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PC-S-CP (2008) 07

EUROPEAN COMMITTEE ON CRIME PROBLEMS
(CDPC)

GROUP OF SPECIALISTS ON COUNTERFEIT PHARMACEUTICAL PRODUCTS
(PC-S-CP)

Patent-protected medicines on market in Europe

Secretariat note for information

1. Data sources

1.1 Information Solutions for Pharmaceutical and Healthcare industries (IMS Health)

Information about size of different parts of the market (“never protected”/“no longer protected”/“protected”/ “on patent products”/“other-not classifiable”) of the market in terms of volume made available by IMS, UK.

Note: The information was given by IMS exclusively for use in working documents in the frame of the scope of the activities carried out by the Council of Europe DG Human Rights and Legal Affairs.

1.2 Business Insights. Pharmaceutical Growth Opportunities in Brazil, Russia, India and China (BIRC); Revati Nehru (2006)

Information: Russia (2005)

1.3 European Generics Association (EGA)

EGA 2006 market review

*Note: EGA data may serve as complementary background information to the data in 1.1 as the proportion of generics on the market depends from various factors:
e.g. size of innovative pharmaceutical industry,
reimbursement system and approaches,
attractiveness of market for a generic medicine from an out of patent medicine (e.g. pricing of off-patent original medicines, doctors’ prescribing patterns),
historical/current patent protection legislation and status.*

IMS (Data source 1.1)
Year to September 2007: Volume (SU¹s)

Note: The information was given by IMS exclusively for use in working documents in the frame of the scope of the activities carried out by the Council of Europe DG Human Rights and Legal Affairs.

France Combined ²	%
NEVER PROTECTED	42%
NO LONGER PROTECTED	32%
Other	3%
PROTECTED	22%
	100%

Germany Combined	
NEVER PROTECTED	62%
NO LONGER PROTECTED	21%
Other	2%
PROTECTED	15%
	100%

UK Combined	
NEVER PROTECTED	60%
NO LONGER PROTECTED	25%
Other	2%
PROTECTED	13%

Italy Combined	
NEVER PROTECTED	49%
NO LONGER PROTECTED	20%
Other	8%
PROTECTED	23%

Spain Combined	
NEVER PROTECTED	46%
NO LONGER PROTECTED	30%
Other	11%
PROTECTED	13%

Greece (Retail Only)	
NEVER PROTECTED	42%
NO LONGER PROTECTED	24%
Other	22%
PROTECTED	12%

Belgium Combined	
NEVER PROTECTED	40%
NO LONGER PROTECTED	38%
Other	2%
PROTECTED	20%

Netherland (Retail Only)	
NEVER PROTECTED	61%
NO LONGER PROTECTED	15%
Other	5%
PROTECTED	19%

Sweden Combined	
NEVER PROTECTED	53%
NO LONGER PROTECTED	23%
Other	10%
PROTECTED	13%

Austria Combined	
NEVER PROTECTED	42%
NO LONGER PROTECTED	34%
Other	10%
PROTECTED	14%

Portugal (Retail Only)	
NEVER PROTECTED	48%
NO LONGER PROTECTED	31%
Other	12%
PROTECTED	9%

Switzerland Combined	
NEVER PROTECTED	42%
NO LONGER PROTECTED	29%
Other	9%
PROTECTED	20%

Finland	
NEVER PROTECTED	53%
NO LONGER PROTECTED	27%
Other	4%
PROTECTED	16%

Denmark Combined	
NEVER PROTECTED	62%
NO LONGER PROTECTED	22%
Other	2%
PROTECTED	14%

Czech Combined	
NEVER PROTECTED	76%
NO LONGER PROTECTED	14%
Other	6%
PROTECTED	4%

Norway Combined	
NEVER PROTECTED	47%
NO LONGER PROTECTED	29%
Other	7%
PROTECTED	16%

Ireland (Retail Only)	
NEVER PROTECTED	49%
NO LONGER PROTECTED	31%
Other	3%
PROTECTED	17%

Russia (Datasource 1.2.)	
ORIGINAL BRANDED PRODUCTS	21,90%
LICENSED BRANDED PRODUCTS	5,40%
LOCAL GENERICS (BRANDED)	44,80%
UNBRANDED	9%
PATENT NOT APPLICABLE	18%

¹ Standard Units

² Combined = retail + hospital pharmacy

Data source 1.3

Market Share 2006

Country	Volume %	Value %
1 Italy	7,2	3,7
2 Portugal	9,7	15,2
3 Austria	12,3	10,7
4 Ireland	12,3	6,9
5 Belgium	12,7	8,7
6 Norway	18,6	9,7
7 Spain	28,6	13,7
8 France	31,1	14,7
9 Switzerland	34,6	16,5
10 Finland	36,3	13,5
11 Sweden	42,9	13,7
12 Turkey	50,7	32,8
13 Netherlands	53,4	23,2
14 Germany	56,4	22,8
15 United Kingdom	57,5	28,0
16 Slovenia	58,1	37,9
17 Denmark	68,8	38,5
18 Romania	71,4	31,0
19 Poland	76,7	60,0
20 Latvia	79,3	38,7
21 Czech republic	60,0	34,0
22 Hungary	44,0	29,0
23 Lithuania/Estonia	77,0	50,0

Sources: 1-20, EGA 2007 Market Review; 21-23, EGA 2006 Annual Conference