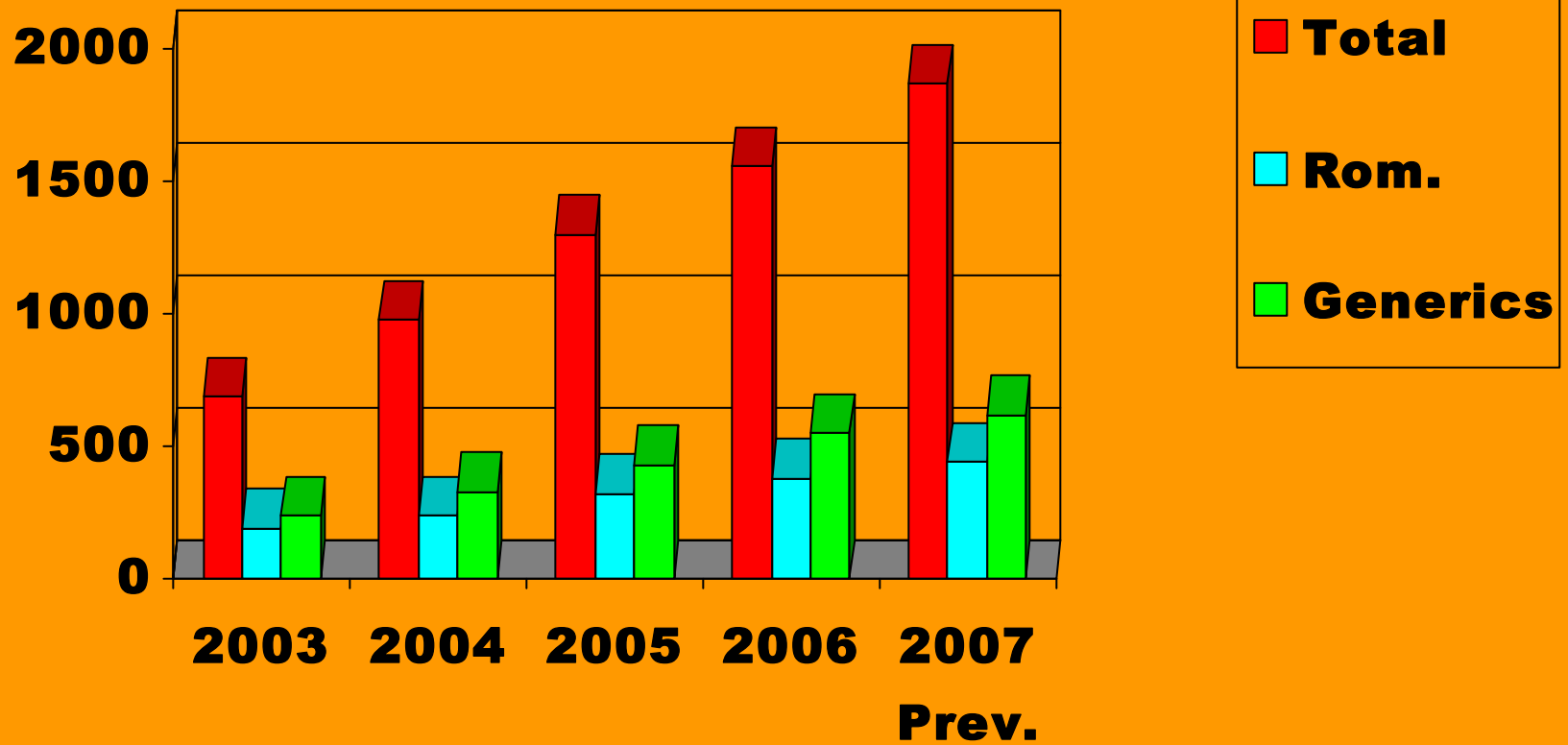
- **APMR**



Romania - key facts

- **Population: 21.6 mil.(incl.emigration)**
- **Physicians: 44,500(2/1000 capita)**
- **Hospitals: 450(8 privately)**
- **Pharmacists: 6,800**
- **Pharmacies:5,500(1000 in chains)**
- **Distributors: ~100**
- **Producers: 39(28-drugs with MA, 11-raw materials,oxygen,plants)**
- **Consumption per capita 2006:72 EUR**

Evolution of pharmaceutical market 2003-2007 (mil.EUR)



Structural of market 2006

	mil.EUR	%
● Total	1560	100
● OTC	280	18
● Hospitals	400	25
● Rx through pharm.	880	56
● -from this-CNAS funds	750	48
● Total CNAS funds	1150	73
(Hosp. + Rx pharm.)		

Value vs. Volume 2006

	Value %	Volume %
● 0-10 RON/Unit	22.3	75.3
● 10-25 RON/Unit	21.9	17.1
● 25-50 RON/Unit	13.6	4.7
● 50-100 RON/Unit	9.3	1.6
● 100-200 RON/Unit	8.3	0.8
● 200-300 RON/Unit	4.3	0.2
● >300 RON/Unit	20.3	0.3
● 1st Conclusion: ~44%(0-25RON/0-7.5EUR) Value = 92% Volume		
● 2nd Conclusion: ~33%(>100RON/30EUR) Value = 1.3 Volume		

Note:1 RON=0.5 LEVA

Ranking of the Top 10 ATC Groups

- **1.N02B-Analgezical,antipyretical**
- **2.C09A-Inhibitors of angiotensine conv.enzyme**
- **3.J01C-Penicylins large spectrum**
- **4.M01-ANonsteroidian aniinflam./antirheum.**
- **5.C10A-Hypocolesterol/hypoglicemiants**
- **6.C04A-Peripheral vasodilatator drugs**
- **7.N05A-Antipsicotics**
- **8.J01D-Betalactamic antibiotics(Cephalospor.)**
- **9.B03C-Another antianemic drudg(Erythropetine)**
- **10.A10C-Insulins and analogous drugs**
- **Total value Top 10 - 504 mil.EUR(30.5%)**

Raking of the Top 10 Molecules (Value)

- **1.Amoxicillinum + Ac.clavulanicum**
- **2.Trimetazidinum**
- **3.Indapamidum**
- **4.Ibuprofenum**
- **5.Metamizolum (Algocalmin) !!**
- **6.Nicergolinum**
- **7.Ampicillinum**
- **8.Ceftriaxonum**
- **9.Simvastatinum**
- **10.Ketoprofenum**

Raking of the Top 10 Molecules (Volume)

- **1. Metamizolum (Algocalmin) !!**
- **2. Paracetamolum**
- **3. Acidum acetilosalicilicum**
- **4. Ibuprofenum**
- **5. Combinations- Antinevralgic**
- **6. Amoxicillinum**
- **7. Ampicillinum**
- **8. Enalaprilum**
- **9. Oxacillinum**
- **10. Omeprazolum**

Raking of the Top 10 Companies

- **1. GlaxoSmithKline (incl. Europharm)** 8 %
- **2. Hoffman LaRoche** 6.9%
- **3. Sanofi-Avensis** 6.6%
- **4. Novartis (incl. Sandoz Rom.)** 6.3%
- **5. Lab. Servier** 5.7%
- **6. Pfizer** 5.7%
- **7. Ranbaxy-Terapia (R)** 5.1%
- **8. Zentiva (R)** 5.1%
- **9. Antibiotice (R)** 3.1%
- **10. Krka D.D.** 2.7%

Main current: Hurdles

- **-Non-coherent Generic Policy by the government**
- **-Doctors under pressure by originators and with false ideas on generic quality**
- **-Only 20-25% generic prescription**
- **-Actual order of Ministry of Health regarding local generics price is non-competitive**
- **-No real incentives for pharmacists and patients**

Key new developments

- **-New convention between Min.Health and producers/distributors/pharmacies (New price order)**
- **-Internet doctors/pharmacies -Insures House activities**
- **-Introduction of „New generics” (2007/8 high number of patent expiries)**
- **-Campaign generics promoted by the government**

ROMANIAN PHARMACEUTICALS PRODUCERS ASSOCIATION



- **Thank you very much for your attention !**